

ActionPlane Product Guide

April 13, 2026

Table of Contents

ActionPlane Product Guide

What ActionPlane does

How it works

Supported systems

CRM

ITSM and support

ERP and finance

Expansion categories

Getting started

Step 1: Sign up for Free Developer

Step 2: Connect one system

Step 3: Run in simulation mode

Step 4: Move to production

Step 5: Upgrade when ready

Operator app reference

Overview (Dashboard)

Launch request

Approvals

Console

Evidence

Audit trail

Rollbacks

Review threads

Reliability Lab

Connectors

Setting up a connector

Connector health

Governance policies

What policies control

Editing policies

Pricing

How to buy

Key terms

Support

Further reading

ActionPlane Product Guide

What ActionPlane does

ActionPlane is a governed execution layer for AI agents writing to enterprise systems of record. When an AI agent wants to update a Salesforce opportunity, close a ServiceNow incident, approve a NetSuite vendor bill, or modify a Workday employee record, ActionPlane sits between the agent and the live system. It turns a proposed write into a governed run with preview, policy, approval, execution control, recovery posture, and audit evidence.

The product does not replace the AI agent or the business system. It governs the write path between them.

How it works

Every governed action follows a six-stage workflow:

1. **Preview** — see the exact field-level change, impact summary, and execution posture before anything reaches the system.
2. **Decide** — evaluate connector-aware policy, readiness indicators, and evidence requirements automatically.
3. **Approve** — route only the risky changes to a human. Low-risk writes can auto-run under policy.
4. **Execute** — run through managed integrations with pre-image and post-image capture.
5. **Recover** — keep rollback and compensation plans available on the same run.
6. **Prove** — attach evidence, audit events, Console traces, and replay history to the execution record.

All six stages stay on the same governed run. There is no need to piece together information from separate tools or log systems.

Supported systems

CRM

SYSTEM	CONNECTOR KEY	GOVERNED WORKFLOWS
Salesforce Sales Cloud	<code>salesforce-crm</code>	Opportunity, account, and contact updates
Salesforce Service Cloud	<code>salesforce-servicecloud</code>	Case management and service console writes
Dynamics 365 Sales	<code>dynamics365-sales</code>	Opportunity, account, and contact updates
HubSpot CRM	<code>hubspot-crm</code>	Deal, company, and contact updates
Zoho CRM	<code>zoho-crm</code>	Deal, account, and contact updates
Oracle Fusion Sales	<code>oracle-sales</code>	Opportunity, account, and contact updates
SAP Sales Cloud	<code>sap-sales-cloud</code>	Opportunity, account, and contact updates

ITSM AND SUPPORT

SYSTEM	CONNECTOR KEY	GOVERNED WORKFLOWS
ServiceNow	<code>servicenow-ticketing</code>	Incident closure, resolution notes, state changes
Zendesk	<code>zendesk-ticketing</code>	Ticket resolution, reply posture, status updates
Freshdesk	<code>freshdesk-ticketing</code>	Ticket resolution and status updates
Intercom	<code>intercom-messaging</code>	Conversation resolution and customer messaging
Jira Service Management	<code>jira-sm</code>	Request resolution and ITSM state changes

ERP AND FINANCE

SYSTEM	CONNECTOR KEY	GOVERNED WORKFLOWS
NetSuite ERP	<code>netsuite-erp</code>	AP vendor bill approval, supplier payment review
Dynamics 365 Finance	<code>dynamicsfinance</code>	AP vendor invoice approval
Workday Financials	<code>workdayfinancials</code>	Supplier invoice approval
SAP S/4HANA Cloud	<code>saps4hana</code>	Supplier invoice approval
Oracle Fusion Cloud ERP	<code>oraclefinancials</code>	Supplier invoice approval

EXPANSION CATEGORIES

HR, procurement, marketing, identity, and billing connectors are available through the expansion framework with setup pages in the operator app.

Getting started

STEP 1: SIGN UP FOR FREE DEVELOPER

Go to actionplane.ai and click **Start free developer**. Free Developer includes:

- ▶ 500 governed runs per month
- ▶ Up to 2 connectors
- ▶ 1 operator seat
- ▶ Full governance loop (preview, policy, approval, execution, audit, rollback, Reliability Lab)
- ▶ No credit card required

STEP 2: CONNECT ONE SYSTEM

Open the operator app and navigate to **Connectors**. Choose one system to connect first. Salesforce sandbox, ServiceNow dev instance, or NetSuite test account are all good starting points.

For each connector you need:

- ▶ A sandbox or test environment URL
- ▶ Dedicated integration credentials with least-privilege permissions
- ▶ API version (where applicable)

The connector setup page walks through each field. Click **Validate auth** to confirm the connection works, then **Sync metadata** to pull in object and field definitions.

STEP 3: RUN IN SIMULATION MODE

Navigate to **Launch request** and pick a starter workflow. Keep the **Simulate first** toggle on. This runs the full governance loop — preview, policy, approval — without making a live write to the system.

Verify that:

- ▶ The preview shows the exact fields, values, and state changes you expect
- ▶ Policy routes risky changes for approval and allows low-risk changes to auto-run
- ▶ Evidence, audit, and rollback posture stay attached to the run

STEP 4: MOVE TO PRODUCTION

Once simulation results look correct:

1. Turn off the simulation toggle on the workflow
2. Submit a governed action against a real record in a sandbox or low-risk environment
3. Verify the live write succeeded and the post-image matches expectations
4. Check that rollback posture is available on the completed run

STEP 5: UPGRADE WHEN READY

When your team needs more governed runs, connectors, or team members, purchase a paid plan through Azure Marketplace or AWS Marketplace. The upgrade happens through marketplace procurement — no sales conversation required.

Operator app reference

OVERVIEW (DASHBOARD)

The dashboard shows the current state of your governance operations:

- ▶ **Pending approvals** — runs blocked behind human review
- ▶ **Needs attention** — approvals, failures, and rejections requiring action
- ▶ **In flight** — queued and currently running actions
- ▶ **Available workflows** — connector-aware write paths you can launch

Quick actions: **Launch request**, **Open approvals**, **Connectors overview**.

LAUNCH REQUEST

Start a governed action from a preset or custom payload.

1. **Pick the workflow** — choose a connector-specific action (e.g., Salesforce opportunity update, NetSuite vendor bill approval)
2. **Load the preset** — start from a suggested payload instead of writing raw JSON
3. **Keep simulation on** — validate preview and policy before allowing a production write

Each workflow shows its risk level, approval path, and simulation support.

APPROVALS

Review runs that governance policy has flagged for human decision.

For each pending approval you can see:

- ▶ The exact field-level changes the action will make
- ▶ The policy reason it was routed for approval
- ▶ Evidence attached to the run
- ▶ Rollback support level

Actions: **Approve**, **Reject**, or **Send back for revision**.

CONSOLE

Inspect live and completed runs without dropping into disconnected logs.

The Console provides:

- ▶ **Progress trees** — visual execution path from submission to completion
- ▶ **Traces** — detailed step-by-step execution log
- ▶ **Branch and retry** — create an alternate execution path from any checkpoint
- ▶ **Manual intervention** — take over a run when the automated path is wrong or incomplete

EVIDENCE

Review the evidence trail attached to each governed run.

Evidence includes:

- ▶ **Request evidence** — the original proposed change with field-level detail
- ▶ **Output evidence** — execution results including pre-image and post-image snapshots
- ▶ **Action history** — ordered events across the evidence chain

Every piece of evidence stays attached to the run it belongs to.

AUDIT TRAIL

Inspect the immutable audit record of every governed action.

The audit trail shows:

- ▶ **Audit service status** — whether the audit logger is active, paused, or lagging
- ▶ **Run events** — immutable audit facts for any selected run
- ▶ **Processing controls** — pause and resume event processing

Audit events cannot be modified or deleted after creation.

ROLLBACKS

Request simulated or production rollback workflows for completed runs.

To initiate a rollback:

1. Select a completed run that has rollback support
2. Choose **Simulate only** (to preview the reversal) or **Production rollback** (to execute it)
3. Provide a reason for the rollback
4. Track the rollback execution state

Rollbacks use the pre-image captured during the original execution to build a compensating write. If the pre-image is unavailable or the reversal cannot be automated, the run escalates to manual follow-up.

REVIEW THREADS

Add team notes and annotations to any governed run. Notes stay attached to the run and are visible to all team members with access.

RELIABILITY LAB

Replay governed actions against failure and drift scenarios before they happen in production.

The lab runs actions in simulated execution mode and tests against:

- ▶ Schema drift (field or object changes in the target system)
- ▶ Permission failures (credential or access changes)
- ▶ Unsafe routing (policy misconfigurations)
- ▶ Cloud mismatch (infrastructure differences between environments)

Use the Reliability Lab to validate policy changes against historical runs before applying them.

Connectors

SETTING UP A CONNECTOR

Each connector follows the same pattern:

1. **Navigate to the connector page** in the operator app under **Connectors**
2. **Enter connection details** — instance URL, client ID, client secret, API version
3. **Toggle sandbox mode** if connecting to a test environment
4. **Activate the connector** to make it available for governed workflows
5. **Validate auth** to confirm credentials work
6. **Sync metadata** to pull in object and field definitions from the target system

CONNECTOR HEALTH

The **Connectors** overview page shows:

- ▶ **Health status** — whether each connector is validated and operational
- ▶ **Data freshness** — how recently metadata was synced
- ▶ **Failure rate** — rolling error rate for recent executions
- ▶ **Safety stops** — any active blocks preventing execution through this connector

If a connector's failure rate crosses the configured threshold, a safety stop activates automatically. Acknowledge the safety stop and investigate before resuming.

Governance policies

Governance policies define the rules that control what happens to each governed action.

WHAT POLICIES CONTROL

- ▶ **Approval routing** — which actions require human approval and which can auto-run
- ▶ **Readiness thresholds** — minimum readiness level required for execution
- ▶ **Evidence requirements** — what evidence must be attached before an action can proceed
- ▶ **Safety stops** — manual or automatic blocks on specific action types
- ▶ **Auto-execution readiness** — the minimum readiness level at which actions can run without approval

EDITING POLICIES

Navigate to **Governance** in the operator app. Policies are attached to specific actions and connectors. Edit a policy to change:

- ▶ The minimum readiness level for auto-execution
- ▶ Whether human approval is always required
- ▶ Which evidence fields are mandatory
- ▶ The rollback support level expected

Policy changes take effect immediately for new submissions. Existing in-flight runs are not retroactively affected.

Pricing

TIER	PRICE	GOVERNED RUNS	CONNECTORS	TEAM MEMBERS	OVERAGE	CHANNEL
Free Developer	\$0/mo	500/mo	2	1	—	Direct signup
Starter	\$99/mo	5,000/mo	3	3	\$0.02/run	Marketplace
Team	\$499/mo	25,000/mo	5	10	\$0.015/run	Marketplace
Business	\$1,999/mo	150,000/mo	All	25	\$0.01/run	Marketplace
Scale	\$4,999/mo	500,000/mo	All	100	\$0.01/run	Marketplace

Annual pricing is available at 15% discount from monthly rates.

Overage above each tier's included runs is billed at the published per-run rate through the marketplace metered dimension.

No contact-sales tier. No private pricing path. No negotiated discounts. Scale is the published top tier — usage above 500,000 runs per month continues at \$0.01 per run with no additional tier or negotiation.

HOW TO BUY

- 1. Start free** — sign up at actionplane.ai with email only. No credit card.
- 2. Move to marketplace** — when ready for production, purchase Starter, Team, Business, or Scale through Azure Marketplace or AWS Marketplace.
- 3. Pay published overage** — usage above the included allowance is billed at the published per-run rate.

Key terms

TERM	DEFINITION
Governed run	A durable record of an action with preview, policy, approval state, execution state, and evidence attached
Connector	An integration with a business system (Salesforce, ServiceNow, NetSuite, etc.)
Preview	Field-level diffs showing exactly what will change before execution
Policy	Rules that determine approval routing based on risk, evidence, and readiness
Safety stop	A block preventing execution through a connector, triggered manually or by failure rate
Rollback	A recovery action that reverses a completed write using captured pre-image data
Simulation	Running a governed workflow without making a live write, for testing and validation
Replay	Re-executing a workflow against failure or drift scenarios in the Reliability Lab
Evidence	Request evidence, output evidence, and event history attached to a governed run
Readiness level	Health and validation status of a connector or action, used for policy decisions
Overage	Governed runs above the tier's included allowance, billed at published per-run rates
Workspace	Your organization's ActionPlane environment with team members, connectors, and policies

Support

- ▶ Email: support@actionplane.ai
- ▶ Security and data handling: actionplane.ai/security
- ▶ Privacy policy: actionplane.ai/privacy
- ▶ Terms of use: actionplane.ai/terms

Further reading

- ▶ [Product overview](#) — how the governance workflow operates
- ▶ [Pricing and plans](#) — published tier details
- ▶ [Marketplace procurement](#) — how to buy through Azure or AWS
- ▶ [Salesforce workflow](#) — CRM-specific governance guide
- ▶ [ServiceNow workflow](#) — ITSM-specific governance guide
- ▶ [Technical guides](#) — buyer guides for governance, approvals, audit, and human-in-the-loop