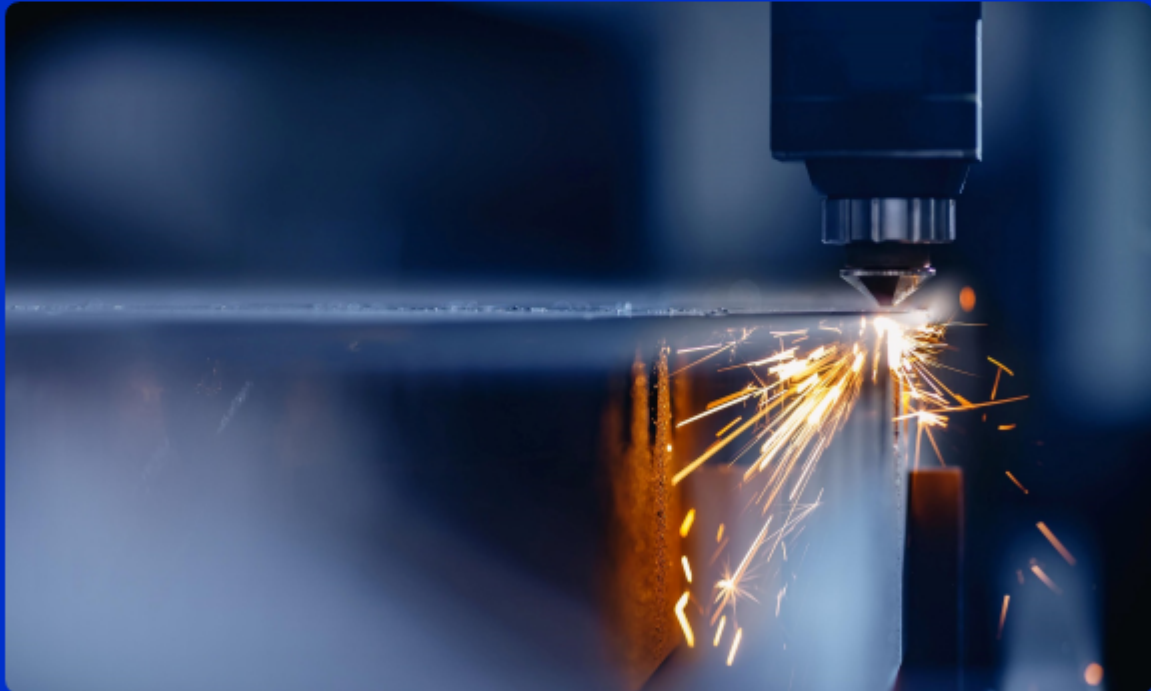


Syspro Torque

Syspro 8

Reference Guide

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syspro

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Topic: Syspro Torque

Exploring

Where it fits in?

Syspro Torque is our AI Studio. It is a cloud-hosted platform that connects large language model intelligence directly to a Syspro environment. You can use it to build AI agents and automated workflows that don't only answer questions about business data, but act on it by posting transactions, querying databases, processing documents, and handing off to a human when a decision needs sign-off.

Benefits

- Automates multi-step ERP processes
A workflow that previously required hours of manual data entry, checking, and copy-pasting can run end-to-end in a single conversation
- No custom code required
Agents and workflows are built by describing what you need in plain language and Torque Builder handles the technical implementation
- Works with your existing Syspro setup
Connects to your on-premise Syspro instance, SQL databases, file shares, and cloud services through a lightweight Windows service (the Executor)
- Keeps humans in control
Configurable intervention points pause a workflow and request approval before any transaction is posted
- Fits inside your security model
Each agent is scoped to the specific business objects and data it needs, while respecting existing Sysprooperator permissions
- Scales across the business
The same platform handles order processing, financial reporting, compliance checks, and custom dashboards enabling teams to build and share agents without involving the IT department

Navigation

Once installed, Syspro Torque can be accessed from the following web address:

- <https://torque.sysprocloud.com/>



UK-hosted tenants can also go directly to <https://torque-uk.sysprocloud.com>. Your account team confirms which region hosts your tenant during onboarding.

Terminology

Syspro Torque

Syspro's AI platform for automating business processes across Syspro ERP, SQL databases, and external services. Torque connects large language model intelligence to your operational systems so agents and workflows can read data, post transactions, and act on business events without custom code. The platform is hosted by Syspro in Microsoft Azure and accessed through a web browser.

AI automation

AI automation includes designing workflows, agents, and their building blocks, including the steps a workflow follows to the tools and constraints that shape how an agent behaves.

Canvas

The output surface where an agent presents its results. Depending on the task, an agent can deliver output as a spreadsheet, dashboard, and report, e.g. a bank statement review presented as a formatted report before a human approves it for posting.

Capability layers

A component added to a managed agent or workflow to extend what it can do or constrain how it behaves. Layer types include skill, MCP server, constraint, enforcement, sub-agent, workflow, example, rule set, Syspro connection, SQL connection, and knowledge base. Layers are stacked as needed; each one is configured independently.

Planning mode

A feature of Torque Builder that pauses before building to ask clarifying questions and present a plan for review. The user approves or adjusts the plan before Torque Builder executes it. Planning mode is recommended for all but the simplest builds.

Template workflow

A pre-built workflow made available for reuse. Template workflows are seeded into a tenant at provisioning time, pushed by Syspro as a campaign update, or installed on demand from the marketplace. They work the same way as any other workflow once deployed; the difference is origin, not mechanics.

Workflow

A predetermined, repeatable sequence of steps that Torque executes automatically. Workflows are more structured and deterministic than managed agents. Each step is defined and maps to a visual graph. They are built by Torque Builder or configured manually, and can be triggered by a user, a file arriving in a watched folder, a schedule, a webhook, or an FTP event.

AI components

Agents and assistants are the AI components you interact with and build for. Each one has a defined role, a set of rules, and a scope of access.

Assistant

The earlier name for what is now called a Managed Agent. An assistant is a conversational AI component that operates within defined rules. It is more open-ended than a workflow, but still bound by the business objects it may access, the tools it has, and the outputs it is allowed to produce.

Help assistant (Torque Helper)

A persistent help tool available in the top-right corner of the Torque platform at any time. It answers questions about how Torque works by drawing on ingested Torque guides, Sidekick knowledge, and Syspro 8 business object schemas. It is distinct from Sidekick and does not execute tasks.



Syspro Torque includes the Syspro 8 business object schemas out of the box. If you need schemas for another Syspro version, Syspro can load them on request.

Managed Agent

A configured AI agent built for a specific business role. Each managed agent has a defined system prompt, behaviour instructions, capability layers, and guardrails that scope it to the business objects and data it is allowed to access. Managed agents can be called directly by a user or delegated to by Sidekick.

Sidekick

The orchestrator agent in Torque. Sidekick interprets a user's request, determines the right managed agent or workflow to handle it, and delegates accordingly. It does not build and users who try to create something through Sidekick are directed to Torque Builder instead. Sidekick is available within the Torque platform and is being integrated into Syspro Web UI (Avanti).



Embedded Sidekick requires **Syspro 8 2026 R1** or later.

Sub-agent

A managed agent called by another agent or as a step within a workflow, rather than being invoked directly by a user. Sub-agents handle a specific part of a larger task.

FOR EXAMPLE:

A stock planner sub-agent and a requisition creator sub-agent can both be called by a sales order agent as part of a single order processing workflow.

Torque Builder

The agent that builds Torque artefacts, such as workflows, managed agents, and MCP configurations using natural language. A user describes what they need; Torque Builder asks clarifying questions (in planning mode), proposes a plan, and builds on approval. Torque Builder is guardrailed to Torque artefacts only and will not write arbitrary scripts or code outside that scope.

AI connectors

Connections, executors, and schemas are the infrastructure that gives AI agents access to the data and systems they need to act on.

Business object

Business objects are portions of Syspro business logic that can be called programmatically from outside of Syspro, passed instructions in XML, and return the results in XML (updating the database, if required).

They are COM-based components that allow third party developers to access the rich functionality of the Syspro core product. Each third party application typically uses a number of e.net Business Objects that are licensed at functional area level. Functional areas are merely a grouping of business objects.

For AI integrations, this is the Syspro service through which Torque reads from and writes to Syspro. Torque communicates via business-object (WCF / e.net) services rather than writing to the database directly. Each workflow and managed agent is scoped to only the specific business objects it has been permitted to use.

Business object schema

This is the structural definition of a Syspro business object and includes fields, data types, and relationships.

For an AI integration, these are loaded into Torque so agents understand the data they are working with. Torque includes the Syspro 8 schemas out of the box; schemas for other versions can be uploaded if needed.

Connector

The integration type selected when creating a connection, e.g. SQL Server, FTP/SFTP, Slack, or Salesforce. New connector types are added to the platform regularly.

Connection

A configured link between Torque and an external system, e.g. a SQL Server database, Syspro WCF service, or FTP/SFTP server. Each connection is set up with the target system's credentials and scoped to a specific executor. Connections can be restricted to query-only, or permitted to query and post.

Executor

A Windows service installed on the customer's server that acts as the bridge between Torque's cloud platform and the local Syspro instance, SQL database, and file system. Without the [Syspro Torque Executor](#), Torque cannot read from or post to an on-premise Syspro environment.

MCP/MCF Bundle

MCP (Model Context Protocol) is a standard that exposes API endpoints as callable tools that an AI agent can use. Torque can connect to external MCP servers that are reachable over HTTP or SSE, such as GitHub, Jira, or Notion, and also provides its own MCP bundle, which gives external LLMs direct, scoped access to Syspro data.

Registration token

The one-time credential that links an executor to a tenant. This is generated in the Torque admin portal, and then supplied during executor installation.



The token is only valid for one hour, so coordinate the install to ensure it doesn't expire before registration.

Schema snapshot

A point-in-time record of a connected database's structure, i.e. its tables, views, stored procedures, and columns, captured so Torque understands the specific schema it is working with, including any custom tables. A snapshot records structure only, not data.

Tag

A label applied to an executor to control how connections and workloads are routed. Tags are optional when a tenant has a single executor, but become important when running more than one. The platform distributes work across executors that share a tag.

Tenant administration

This explains tenants, roles, plans, and usage settings that control who can access Torque, what they can do, and how much of the platform they can consume.

Break Glass Access

Access to customer conversation data is tightly controlled. Every access goes through a single audited gateway that applies PII redaction and consent controls, and every access is written to tamper-evident records. Emergency ("break-glass") access is time-limited, requires a documented reason, raises an immediate alert to Syspro platform operations team, and enters an independently reviewed queue. No Syspro employee has open, unlogged access to your conversations.



Break-glass access does not currently notify you at the time it happens – the alert and the review are internal to Syspro. Direct customer notification is on our roadmap. If your compliance process requires it, raise this with your account team so the access records can be shared with you on request.

PModel Tier

Managed Agents are assigned an abstract capability tier – Fast, Small, Medium or Large – rather than a named model. Syspro evaluates, approves and maintains the underlying models centrally, so you benefit from improvements without having to manage model choices yourself. Choose a higher tier for work that needs more reasoning, and a lower tier for high-volume, simpler tasks. If your organisation needs a specific named model, your Syspro contact can enable it for your tenant.

Subscription plan

The subscription tier assigned to a tenant, which determines its monthly token allocation. The plan is set when the tenant is created and can be changed by a tenant admin. Higher tiers carry a larger token allowance and current options include:

- Starter
- Professional
- Enterprise

Roles

Access levels that determine what a user can do in Syspro Torque. A tenant admin assigns roles when inviting users, granting the access each job requires. The following roles and access levels are available:

- • Viewer – read-only access
- • Editor – can build and modify workflows and Managed Agents
- • Manager – Editor access, plus managing teams, assigning resource permissions, sharing connections, and seeing execution history across the tenant
- • Tenant Admin – full access, including inviting and managing users

Tenant

An isolated Torque environment provisioned for one company. Each tenant has its own users, plan (which determines the monthly token allocation), connections, managed agents, and workflows. A single Torque user (e.g. a consultant or partner) can be a member of multiple tenants.

Tenant Admin

The role that administers a tenant. A tenant admin invites and manages users, sets up connections, controls which business objects, workflows and managed agents may post to, and generates the registration token used to install an Executor.

Token

The unit of AI usage that a plan allocates each month. Token consumption covers workflow executions, agent sessions, and AI messages; more complex tasks and longer conversations draw down more tokens. Usage resets monthly, and notifications can be configured as the limit approaches.

Starting

Prerequisites

Setup Options

To use this feature, the following setup option(s) must be enabled/defined:

Artificial intelligence

Setup Options > System Setup > Artificial Intelligence

AI endpoint

The URL of the Torque API for your region. Your account team provides the exact value for your tenant during onboarding.

Once this is specified, the [Syspro Torque](#) agent widget can be hosted in the [Syspro Web UI \(Avanti\)](#).

AI secret

This indicates the client secret that authenticates the AI platform with your AI API. This value is obtained from the [Syspro Torque portal](#).

AI tenant ID

This indicates your tenant ID that identifies your organisation within the AI platform. The tenant ID can be retrieved from the [Syspro Torque portal](#).

Hardware specifications

The [Syspro Torque Executor](#) is a Microsoft Windows service that runs on a server inside your network. Its resource footprint scales with the number of workflows running concurrently.

Operating system

- **Recommended**
Windows Server 2022
- **Supported**
Windows Server 2019 or later, or Windows 10 version 1809 or later (64-bit)
- **Minimum**
Windows Server 2016 and later.



The [Syspro Torque Executor](#) is delivered as a Microsoft Windows installer and runs as a Microsoft Windows service. Linux is not supported.

Runtime

The [Syspro Torque Executor](#) runs on .NET 10.

You don't need to install this yourself. The installer downloads and installs the .NET 10 ASP.NET Core Hosting Bundle automatically (approximately 80 MB), if not already present. Internet access on the server is required during installation.

Hardware

The *Syspro Torque Executor* runs up to 4 workflows concurrently by default, each in a memory-capped sandbox.



One slot is reserved for interactive agent requests, scheduled and batch work uses the remaining three.

Resource	Minimum	Recommended
CPU	2 cores (64-bit / x64)	4 cores
RAM	2 GB free	4 GB or more
Disk	2 GB free (install + runtime state + logs)	5 GB or more

Memory



At default settings, workflow sandboxes are capped at approximately 1 GB of peak memory usage combined, plus a few hundred MB of runtime overhead. This accounts for the 2 GB minimum, and 4 GB gives comfortable headroom. If the *Syspro Torque Executor* runs on a shared server or you plan to increase the concurrency limit, size RAM accordingly and confirm the target with your Syspro contact.

Disk locations

What	Where
Program files	C:\Program Files\SYSPRO\Torque Executor\
Runtime state (credentials, keys, logs)	%ProgramData%\SYSPRO\Torque Executor\
Log files	%ProgramData%\SYSPRO\Torque Executor\logs\



Log files are written to %ProgramData%\SYSPRO\Torque Executor\logs\. The base file is `executor.log`, and the log rolls at 10 MB into numbered files (`executor1.log`, `executor2.log`, and so on), keeping the 14 most recent. Because the numbered files are reused in rotation, sort the folder by date modified to find the file currently being written.

Runtime state is stored outside Program Files, so it survives upgrades and reinstalls. The service runs under the built-in LocalSystem account.



If your servers use a hardening policy, ensure LocalSystem retains write access to the %ProgramData%\SYSPRO\Torque Executor\ folder.

Privileges

- Installation requires a local administrator account on the server.
- Generating the registration token in the [Syspro Torque](#) UI requires the TenantAdmin role. The token is valid for one hour, so coordinate the install to avoid expiry.

Deploying

[Syspro Torque](#) has two components, of which only one runs on your infrastructure:

- [Syspro Torque](#) Cloud (the platform, web UI, and AI services) is managed and hosted by Syspro in [Microsoft Azure](#).
- [Syspro Torque Executor](#) (the bridge to your on-premises systems) is a Windows server inside your network that is managed by you.



[Syspro Torque Executor](#) 0.1.90.0 or later is required for the downloadable diagnostics bundle.



Users access [Syspro Torque](#) through a web browser, i.e. nothing is installed on user machines. The only component requiring installation by your IT team is the [Syspro Torque Executor](#), which lets [Syspro Torque](#) reach your Syspro instance, Microsoft SQL Server, and file systems without exposing them to the internet.



Recommended [Syspro Torque Executor](#) placement: a dedicated or lightly loaded host on the same LAN segment as Syspro and SQL Server, patched and hardened to your ERP standard.

Browser requirements

No client software, plugins, or extensions are required.

- **Recommended**
Current version of Google Chrome, Microsoft Edge, or Mozilla Firefox
- **Minimum**
Any modern, up-to-date, evergreen browser that supports ES2022 JavaScript, WebAssembly, and HTTP streaming
- **Not supported**
Internet Explorer, and legacy or end-of-life browsers



Syspro Torque also runs in modern mobile browsers (iOS Safari, Android Chrome).

Web Assembly

Syspro Torque's interactive data tables and charts (the Canvas) run as a WebAssembly module in the browser. A browser or security policy that blocks WebAssembly will not affect other **Syspro Torque** functionality, but Canvas features will not work.

Authentication

Syspro Torque uses secure managed accounts over OpenID Connect (OAuth 2.0 / OIDC). Users are invited by an administrator and set their own password.



Single sign-on federation (SAML / Microsoft Entra ID) and enforced multi-factor authentication are not available yet, but will be addressed in a subsequent release.

Network requirements

Browser

Syspro Torque streams responses live using long-lived HTTPS connections.

Requirement	Detail
Outbound HTTPS (port 443)	Browsers must reach the Syspro Torque cloud web, API, and identity (sign-in) hosts. Your account team will provide the exact host names for your deployment.
Streaming pass-through	If users sit behind a forward proxy or web filter, it must pass through text/event-stream responses unbuffered. A proxy that buffers responses causes the agent to appear to hang, then dump its full reply at once, and may drop the connection after approximately 5 minutes. Do not apply short idle-connection timeouts to Syspro Torque hosts.
WebSockets	Not required. Only standard HTTP/1.1+ streaming must pass through.

Syspro Torque Executor

Outbound: To the Syspro Torque cloud

The **Syspro Torque Executor** uses an outbound-only model. It initiates all connections outward, to the Syspro Torque cloud and to your local systems. No inbound ports need to be opened on your firewall.

Destination	Port / protocol	Purpose
Syspro Torque Cloud API	443 / HTTPS	Registration, heartbeat (every ~30 seconds), and fetching the details of each task to run.
Syspro Torque Cloud Message Broker	5671 / AMQP over TLS	Receives work and returns results. Connection details are delivered securely by the cloud during registration.

Outbound: To your own systems (on your LAN)

These connections stay inside your network. The *Syspro Torque Executor* must be able to reach:

System	Typical port	Notes
Syspro	e.g. net.tcp on 31001, or the HTTP binding your Syspro WCF services use	Syspro Torque reaches Syspro through its business-object (WCF / e.net) services, not by writing to the database directly. Confirm your Syspro WCF endpoint and port.
SQL Server	1433 / TCP (default)	For direct SQL queries and updates in workflows. Encrypted connections are supported.
FTP / SFTP	Per your server's configuration	For file-transfer polling and delivery, where used.



The installer requires one-time outbound internet access to download the .NET 10 runtime.

If your server has no internet access, contact your Syspro account team about pre-installing the runtime.

High availability and scaling

- **Multiple Executors** can run simultaneously. Work is distributed across them, so if one is saturated the cloud routes to others. This is the recommended approach for adding both capacity and resilience.
- **Automatic reconnect** - The *Syspro Torque Executor* is a Microsoft Windows service that restarts on server reboot and reconnects to the cloud automatically.
- **Tag-based routing** lets you pin sensitive or site-specific connections to a chosen Executor while spreading general load across others.



For a specific high-availability target, e.g. surviving the loss of one server with no interruption, plan the Executor count and tagging strategy with your Syspro account team.

Security

Syspro Torque operates within your existing security framework and honors the controls configured across your system, including:

- Activity restrictions applied to operators using the **Operator Maintenance** program.
- Field-level restrictions applied to operators using the **Operator Maintenance** program.
- Function passwords configured using the **Password Definition** program. When defined, the operator must enter the password before Torque can execute the function.
- eSignature transaction restrictions configured at operator, group, role or company level using the **Electronic Signature Configuration Setup** program. Electronic signatures provide security access, transaction logging and event triggering.
- Program access restrictions assigned to operator groups using the **Operator Groups** program.
- Program access restrictions assigned to roles using the **Role Management** program.



Syspro Torque does not bypass or override these settings. Any action an operator cannot perform directly in Syspro, they cannot perform through **Syspro Torque**.

Restrictions and Limits

- The **Syspro Torque Executor** is delivered as a Microsoft Windows installer and runs as a Microsoft Windows service. Linux is not supported.
- Single sign-on federation (SAML / Microsoft Entra ID) and enforced multi-factor authentication are not available yet, but will be addressed in a subsequent release.

Solving

System messages

Informational messages

Syspro Torque is built for Syspro and business-system work. Each Managed Agent is scoped to the specific business objects, connections and tools it has been granted, so it can only act within that scope. If an agent is asked for something outside what it has been given access to, it will tell you what it cannot reach rather than guess. Treat any answer that is not grounded in your own data with the same care you would give any general-purpose assistant.

FAQs

Foundations and Setup

What is Syspro Torque?

Syspro Torque is an AI platform that automates the work that falls between your systems. It does two things from one place:

- **Automation:** Workflows that run on their own, triggered by a schedule, an incoming message, or a file arriving. No one has to press a button.
- **Sidekick:** A conversational agent you can ask in plain language to look something up, pull a report, or carry out a task on your behalf.



Both run on the same connections and credentials, set up once. **Syspro Torque** sits on top of the systems you already run - Syspro, SQL databases, and external services - and moves work between them.

What is the difference between **Sidekick**, Managed Agents, and Workflows?

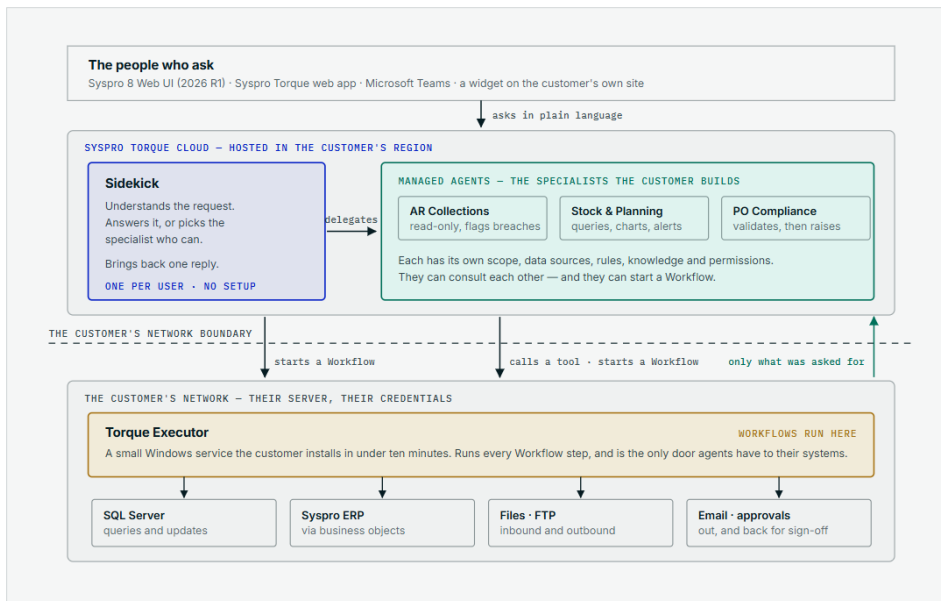
Sidekick, managed agents, and workflows are three parts of **Syspro Torque** that do different jobs. Managed agents monitor, analyse, and recommend, and workflows execute. Both are grounded in the customer's live ERP data and the rules extracted from their own documents, and neither acts outside what its operator is already permitted to do in Syspro.

Sidekick is how everyone reaches the managed agents and workflows. The user asks questions in plain language and Sidekick answers, or brings in whichever managed agent that is required. They never know which specialist exists or which system holds the answer. Approvals, and anything else that needs a person, land back in the same conversation.

In Syspro, this needs no integration work. From **Syspro 8 2026 R1** and later, users on the Syspro Web UI (Avanti) reach **Syspro Torque** through **Sidekick** embedded in the product.

Managed agent	Workflow
■ A configured AI agent built for a specific business role. Each managed agent has a defined system prompt, behaviour instructions, capability layers, and guardrails that scope it to the business objects and data it is allowed to access. Managed agents can be called directly by a user or delegated to by Sidekick.	■ A predetermined, repeatable sequence of steps that Torque executes automatically. Workflows are more structured and deterministic than managed agents. Each step is defined and maps to a visual graph. They are built by Torque Builder or configured manually, and can be triggered by a user, a file arriving in a watched folder, a schedule, a webhook, or an FTP event.
■ Managed agents are grounded in the customer's operation, therefore reasons over their live ERP data and the rules extracted from their own policy documents, never a general-purpose model guessing.	■ Workflows run on-premises on the Syspro Torque Executor, inside the customer's network, reaching anything that server can reach.
■ An agent can only ever act within the access its operator already has in Syspro.	■ It can started by a schedule, a file arriving, a webhook, an inbound message, or an agent that determines it is needed.
■ Managed agents improves when you give it more rules and context to work from, without ever training a model on your data.	■ When an approval step is required it stops the run and routes the decision back into the approver's Sidekick chat to respond before continuing.
	■ Every step, input, and outcome is recorded, and actioned inside the ERP rather than a separate analytics tool.
Managed agents are built by an user with an Editor role, by describing it to Torque-Builder in plain language.	Workflows are built by an user with an Editor role, by describing the process to to Torque-Builder in plain language.
Managed agents are reached via Sidekick . Sidekick delegates to it, or open it directly as its own chat.	Workflows are triggered, or called by an agent mid-conversation.

Where does each part of Syspro Torque run?



The thinking happens in our cloud. The touching of your data happens on your server, through a service you install ([Syspro Torque Executor](#)) and can switch off.

- The conversation runs in the [Syspro Torque](#) cloud. [Sidekick](#) and every Managed Agent reason in Syspro's Azure tenancy, in the customer's assigned region. Conversation content is processed by our AI provider under terms that exclude it from model training.
- The work runs on the customer's server. Every database query, business object call and workflow step executes on the [Syspro Torque Executor](#).
- Nothing is copied, replicated or synced. [Syspro Torque](#) does not bulk-export databases and does not fetch data no tasks has asked for. What leaves the network is the scope of the work the customer asked for, and nothing else.
- Outbound only - no inbound ports. The [Syspro Torque Executor](#) initiates every connection itself, out over HTTPS and AMQP-TLS. No inbound firewall openings, no exposed endpoint. Its only listener is a setup page bound to localhost on that server.

Do I need to be technical to use it?

No. You describe what you want in plain English, and the [Syspro Torque](#) Builder drafts the workflow or Managed Agent for you. Business users work through [Sidekick](#) and the visual builder; your IT team handles the one-time setup of connections and the on-premises [Syspro Torque Executor](#).

Who is Syspro Torque for?

Manufacturers and distributors who lose time to manual data movement, one-off lookups, and approvals and notifications that someone has to trigger by hand. If your systems don't talk to each other, [Syspro Torque](#) is the layer that connects them.

What does it take to get started?

A short onboarding: your [Syspro Torque](#) tenant is created, your IT team installs the on-premises [Syspro Torque Executor](#) (a guided, one-time setup), and you connect [Syspro Torque](#) to your systems - typically your Syspro business objects and any relevant SQL databases. From there you invite your team and start building.



Syspro business objects credentials should be a dedicated operator account, not an administrative account.



Most pilots are set up and connected in a single working session.

Where should the Syspro Torque Executor be installed?

Install the [Syspro Torque Executor](#) on a Windows server inside your network that can reach your Syspro application server and SQL Server, and has outbound HTTPS access to the [Syspro Torque](#) cloud.

- Put it close to Syspro and SQL Server on the same LAN segment where possible.



The [Syspro Torque Executor](#) communicates with those systems constantly; low-latency local access matters.

- Use a dedicated or lightly-loaded server. The [Syspro Torque Executor](#) is an always-on background service. It can share a server with other workloads, but size RAM accordingly.
- Co-location with Syspro or SQL is allowed but not required.



The only hard requirement is network reach-ability to those systems and outbound HTTPS to the cloud. A separate integration or utility server works equally well.

- Multiple sites: install more than one [Syspro Torque Executor](#) and use tags to route specific connections to specific [Syspro Torque Executor](#)s.

FOR EXAMPLE:

, There could be one [Syspro Torque Executor](#) per plant or region. The cloud distributes work across [Syspro Torque Executor](#)s that share a tag .



Executors are not updated automatically. New functionality are added with each [Syspro Torque Executor](#) release. To update your current installer, go to **Admin > Executors > Download installer**. It upgrades in place and keep existing configuration and cloud region. New functionality will only be active after you reinstalled it.

A list of product changes can be viewed under [Syspro 8 2026 R1 List of Program Changes](#).

What can I build with it?

There are five capability areas, all from the same platform:

Capability	What it means for you
Build Your Own	Managed Agents and automations shaped to your roles and processes, not generic templates.
Teaching <i>Syspro Torque</i> Your Business	Give an agent your context and rules so it applies them automatically.
Conversational Access	Ask questions of your own data in plain language and get answers back.
Run & Integrate	Unattended workflows that connect your systems and run without supervision.
Insight on Demand	Live tables and charts rendered right inside a conversation.

Data, privacy, and trust

Where is our data stored?

Your data is stored in Syspro's Azure tenancy in your assigned region. The AI models themselves are a separate matter: agent conversations are currently processed by Anthropic's API, and Microsoft Azure AI is used for supporting functions such as document and schema indexing. Conversation content is therefore sent outside Azure to a third-party AI provider.

Is our data isolated from other customers?

Yes, and it is isolated by design at three independent layers:

- **Database:** Every customer's records are separated by tenant-level filtering enforced at the data layer, so one customer's queries can only ever see their own data.
- **Messaging:** Each customer gets a dedicated message-broker virtual host with its own credentials. Cross-customer message flow is impossible at the infrastructure level, not just in application code.
- **Encryption:** Each customer's secrets are protected with per-tenant encryption keys.



Customer-managed encryption keys (BYOK) are not supported at this stage, and keys are not shared across regions.



No customer's data is visible in another customer's environment.

Do you train the AI model on our data?

Syspro does not train models on your data. **Syspro Torque** runs on leading enterprise AI providers (currently Microsoft Azure and Anthropic), and our AI providers' terms exclude customer data from model training. Because this rests on our AI providers' contractual terms, ask your account team or the Syspro AI enablement team for the current, written data-handling commitment before you rely on it in your own compliance review.

Are third parties involved in processing our data?

Syspro Torque's AI runs on leading enterprise AI providers – currently Microsoft Azure and Anthropic. When an agent answers a question, the content of that conversation is sent to the AI provider to work out which action to take. Where a task requires the agent to reason over data retrieved from your systems – for example, summarizing an order book or explaining an exception – that data forms part of the conversation content and is sent to the AI provider as well. Our AI providers' terms exclude this content from model training..



For the current list of sub-processors and the formal data-processing terms, contact the Syspro AI enablement team.

Break Glass Access

Access to customer conversation data is tightly controlled. Every access goes through a single audited gateway that applies PII redaction and consent controls, and every access is written to tamper-evident records. Emergency ("break-glass") access is time-limited, requires a documented reason, raises an immediate alert to Syspro platform operations team, and enters an independently reviewed queue. No Syspro employee has open, unlogged access to your conversations.



Break-glass access does not currently notify you at the time it happens – the alert and the review are internal to Syspro. Direct customer notification is on our roadmap. If your compliance process requires it, raise this with your account team so the access records can be shared with you on request.

How is our data protected in storage and in transit?

Data at rest is protected by Azure-managed database encryption plus an envelope-encryption scheme for secrets and credentials, with the master keys held in a hardened key vault. Traffic between your browser, the **Syspro Torque Executor**, and the **Syspro Torque** cloud is encrypted in transit. Your IT team can find the connectivity specifics in the **Syspro Torque** System Requirements document.

Can we export or delete our data?

Yes. **Syspro Torque** supports exporting your tenant's data and erasing it on request, in line with data-protection obligations. Erasure operates at the level of your whole tenant. For a specific data-subject request or a formal export, contact your account team so it can be handled correctly.

Is Syspro Torque certified (SOC 2, ISO 27001)?

Syspro maintains a security and compliance program. For current certifications, their scope, and formal security documentation, request the latest security pack from your account team or the Syspro AI enablement team - certifications and their coverage change over time, so we prefer to point you to the authoritative source rather than restate it here.

Accuracy and AI behavior

How accurate is it? Does it make things up?

Syspro Torque is built so the AI doesn't answer from memory. The AI's job is to choose the right action and fill in its parameters - it does not invent the numbers. The actual figures come from live queries against your own Syspro and SQL data, executed deterministically in an isolated environment. The same request against the same data gives you the same result.



Anything the AI writes as a workflow is validated before it runs, then executed step by step in a controlled sandbox - so an automation behaves predictably every time, not differently on each run.

Can I see how it reached an answer?

Yes. Every answer can be traced to the exact business object or query it called and the data that came back. **Syspro Torque** records the AI's reasoning steps and tool calls so you can open a response and see what it actually did, rather than taking the answer on faith.

Do you publish an accuracy percentage?

No. A single headline number doesn't tell you much about your workflows on your data. The stronger guarantee is architectural: answers are grounded in live queries against your own systems, and every answer is traceable to its source. .



You can rate every response, and that feedback feeds directly into how we improve the product.

What happens if the AI is unsure or gets something wrong?

Automations can include an approval or preview step, so a person confirms before anything is committed. previewing a batch of changes before they are applied.



For conversational answers, the traceability lets you check the source in seconds. You can flag any response, which will route into our quality process.

Which AI models does Syspro Torque use?

Syspro Torque runs on leading enterprise AI models from Microsoft Azure and Anthropic. The platform is model-flexible – Sysproselects and manages the approved models centrally, so you benefit from improvements without having to manage model choices yourself.

General

What's the difference between Sidekick and Torque-Builder?

Torque-Builder is the engine room where automation is built, and **Sidekick** is where you drive them once they exist.

Environments	Description
Sidekick	Sidekick is the place you use Syspro Torque day-to-day. You ask it something in plain language and it either answers directly or pulls in a specialist managed agent behind the scenes and brings the results back in one reply. It runs workflows on your behalf, answers questions, opens results, and delegates to specialists. All users with a Viewer role have access to it. Sidekick is personal to you and keeps context within a conversation, so you can ask follow-up questions without repeating yourself. Your conversation history is saved, and you can reopen an earlier chat at any time. Sidekick does not build things directly, however it will point you to Torque-Builder if required.
Torque Builder	Torque-Builder is the authoring tool, the place where you create things. You describe a managed agent or a workflow in plain language and the builder constructs it, asks clarifying questions, and proposes capabilities for you to review and apply. Only users with an Editor role have access to it.

How do I get help inside the product?

- Open the **Help Assistant (Torque Helper)** from anywhere in the platform by clicking on the question mark icon. It slides open from the side, so it does not disrupt your current chat.



A persistent help tool available in the top-right corner of the Torque platform at any time. It answers questions about how Torque works by drawing on ingested Torque guides, Sidekick knowledge, and Syspro 8 business object schemas. It is distinct from Sidekick and does not execute tasks.

- Ask a how to question, for example, "How do I configure a SQL connection to Syspro?".
- Follow the returned steps and tips. Use previous chats in the panel to revisit earlier answers.



The help assistant draws on the product knowledge base, which is refreshed regularly.

What's the difference between **Syspro Torque** and AI Assistant?

Syspro Torque and AI Assistant are both Syspro AI offerings, but they sit in different places, serve different purposes, and fall under different commercial models.

AI Assistant is the original AI tool set built into the product and sits within the ERP and subscription, while **Syspro Torque** is a fundamentally different offering, a separate cloud platform.

Syspro Torque is a cloud-first, no-code platform embedded in Syspro that understands your business data, business objects, and workflows. Its guided library of pre-built AI Assistants and AI agents, together with powerful tools for creating and deploying custom AI solutions, enables organizations to automate tasks, accelerate decision-making, and augment day-to-day operations with consistent, context-aware AI.

The **Syspro Torque** widget brings AI directly into the **Syspro Web UI (Avanti)**, giving users seamless access to intelligent assistants, agents, and insights within the context of their daily tasks, making AI a natural extension of the Syspro experience.



The **Syspro Torque** widget integrating **Sidekick** into **Syspro Web UI (Avanti)** requires **Syspro 8 2026 R1** or later.

Where AI Assistant works inside Syspro, **Syspro Torque** sits across the systems you run, connecting Syspro, SQL databases, file systems, and external services, and moving work between them.

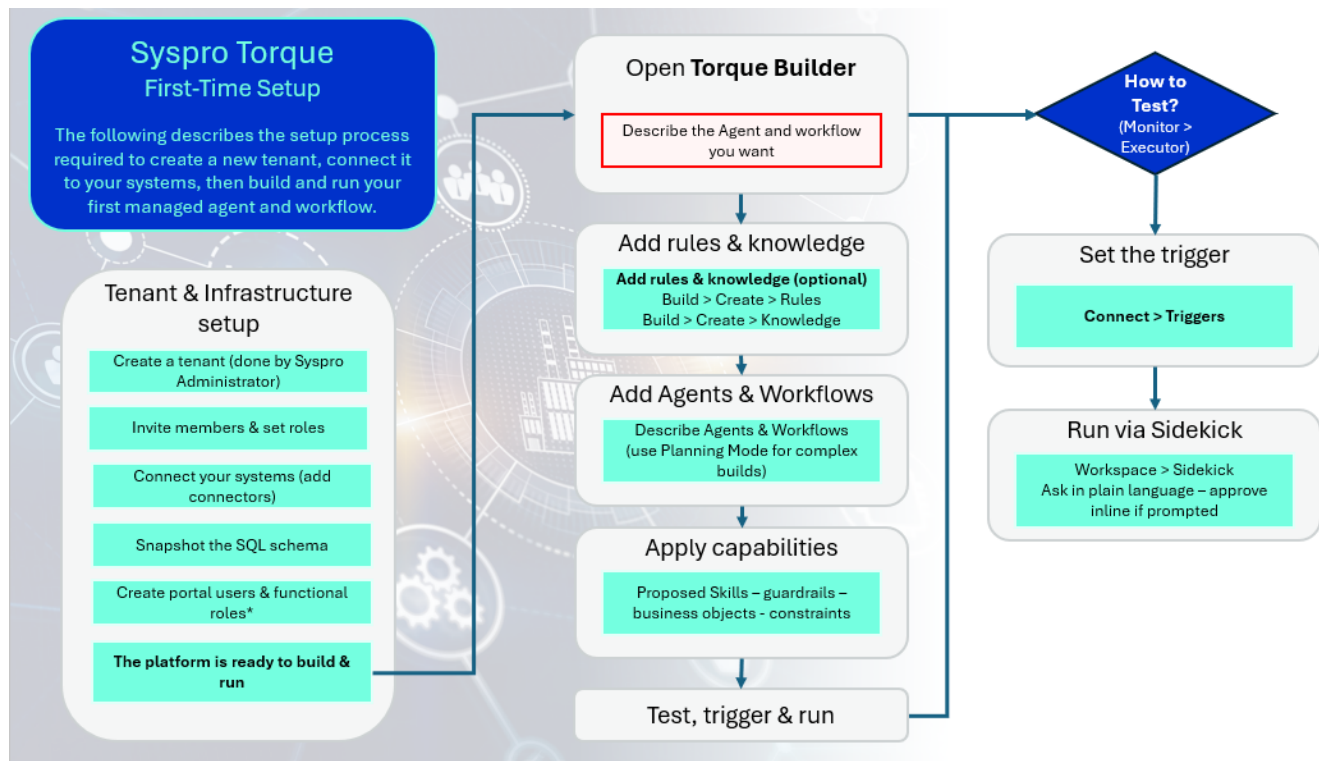
My session has expired. How do I re-authenticate again?

- Ensure you have a valid tenant and user account.
- Ensure you entered the correct password (use Forget password on the sign-in page if you do not have it).

When you see the **Session expired - attempting re-authentication** message, **Syspro Torque** is trying to restore your session automatically.

- Wait a few seconds and let it complete, then refresh the page.
- If you are not signed back in, sign out of and sign in again with your email and password.
- If the page is still blank or shows an error after signing in, clear cookies for the domain only, then sign in manually.

Using Process



Tenant and Infrastructure setup Create a tenant

Syspro Administrators creates the tenant on the customer's behalf. The tenant and its first tenant administrator (TenantAdmin) are created together.



The TenantAdmin will receive an email with a log in link. This Invite Link is valid for 7 days by default. If an user doesn't accept it immediately it can be resent by selecting the **Copy Invite Link** hyperlink from the TenantAdmin name under **Admin > Platform > Users**.

Add members to your tenant

- To add users to your tenant, go to **Admin > Members**.



Within the **SYSPRO TORQUE ADMIN** portal you can add users under **Admin > Platform > Users** or within **Syspro Torque** you can add users under **Admin > Members**.

In **Syspro Torque**, users and members refer to the same thing - they're interchangeable terms for people who have been invited to and have

-  access to your tenant.
Only TenantAdmin's can create and manage users.
- For each person, enter their email, and optional display name, and a starting role.
- Choose one of the required role:
 - • Viewer – read-only access
 - • Editor – can build and modify workflows and Managed Agents
 - • Manager – Editor access, plus managing teams, assigning resource permissions, sharing connections, and seeing execution history across the tenant
 - • Tenant Admin – full access, including inviting and managing users
- Roles are cumulative and each includes everything below it.
- Click **Add Member** to send the invitation. If the person already has a [Syspro Torque](#) account they are added directly, if not, [Syspro Torque](#) creates the account and emails a one-time setup link (valid for seven days).



Within [Syspro Torque](#), under **Admin > Members**, there is no resend invitation button. If a welcome email does not arrive, confirm the address and check spam, if needed, remove and re-add the member to trigger a fresh email.

- The invitee select **Set up your account**, sets a password, and sign in on the Home Dashboard (<https://torque.sysprocloud.com>)
- TenantAdmin's can adjust users later from the same page, change a role from the **Roles** drop-down, deactivate (platform wide), remove (from the current tenant), or set per-category domain permissions.

Link Syspro Torque to your on-premises systems

Install and register the Syspro Torque Executor

You install the [Syspro Torque Executor](#) to link [Syspro Torque](#) cloud to your on-premises systems. It runs as a Windows service on a server inside your network. Until a [Syspro Torque Executor](#) is online, workflows and managed agents cannot reach any on-premises data. The [Syspro Torque Executor](#) connects outbound only and opens no inbound ports.



The [Syspro Torque Executor](#) must be installed and registered before starting to use [Sidekick](#) and [Syspro Torque](#).



Executors are not updated automatically. New functionality are added with each [Syspro Torque Executor](#) release. To benefit from the latest release ensure to renew **Executors** regularly.

To set up the [Syspro Torque Executor](#), you must first create a registration token:



To generate a registration token you will need the TenantAdmin role.



To install and register the *Syspro Torque Executor*, you will need access to the machine (Windows server or local host) where Syspro is installed, to identify the *Syspro Torque Executor*.



If the server uses an authenticating outbound proxy, set a WinHTTP proxy with `netsh winhttp set proxy...` before you install.

- Go to **Admin > Infrastructure > Executors** and click **+Create Token**.
- Give the **Executor** an identifiable name (for example, warehouse-executor-01).
- Add one or more comma-separated tags. Tags are optional for a single **Executor**, but drive tag-based routing once a tenant has more than one.
- Click **Create Token**.



The registration token is valid for one hour after it is generated, so coordinate the install so it does not expire.

Next, install and register the *Syspro Torque Executor*:



Most tenants use a single *Syspro Torque Executor*, but you can run several, for example one per site or environment, and route specific connections to specific **Executors** by Tags. The cloud balances work across **Executors** that share a Tag.

- From the **Create Token** screen, choose an install method.
 - Manual install: Click **Download installer** and save **TorqueExecutorSetup.exe** to the server.

Run the downloaded installer as a local administrator. It installs the *Syspro Torque Executor* service to `C:\Program Files\SYSPRO\Torque Executor\`, sets the local UI port, and installs .NET 10 if missing, then registers and starts the *Syspro Torque Executor* service.



The installer installs the .NET 10 ASP.NET Core hosting Bundle (about 80 mb) if it is not already present, downloading it from Microsoft at install time. Internet access on the server is required only for that download.

When the manual installer finishes, choose to go and register the *Syspro Torque Executor*.

Open the *Syspro Torque Executor* UI in your browser (for example, `http://localhost:5210/`), copy the registration token, and paste it in, and select **Register Executor**.

- □ Quick install: Click **Copy script**.

Paste it into an elevated PowerShell window. It downloads the installer, verifies its SHA-256-hash, sets the token, installs, and registers in one step.



Recommended **Syspro Torque Executor** placement: a dedicated or lightly loaded host on the same LAN segment as Syspro and SQL Server, patched and hardened to your ERP standard.



Executors are not updated automatically. New functionality are added with each **Syspro Torque Executor** release. To update your current installer, go to **Admin > Executors > Download installer**. It upgrades in place and keep existing configuration and cloud region. New functionality will only be active after you reinstalled it.

- After registering your **Executor**, you will have to restart the **Syspro Torque Executor** service (`TorqueExecutor`) again to establish a connection to your local host or Windows server (depending on where you have installed the **Executor**)
- Go back to **Syspro Torque Admin > Executors** and confirm the **Executor** shows **Online** within about 60 seconds.



If the **Syspro Torque Executor** does not show **Online**, restart the **Syspro Torque Executor** service (in `services.msc`, or run `Restart-Service -Name "TorqueExecutor" - Force` as Administrator) and allow one or two minutes for it to reconnect.



From the **Executor** entry you can later re-register, download the installer, restart, or revoke it. Revoking deletes the token and requires re-registration.

- Once your **Syspro Torque Executor** has been installed and registered you can start configuring connections.

Connect your system

You create a connection to link **Syspro Torque** to the system(s) it must work with. Various connections can be created. You must create the connection first, then configure its credentials per environment.

You require a TenantAdmin or Editor role.



Ensure the **Syspro Torque Executor** is showing **Online** in order to reach the target system (i.e., SQL Server, or Syspro application server)



Ensure you have the SQL details (host, database, login) and/or Syspro WCF details (endpoint URL, binding, operator code and password, company code) readily available.

How to setup a SQL connection

A SQL connection query a database directly.

- Go to **Connect > Connections > Manage > New Connection**.
- Name it, select the **SQL Server connector**.
- For a Syspro company database, set the **Schema catalog** to Syspro so the agent gets curated schema discovery tools.
- Optionally, set **Executor** Tags to restrict routing, then click on **Create Connection**.
- The connection will appear in the **Manage** list. Next, you must start to configure it. Select **Configure**.
- Enter server, database, user, and password. For a Syspro database also enter the Syspro system database (DDS), typically **Syspro8db**.
- Click **Save credentials**, then **Test connection** (this is only active after saving)
- A green **Connection successful** message confirms it.

How to setup a Syspro WCF connection

A Syspro WCF connection calls business objects through Syspro's business logic layer, so rules, validation, and posting rules apply.

- Go to **Connect > Connections > Manage > New Connection**.
- Name it, select the **Syspro WCF connector**.
- Set **Executor** Tags if needed.
- Click on **Create Connection**.
- On the detail page, enter the endpoint URL, binding (BasicHttp, NetTcp, or WsHttp), operator code and password, and the company code, then select **Save credentials** and **Test Connection**..



The test uses the saved values rather than what is currently on screen, so save first – the button stays disabled while the form has unsaved changes. Testing requires Write access to connections, a selected environment, and at least one online executor whose tags match the connection.

- Capture a schema snapshot of the SQL connection so *Syspro Torque* records your tables, views, procedures, and columns. Snapshots are listed under **Monitor > Insights > Snapshots** and captures structure only, not data.



Use a dedicated Syspro operator account for *Syspro Torque* rather than a personal login, to make activity easier to audit and revoke.



Various other connectors are available under the same **New Connection** dialog (HTTP APIs, FTP/SFTP, Office365, and more); this list will expand over time.

Build agents, workflows, rules, and knowledge (Torque-Builder)

Use *Torque-Builder* to create managed agents and workflows from a plain language description. Supplying rules and knowledge first gives the *Torque-Builder* better source material. You review and apply what the *Torque-Builder* proposes before anything takes effect.

Create rules

Rules are re-usable business-logic checks that live in your tenant and run at runtime. You create them once in the **Rules catalog**, and a workflow or managed agent applies them when it actually runs. A workflow calls them through a validation step, and an agent through a rule set layer. **Rules** are part of what your automation does every time it executes.



Rules are optional, but recommended. Rule sets group rules inside the catalog panel on **Build > Rules**.

- Go to **Build > Create > Rules**
- Two options exist to add rules:

Extract rules from a document by uploading a document using the attachment button.

- The **Rules Agent** will review and propose rules in the chat. It will display all the rules in the chat, state what rule type is chosen, and (for SQL rules) which database table it verified against.
- Confirm, edit, or reject each rule. The agent will save confirmed rules to the catalog immediately.

Describe a rule in plain language using the chat mode.

- The **Rules Agent** picks the appropriate rule type, writes the rule logic, and (for SQL rules) verifies the required database table and columns before saving.
- **Rules** will appear in the right-hand catalog pane.



You do not need to specify rule types, table names, or field names. The agent discovers these from your connected databases. Only describe the business intent.

- Some rules might be flagged for review (indicated by a review indicator) as they couldn't be fully verified. The **Rules Agent** will tell you why and what to action.

- To view a rule's full definition, click on the rule in the right-hand catalog pane under **Rule Catalog**. You might need to collapse **Insights** first in order to see all the rules.



Toggle the **Active** button to deactivate (soft-delete) the rule without removing it from the audit trail. Use **Delete** only when you want to remove it permanently.



Rules are grouped by **Rule Sets**. You can create additional rule sets to organize rules by domain, source document, or workflow.

Create a knowledge base

The **Knowledge Base** gives your **Managed Agents** a structured understanding of your organization, your industry, the challenges your business solves, how your team works, and how **Syspro Torque** integrates with your systems. When a **Managed Agent** answers a question or takes an action, it can draw on this context to give more relevant, grounded responses.

The **Knowledge Base** has two parts:

Structured sections describe who your organisation is and how it operates – your industry, the problems your business solves, how your teams work, and how **Syspro Torque** fits your systems. Your administrators maintain these, and every Managed Agent in your tenant can draw on them.

Knowledge collections hold documents you upload (.txt and .pdf). Each document is indexed so Managed Agents can search it and cite it when answering, and each shows its processing status. Bind a collection to a specific Managed Agent with a Knowledge Base capability layer to control which agents see which documents.

- Go to **Build > Knowledge**
- Update the structured sections that describe your organization.



Be specific. For example, 'We manufacture precision automotive parts and serve Tier 1 OEM suppliers in Europe. The more context you provide, the more relevant the **Managed Agent's** responses will be.



Keep the **Knowledge Base** current as your business and integrations evolve. It directly affects the quality and relevance of every Managed Agent in your tenant

Create a managed agent

A **Managed Agent** is a purpose-built AI that answers questions, runs actions, and automates tasks within a defined scope.



Only users with the **Editor** or above (TenantAdmin) role can create managed agents.



Ensure you have an installed and registered **Syspro Torque Executor**. **Workflows** run on-premises therefore the **Syspro Torque Executor** must be installed and registered before creating workflows. **Connections** must also be set up prior to creating workflows.

There are two ways to start building a managed agent:

- Use the **Torque-Builder** (**Build > Torque builder**) and describe the managed agent you want. **Torque-Builder** creates it for you and takes you to the managed agent builder page.
- Go to **Build > Managed Agents**. Create a named shell, and describe its capabilities in the chat panel.

Describe what the Managed Agent should do

In the **Torque-Builder** or **Managed Agents** builder chat panel, type in plain-language what the agent's purpose is. The builder reads the description and configures the agent's system prompts and capabilities. It will show you what it proposes before anything takes effect.



The more specific you are about what the **Managed Agent** should and should not do, the less back-and-forth is needed.

FOR EXAMPLE:

Minimal prompt

'Create an agent for the sales team.'

This prompt will work, but the builder will ask you more questions.

Better

'Create an agent for the sales team that can look up customer account status, check open sales orders, and tell them if a customer is over their credit limit Connect it to Syspro'.

This adds the roles, scope, and data source.

Best

'Create a read-only AR agent for the credit control team. It should answer questions about customer balances, credit limits, and overdue invoices using Syspro business object calls. It should not post transactions or modify any data. If a customer is over their credit limit, it should flag this clearly.'

This adds the role, scope, data source, behavior and boundaries.

As you describe the Managed Agent, the builder proposes capabilities in a **Proposed Skills** panel on the editor page rather than applying them immediately. Review each item, then select **Apply** to add it to the **Managed Agent**.

Test the Managed Agent

- Go to **Build > Managed Agents**
- Find your Managed Agent and click **Open Chat**.
- In the session picker, select your **Managed Agent** from the **All managed agents** drop-down or in the chat panel select **Choose a different managed agent**.
- Send a few representative questions, for example, the kind of things your users will actually ask.
- If the response are wrong or incomplete, return to the Managed Agent's editor page and continue the conversation in the builder chat panel.

Make the Managed Agent available

By default, a new **Managed Agent** is active and visible to users in your tenant (subject to their access). If you want to restrict who can see or use it, configure access permissions under **Access Management** on the Managed Agent's editor page to limit visibility to specific users or teams.



For a complex Managed Agent, turn on **Planning Mode** (the checklist icon in the chat) in the **Torque-Builder** chat before your first message so the builder proposes an approach and waits for sign-off.

The **Planning Mode** checklist icon is only available in the **Workflow** chat (**Build > Workflows**), **Torque-Builder** chat and the **Rules** chat (**Build > Rules**). It is not available in the **Managed Agent** builder chat or in **Sidekick**.

Create a workflow

A **workflow** is an automated multi-step process that runs on your on-premises systems, querying databases, calling business objects, sending notifications, waiting for approvals, and more. **Workflows** run on the **Syspro Torque Executor**, not in the cloud, so they can reach any system where the **Syspro Torque Executor** was installed.



Only users with the **Editor** or above (TenantAdmin) role can create workflows.



Ensure you have an installed and registered **Syspro Torque Executor**.

Workflows run on-premises therefore the **Syspro Torque Executor** must be installed and registered before creating workflows.

Connections must also be set up prior to creating workflows.

There are two ways to start building a workflow:

- Use the **Torque-Builder** (**Build > Torque builder**) and describe the workflow you want. **Torque-Builder** creates it for you and takes you to the workflow builder page. This approach is faster if you know your workflow.
- Go to **Build > Workflows**. Create a named workflow, and describe the process in the chat panel docked on its builder page.

Describe the workflow

In the [Torque-Builder](#) or **Workflows** builder chat panel, type a plain-language description of the process you want to automate. The builder reads your description, selects the step types, verifies the required schema against your connected systems, and writes the workflow. It will show you what it built and flag anything it requires confirmation.



The more precise you are about data sources, conditions, and edge cases, the fewer questions the builder asks. Aim to include the trigger, the data source, the steps, the conditions, and the boundaries.

FOR EXAMPLE:

Minimal prompt

'Build a workflow that sends overdue invoice reminders.'

This prompt will work, but the builder will ask you more questions.

Better

'Build a workflow that queries overdue invoices from Syspro, filter for balances over \$500, and sends an email reminder to each customer's contact on file'.

This adds the data source, a condition, and the outcome.

Best

'Build a workflow that runs nightly. It queries the [ArTrnDetail](#) table for invoices more than 30 days overdue with a balance over \$50. For each customer, it sends an email reminder using the email address from [ArCustomer](#). If the customer has no email address, skip them and log the omission. Do not send more than one reminder per customer per day.'

This adds the trigger, exact tables, conditions, and boundaries.

Start from Build > Workflows

- Select **New Workflow** in the top-right corner.
- In the **Create New Workflow** dialog, enter a name for the workflow.
- Click **Create Workflow**. The workflow builder will open with a chat panel. Start describing the required process in the chat.



For a complex workflow, turn on **Planning Mode** (the checklist icon in the chat) before your first message so the builder proposes an approach and waits for sign-off.

Run the workflow

- Go to **Build > Workflow** and find the new workflow name.
- Enter run in the chat pane to trigger a manual test run.
- Monitor the execution in **Monitor > Executions**. You can see each step's input, output, and duration.
- If a step fails, the execution detail shows the error.
- Return to the workflow's builder chat panel and describe the fix, or edit the step on the canvas.



Every workflow returns a per step record of inputs and outputs to your Torque cloud region, including workflows with no AI steps.

Attach rules to a workflow or managed agent

Rules can be attached to a **Workflow** or **Managed Agent**.



Rules are attached to workflows or managed agents from the **Rule Catalog** to enforce them at runtime

Attach a rule set to a workflow

- Go to **Build > Workflows** and open the workflow.
- Describe the check in the builder chat panel – for example, "Add a validation step that checks each order against the credit-control rules before posting". The builder adds the validation step and asks which rule set to use if it needs to know.
- Save the workflow. The step runs all active rules in the set against the workflow's data and returns a pass or fail result.

Attach a rule set to a Managed Agent

- Go to **Build > Managed Agents** and open the agent.
- Under **Capability Layers** click **Add Layer** and choose **Rule Set**.
- Select the rule set by name from the drop-down – it shows how many rules each set contains, so you can confirm you have the right one. Complete **When should this managed agent run this rule set?** – for example, "Run after the user pastes an order" – then click **Add Layer**.



You can also add the layer by describing it in the **Managed Agents'** builder chat panel.

- Select **Add Layer**



Rules are grouped into **rule sets**, and you attach the set, not individual rules. Organize related rules into a set before attaching.

A **Rule** flagged for review in the **Rules Catalog** could not be fully verified. Resolve it before you rely on it in a workflow or agent.



Toggle **Active** off to deactivate a rule without removing it from the audit trail. Each rule belongs to one rule set; when the rule is inactive, that set simply stops running it. The rule stays in the catalogue, so you can reactivate it later. Use **Delete** only when you want to remove it permanently.

Rule failure behaviour

A rule that finds a problem in your data records a violation, and by default the workflow carries on so you can review the findings.

A rule that cannot run at all, for example, because its connection or query is broken, is a failure, not a violation.

That rule validated nothing, so the run finishes with the status **Completed with errors** rather than **Succeeded**. Treat the outcome as a configuration problem to fix rather than a data problem.

Test what you have built

TenantAdmins and Editors can test what was built. **Sidekick** is the orchestrator users chat to. It answers their questions directly or delegates to a specialist managed agent and returns the results.



To test your builds, you must have built a **managed agent** and a **workflow**, have some sample records or files to test with. When you need to test against Syspro on-premises, then a **Syspro Torque Executor** must be installed and registered and **connections** must be configured.

- Test a **managed agent** from **Build > Managed Agents > Open Chat**.
- Test a **workflow** from **Build > Workflows > Run**, and inspect each step under **Monitor > Executions**.
 - Where a workflow includes an approval step, confirm it behaves as intended.



In **Sidekick**, an approval required card appears inline for the user to Approve or Deny before anything commits.

- Set a **trigger** under **Connect > Triggers**. You can also add a trigger by asking **Torque-Builder** in plain language. (For example, 'run this every night at 8pm' or 'run this when a file lands in the order folder')
- **Schedules** run on a cron or fixed interval cadence with a timezone.
- **Webhooks** give an inbound URL or send outbound notifications.
- **File polling** watches a folder and runs a workflow when a matching file appears.

-  **Sidekick** has no **Planning Mode**. **Planning Mode** only lives on the builder. **Sidekick** is personal to you and keeps context within a conversation, so you can ask follow-up questions without repeating yourself.

Create Triggers

A trigger is what starts a workflow or a managed agent task automatically, so it runs without someone starting it by hand. For example, instead of opening a workflow and run it, you attach a trigger that fires it when a condition is met.



Use triggers to automate the 'when' of an automation. A workflow defines 'what' happens, and a trigger defines 'when' it happens.

Syspro Torque has four trigger types, and any workflow can also be run manually or started from an API call:.

- • **Schedule** – runs a workflow or Managed Agent on a timer.
- • **Webhook** – an inbound URL an external system calls to start a workflow, or an outbound call Torque makes when something happens, such as a workflow completing or failing.
- • **File polling** – watches a folder on your network and runs a workflow when a matching file appears.
- • **FTP/SFTP contract** – polls a remote FTP, SFTP, FTPS or SCP location, runs a workflow when a matching file arrives, and can deliver files back.



Add **FTP contracts** wherever the **Connect** area is enumerated.



Triggers that must reach your on-premise Syspro or SQL environment need an online **Syspro Torque Executor**.

Create a schedule

- Go to **Connect > Triggers > Schedules**
- Select **New Schedule** or **Create Your First Schedule**.



The **Schedules** page lists your existing schedules. If you have none, it reads 'No schedules configured yet.'

- Under **Basic Information**, enter a name and description.
- Select a **Target** (i.e. workflow or managed agent). This is what will run when the schedule start.

-  For a **workflow** target, also pick an environment. This sets which connections and secrets the run uses. **Managed agent** targets does not have environments to select)
-  Target types (i.e. workflow or managed agent) and targets cannot be changed after the schedule is created. To select different types or targets a new schedule must be created.
- Select a schedule type. Two options exist:
 - Cron Expression

This is the best option for calendar-based timing (for example, a specific time of day, day of week, or day of month)

 - Select a quick preset button.
 - Under **Cron Expression** *Syspro Torque* will validate the expression and display a plain-language description, including the next run time.
 - Fixed Interval

This is the best option for every N minute cadence.

 - Set the interval (minutes)
- Set the correct **Timezone** so cron times fire in the correct timezone. (For example, South Africa (SAST)).
- Optionally, add input and output options.
- Select **Save**.
-  If the *Syspro Torque Executor* is offline, scheduled runs are recorded as **Deferred**.

Create a webhook

- Go to **Connect > Triggers > Webhooks**
- Select **New Webhook** or **Create Your First Webhook**.
-  The **Webhooks** page lists your existing webhooks. If you have none, it reads 'No webhooks configured yet.'
- Under **Basic Information**, enter a name, direction (Inbound (receive) or Outbound (send)) and description.
- Configure direction depending on direction selected.
- Under **Inbound Configuration** select a **Target** (i.e. workflow or managed agent).

-  For a **workflow** target, also pick an environment. This sets which connections and secrets the run uses. **Managed agent** targets does not have environments to select)
-  For a **managed agent** target, optionally add a payload template to turn incoming payload fields into the prompt sent to the agent.
- Under **Outbound Configuration** add a destination URL (this is where *Syspro Torque* sends the notification), and an even type.
-  You can also set the retry behaviour.
- Under **Authentication**, choose an Authentication type. The following three authentication types exist:
 - API Key - callers include a shared key.
 - HMAC Signature - callers sign the request body with a shared secret and *Syspro Torque* verifies the signature.
 - API Key + HMAC - both are used.
- Select **Save**.

Create a file polling

- Go to **Connect > Triggers > File Polling**.
-  This page is titled **Polling Contracts**.
- Select **New Contract** or **Create Your First Contract**.
- Under **Basic Information**, enter a name and description.
-  Ensure it's enabled to start polling as soon as it's saved.
- Define the file paths as seen by the *Syspro Torque Executor* environment. The following paths can be created:
 - Source path - this refers to the directory to be monitored for new files.
 - File pattern - this refers to the file type of the files to be processed (For example, .xml or .csv)
 - History Path - this is optional. All processed files will be moved here.
 - Failed Path - this is optional. All files that failed processing will be moved here.
- Under the **File Content Processing** content mode drop-down select how file contents are passed to the workflow, and select the **max file size** that is allowed to be passed on.

- Next, file polling must point to a specific workflow and environment. This is the workflow that will execute when a matching file is found. Switch on sweep interval, which will indicate to the *Syspro Torque Executor* how often to check the folder for new files.
- Select **Create Contract**.



File polling limits: maximum file size 1 - 100 Mb (oversized files pass metadata only), and sweep interval from 5 seconds to 24 hours.



If the *Syspro Torque Executor* is offline, polling contracts wait at **Executor Offline**.

Start using Syspro Torque (Sidekick)

Sidekick is the primary AI you interact with for day-to-day questions and tasks. You use *Sidekick* to ask questions, kicking of workflows, reviewing data, and getting things done.

Things you can do in *Sidekick* :

- Answer questions about your Syspro data.
- Run workflows on your behalf.
- Create and review documents.
- Delegate complex tasks to specialist Managed Agents and report back.
- Keep track of tasks running in the background.



To get answers about your data or to run workflows, an *Syspro Torque Executor* must be installed and be registered, and the underlying connections, workflows, or managed agents must already exist and be shared with you. *Sidekick* can only act with what you are allowed to access.

Use cases

Sales and order management

Processing sales orders from a PDF

Automates the full order capture and posting process, from document receipt to confirmed sales order in Syspro.

You: Either upload the purchase order PDF using *Sidekick*, or place it in a monitored folder configured to trigger the workflow.

Syspro Torque: Reads the PDF, extracts order lines, checks stock availability for each line, and presents any shortage for resolution before posting the confirmed sales order to Syspro.

Managed agent + Workflow

Multi-step

Handling stock shortages on an order

Structures the shortage resolution decision as a governed, auditable step within the order processing workflow.

You: Review the options presented when a shortage is detected, and select whether to substitute with an alternative item or place the line on back order.

Syspro Torque: Identifies lines that cannot be fulfilled from available stock, presents configured substitutes where available, and pauses at a human intervention point. Once a decision is confirmed, *Syspro Torque* applies it and continues processing the order.

Managed agent

Rules required

Validating pricing against market data

Adds an automated market intelligence check to the order processing workflow before an order is confirmed.

You: No additional input is required. The check runs automatically as part of order processing.

Syspro Torque: Queries current market pricing data for the items on the order, compares them against the prices being applied, and flags any lines that fall outside the configured acceptable range.

Managed agent

Rules required

Procurement and inventory

Raising a purchase requisition automatically

Automates replenishment calculation and requisition creation, ensuring purchasing decisions are based on accurate, current data.

You: Trigger the workflow for a stock code or range of stock codes, or configure it to run on a schedule.

Syspro Torque: Calculates the required replenishment quantity using average daily demand, safety stock levels, economic batch quantity, due date, and unit cost, then raises a purchase requisition in Syspro with the calculated values populated.

Workflow

Multi-step

Approving multiple requisitions at once

Provides a consolidated approval interface for requisitions, replacing Syspro's standard one-at-a-time approval process.

You: Open the requisition approval agent, review the batch of pending requisitions, and approve or reject items before confirming.

Syspro Torque : Retrieves all requisitions pending your approval, presents them in a consolidated view, and posts the approved and rejected decisions back to Syspro on confirmation.

Managed agent

Configuration only

Finance and compliance

Processing bank statements as cash book deposits

Automates bank statement ingestion and review, with a mandatory human approval step before any posting occurs in Syspro.

You: Place PDF bank statements in the monitored folder, then review and confirm the transactions **Syspro Torque** presents before posting proceeds.

Syspro Torque : Detects new PDF files in the configured folder, extracts transaction data, checks for duplicates against existing cash book entries, and presents the transactions for review. On confirmation, posts the approved transactions as cash book deposits in Syspro.

Managed agent + Workflow

Multi-step

Running a SOX compliance check

Makes compliance checks available on demand, combining your Syspro data with codified compliance knowledge to produce a structured findings report.

You: Initiate the compliance check through **Sidekick** and specify the scope, i.e. period, entities, or accounts to include.

Syspro Torque : Queries the relevant Syspro data, applies segregation-of-duty rules and aged balance thresholds, identifies control weaknesses, and produces a structured report with findings and a remediation plan, citing the specific rule breached for each item.

Managed agent

Rules required

Drilling down into financial statements

Enables conversational querying of financial statement data, with the ability to drill into the detail behind any figure without running additional reports.

You: Ask **Sidekick** or the configured financial agent a question about a specific line, period, or variance in your income statement, in plain English.

Syspro Torque : Queries the connected Syspro and SQL data, resolves the question against GL dimensions and transaction detail, and returns a structured answer with the supporting figures.

Managed agent

Configuration only

Reporting and dashboards

Building an operational dashboard

Produces a live operational dashboard from a plain-language description, without any development effort.

You: Describe the metrics you want to track. Optionally, provide a screenshot or sketch of the layout you have in mind.

Syspro Torque : Builds a live dashboard card connected to your Syspro and SQL data, presenting the specified metrics and refreshing them in real time.

Managed agent

Configuration only

Scheduling automated reports

Automates the execution and delivery of recurring reports, ensuring they run reliably on a defined schedule without manual initiation.

You: Define the report content, intended recipients, and delivery schedule when configuring the workflow.

Syspro Torque : Runs the workflow at the configured interval, queries the relevant data, formats the report, and delivers it to the specified recipients.

Workflow

Multi-step

System and data management

Detecting business object schema changes

Automates the comparison of documents against current Syspro business object schemas, surfacing discrepancies before they cause downstream issues.



Syspro Torque includes the Syspro 8 business object schemas out of the box. If you need schemas for another Syspro version, Syspro can load them on request.

You: Place the documents to be checked in the monitored folder, or trigger the workflow manually for a specific set of files.

Syspro Torque : Reads the documents, compares their content against the current Syspro business object schemas in the knowledge base, identifies fields or descriptions that no longer match, and produces a prioritized report of discrepancies.

Workflow

Multi-step

Querying your database in plain language

Enables authorized users to ask data questions in plain English and receive accurate answers, without needing to know the schema or run a query manually.

You: Ask **Sidekick** or a configured Managed Agent a question about your data in plain English.

Syspro Torque : Translates the question into a structured query, executes it against the connected Syspro or SQL database within the agent's configured access permissions, and returns the result in a readable format.

Sidekick / Managed agent**Configuration only**

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