



Mission Control: Attachments

Megan De Freitas - 2024-11-22 - Legacy Feature Documentation

Attachments enable users to add supporting documentation to any customer, product or document to ensure that relevant information is always included in the order to cash cycle.

In this documentation, we'll explore where and how users can take advantage of attachments within Cavallo.

Note: Cavallo attachments read and write with Business Central meaning users can access the same attachments in either system to ensure there isn't a data silo. This documentation focuses on the attachments functionality within Cavallo.

Attachments

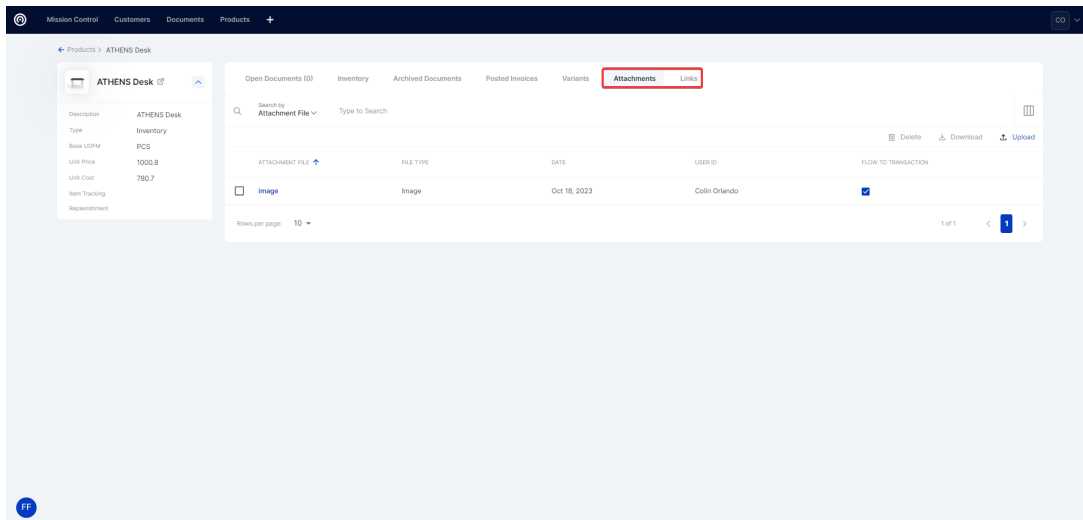
Users can access attachments in the following areas of the application:

Customer Card

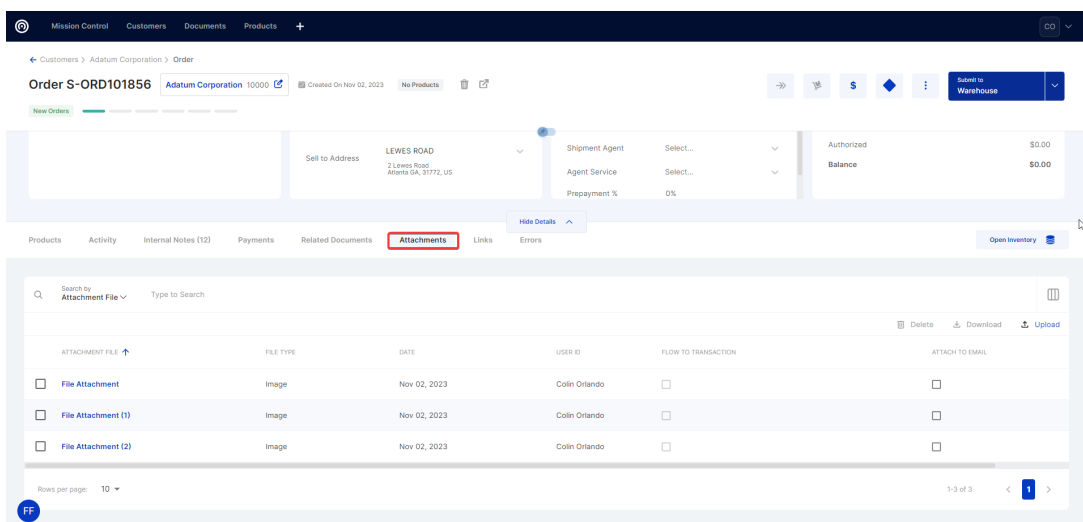
The screenshot displays the Cavallo Mission Control interface. The top navigation bar includes 'Mission Control', 'Customers', 'Documents', and 'Products'. The left sidebar shows the 'Customers' section with 'Adatum Corporation' selected. The main content area is titled 'Attachments' and shows a list of attachments for the selected customer. The list has columns for 'ATTACHMENT FILE', 'FILE TYPE', 'DATE', 'USER ID', and 'FLOW TO TRANSACTION'. Three attachments are listed: 'borpa-spin-borpa' (Image, Jun 06, 2023), 'chrome_85N6WYCg2D' (Other, Sep 29, 2023), and 'chrome_dp04tg5rzu' (Other, Sep 07, 2023). All are associated with 'COLIN ORLANDO' and have a 'Flow to Transaction' checkbox checked. The interface also includes a search bar, a 'New Document' button, and a 'Rows per page' dropdown set to 10.

| ATTACHMENT FILE | FILE TYPE | DATE | USER ID | FLOW TO TRANSACTION |
|--|-----------|--------------|---------------|-------------------------------------|
| <input type="checkbox"/> borpa-spin-borpa | Image | Jun 06, 2023 | COLIN ORLANDO | <input checked="" type="checkbox"/> |
| <input type="checkbox"/> chrome_85N6WYCg2D | Other | Sep 29, 2023 | COLIN ORLANDO | <input checked="" type="checkbox"/> |
| <input type="checkbox"/> chrome_dp04tg5rzu | Other | Sep 07, 2023 | COLIN ORLANDO | <input checked="" type="checkbox"/> |

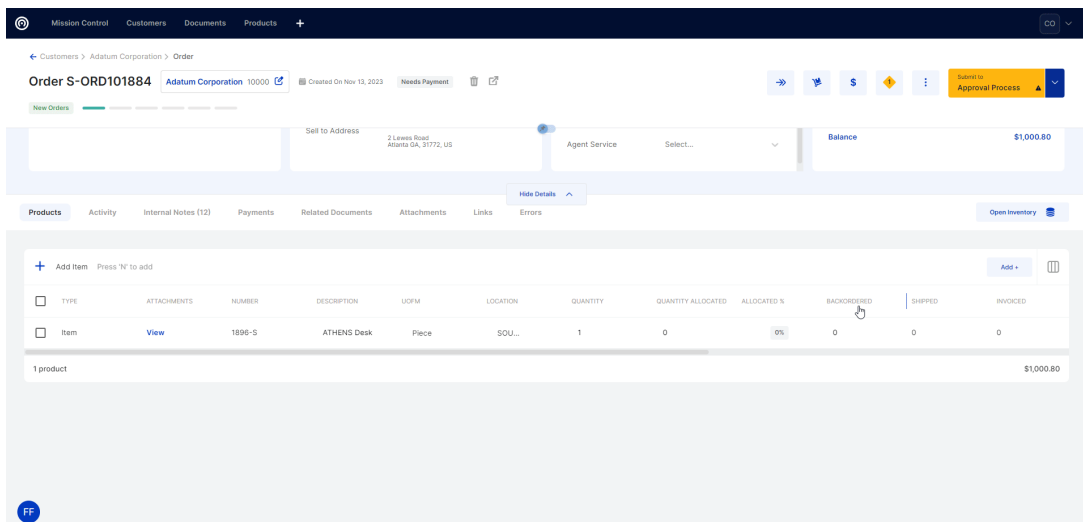
Product Card



Sales Document



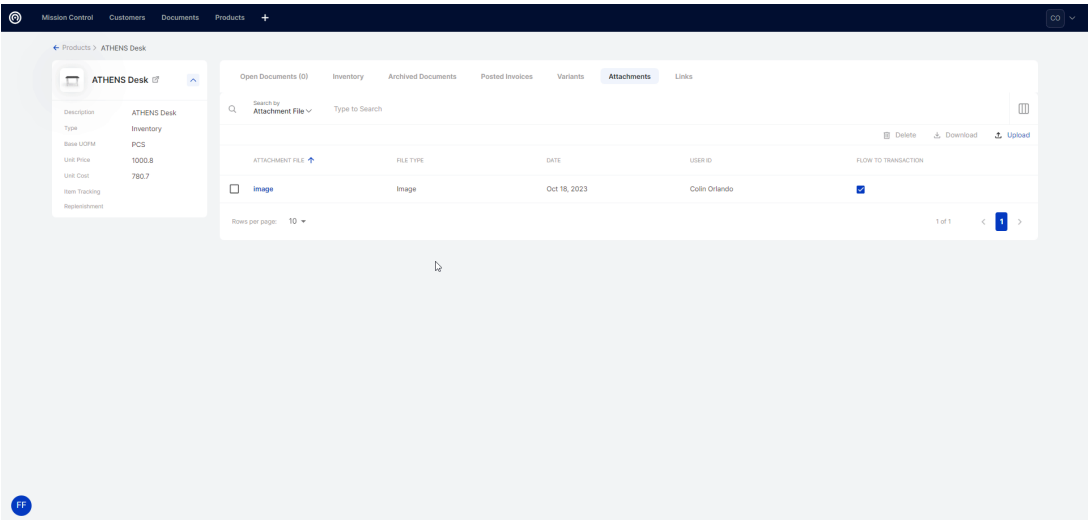
Sales Line



Uploading Attachments

Users can upload attachments in all of the areas that attachments exist within Cavallo.

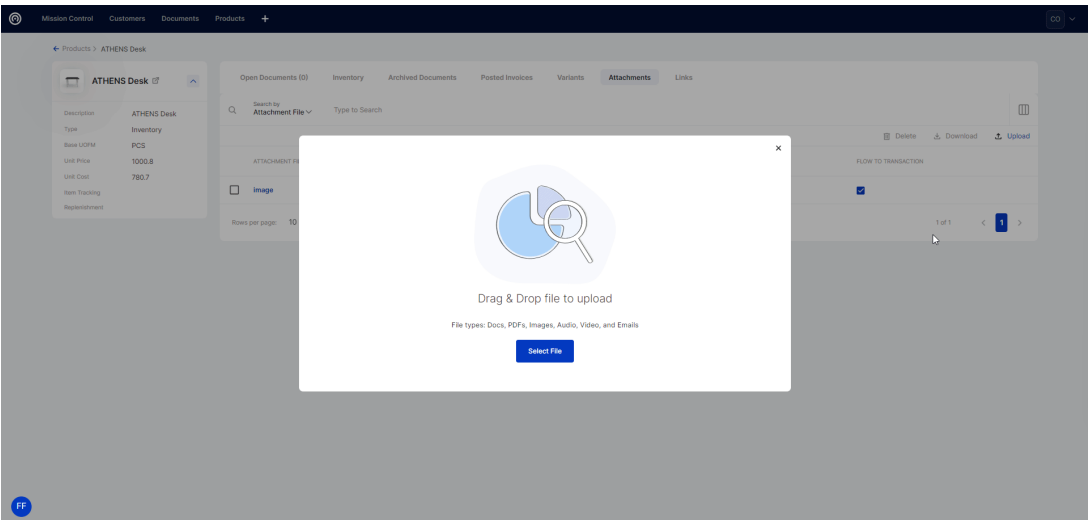
Simply navigate to the area where the file will be uploaded, and click the upload button located on the task bar:



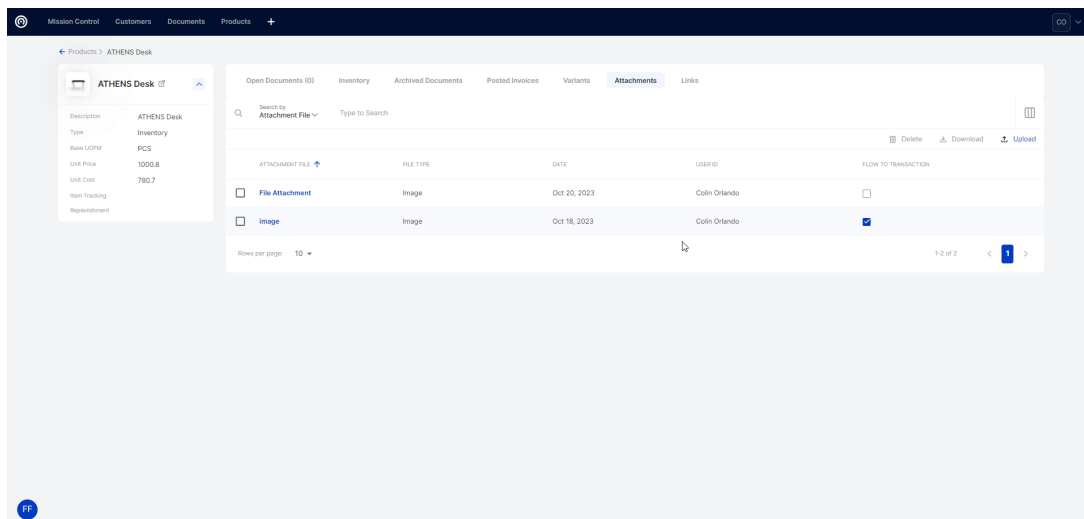
Note: The file size is limited to 75 mb

Users have the option to upload a file through one of two methods: either via the drag-and-drop functionality or by navigating through their local file explorer. It is important to highlight that attachments within Cavallo exhibit seamless compatibility with Business Central, enabling content uploaded in Cavallo to be readily accessible within the Business Central attachments grids.

Drag and Drop:



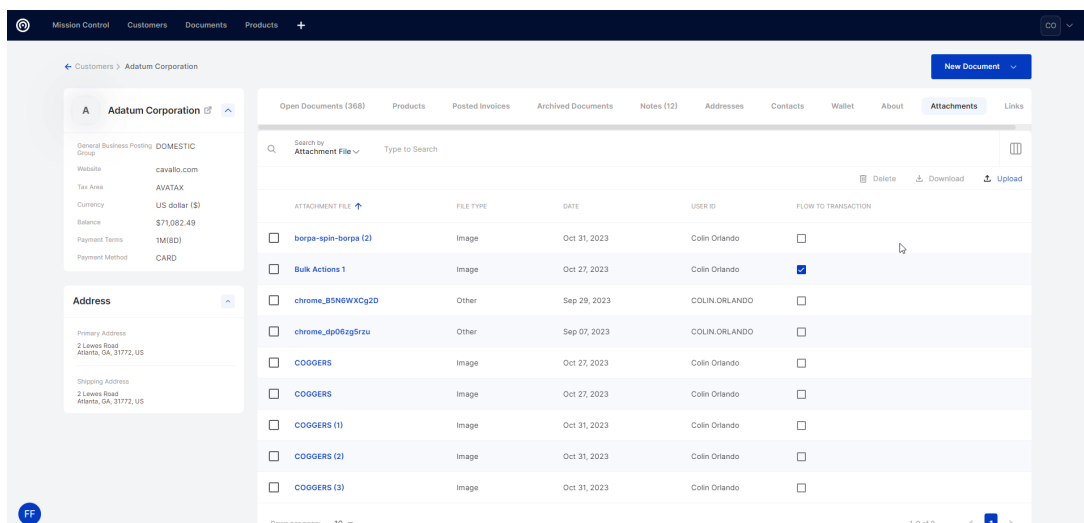
File Explorer:



Upon successful file upload by the user, the file will be displayed in the grid, making it accessible for download. Additionally, users will have the option to mark the "Flow to Transaction" checkbox that when true, allows attachments from the customer card and product cards to be automatically added to any new sales document.

Downloading Attachments

Users can download attachments in all of the areas that attachments exist within Cavallo. Simply navigate to the attachments tab where the file is located, select the file with the checkbox and click download. Only one file can be downloaded at a time and the file will be downloaded to the users device:



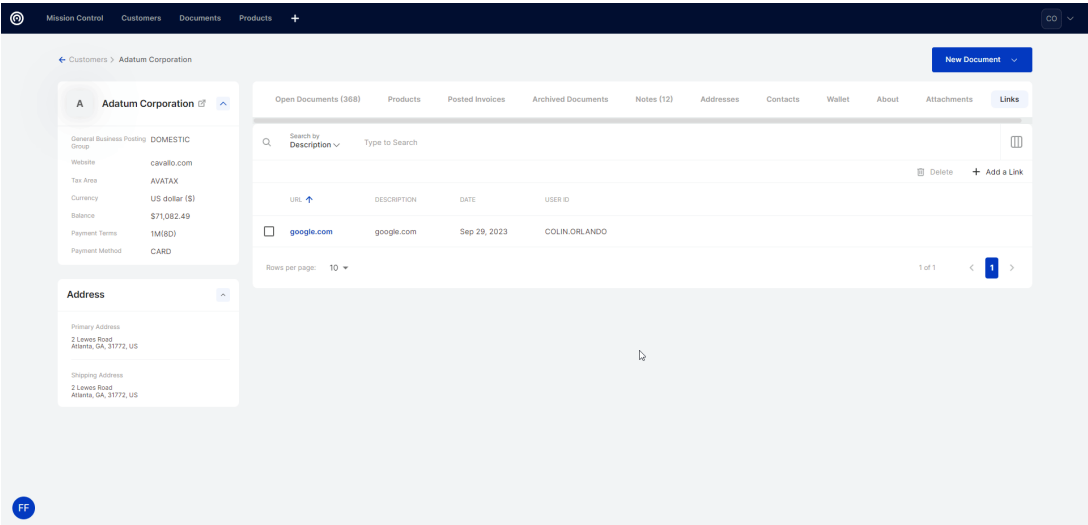
Note: The file size is limited to 75 mb

Adding Links

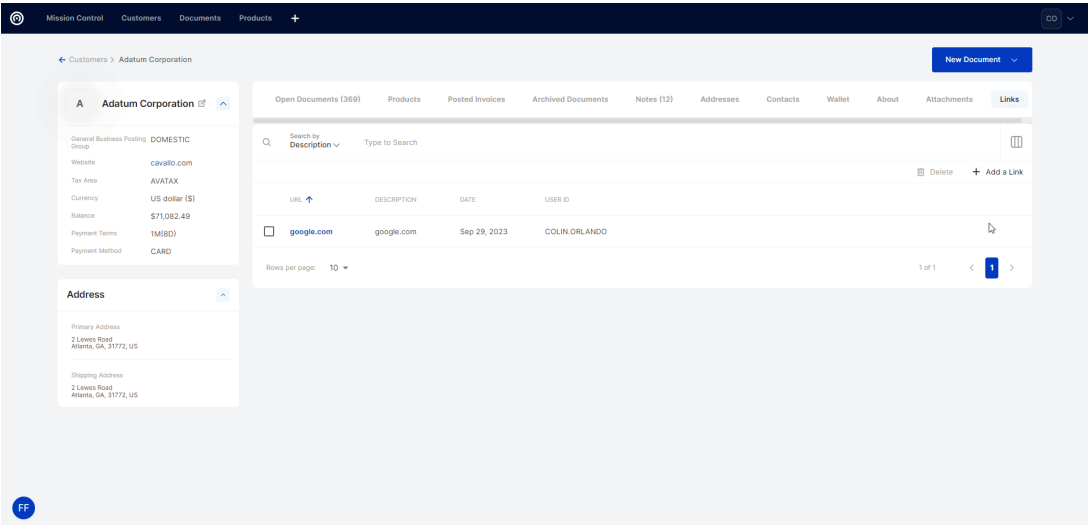
In addition to attachments, users can also add links to the customer, product or document level to provide more information into that specific business object. Unlike attachments,

links do not flow from the customer or product level to sales documents and must be added specifically in the area the user needs to access it in.

Adding & Deleting Links



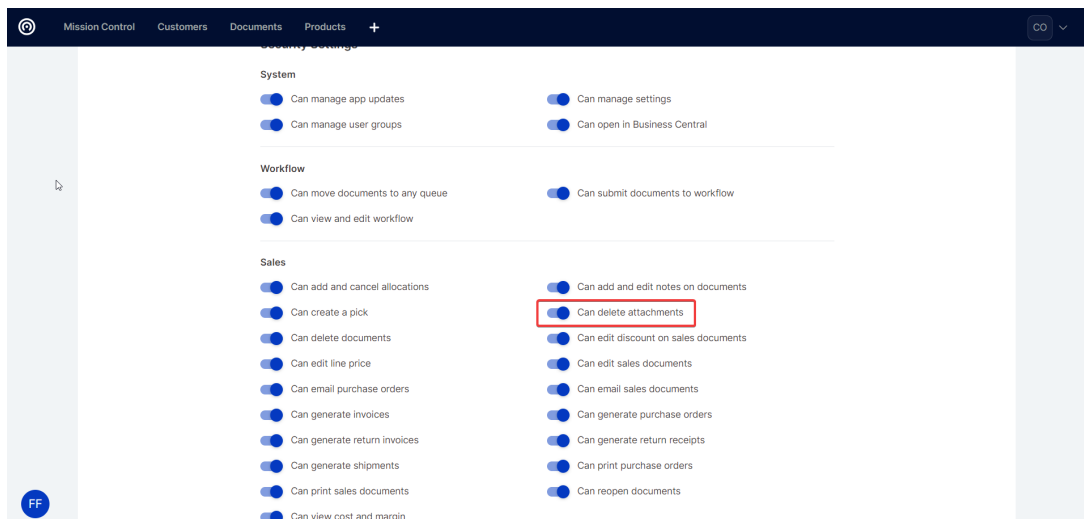
When users click the link in the URL column, Cavallo will attempt to open the link in the users current web browser. Additionally, any links added in Cavallo will sync with the Business Central links panel, and vice versa if links are added within Business Central.



Deleting Attachments

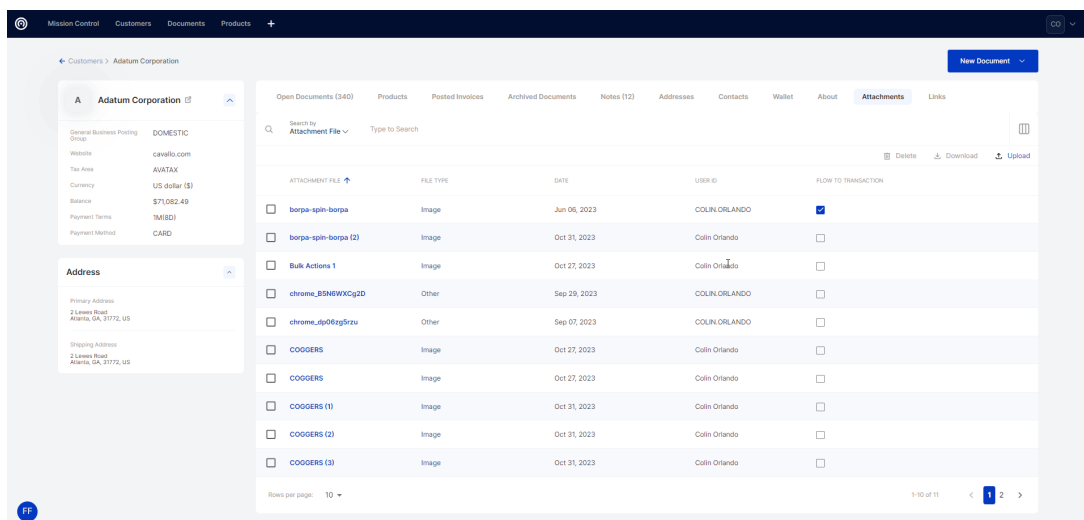
Should a user wish to remove an existing attachment, this action can be executed from any location within the application where attachments are accessible. It is important to note that the capability to delete attachments is subject to a security setting, necessitating administrators to assign this permission to users who require the ability to delete attachments.

Security Setting:

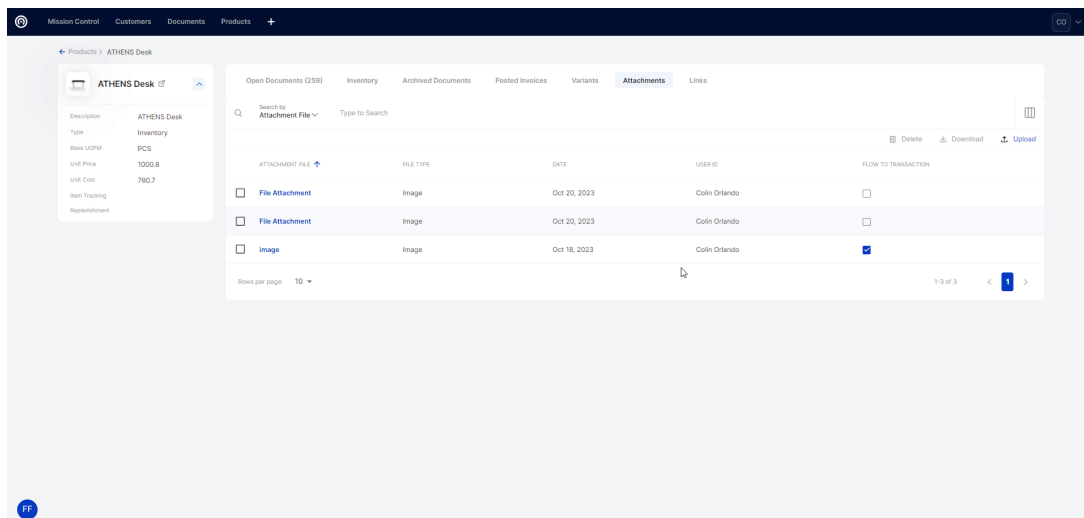


When the above security setting is enabled, users will see the delete action in the following areas of the application:

Customer Card:



Product Card:



Sales Document:

Mission Control
Customers
Documents
Products
+

Customers > Adatum Corporation > Order

Order S-ORD101856
Adatum Corporation 10000
Created On Nov 02, 2023
No Products

New Orders

Document Details
Customer PO #
Document Date Today 11/02/2023
Location SOUTH
Sales Representative JO

Billing
Billing Address LEWES ROAD
2 Lewes Road
Atlanta, GA, 30372, US
Contact Name
Payment Method CARD
Payment Terms 1MISD
Sell to Address LEWES ROAD
2 Lewes Road
Atlanta, GA, 30372, US

Shipping
Shipping Address LEWES ROAD
2 Lewes Road
Atlanta, GA, 30372, US
Shipping Contact Name
Requested Delivery Date Choose a Date
Shipping Method CFR
Shipment Agent
Agent Service
Prepayment % 0%

Summary
Subtotal \$0.00
Discount % 0.00%
Tax \$0.00
Total \$0.00
Paid \$0.00
Authorized \$0.00
Balance \$0.00

Products
Activity
Internal Notes (12)
Payments
Related Documents
Attachments
Links
Errors

Search by Attachment File
Type to Search

ATTACHMENT FILE
FILE TYPE
DATE
USER ID
FLOW TO TRANSACTION
ATTACH TO EMAIL

File Attachment
Image
Nov 02, 2023
Colin Orlando

Rows per page: 10
1 of 1

Flow to Transaction

Once an attachment is uploaded, users have the option to allow the attachment to "Flow to Transaction". When checked, this action will bring all customer attachments into a new sales document by default and and if any product level attachments exist, they will be brought into the document as the product is added to the sales line grid.

Customer Attachment:

Mission Control
Customers
Documents
Products
+

Customers > Adatum Corporation

New Document

Open Documents (339)
Products
Posted Invoices
Archived Documents
Notes (12)
Addresses
Contacts
Wallet
About
Attachments
Links

Search by Attachment File
Type to Search

ATTACHMENT FILE
FILE TYPE
DATE
USER ID
FLOW TO TRANSACTION

borpa-spin-borpa
Image
Jun 06, 2023
COLIN ORLANDO

borpa-spin-borpa (2)
Image
Oct 31, 2023
Colin Orlando

Bulk Actions 1
Image
Oct 27, 2023
Colin Orlando

chrome_BSNEWXCg2D
Other
Sep 29, 2023
COLIN ORLANDO

chrome_dp06zg5rzu
Other
Sep 07, 2023
COLIN ORLANDO

COOGERS
Image
Oct 27, 2023
Colin Orlando

COOGERS
Image
Oct 27, 2023
Colin Orlando

COOGERS (1)
Image
Oct 31, 2023
Colin Orlando

COOGERS (2)
Image
Oct 31, 2023
Colin Orlando

COOGERS (3)
Image
Oct 31, 2023
Colin Orlando

Rows per page: 10
1 of 11

General Business Posting Group DOMESTIC
Website cavallo.com
Tax Area AVATAX
Currency US dollar (\$)
Balance \$71,082.49
Payment Terms 1MISD
Payment Method CARD

Address
Primary Address
2 Lewes Road
Atlanta, GA, 30372, US
Shipping Address
2 Lewes Road
Atlanta, GA, 30372, US

Product Attachment:

Waiting on sales line attachments

Emailing Attachments

If a user wants to add sales document attachments to an email, they can use the "Attach To Email" column under the attachments tab. When selected, the chosen attachment will be included in an email, whether it's generated manually or through a workflow. Users can select up to 10 attachments total between line level attachments and document level attachments.

Attach To Email:

The screenshot shows the 'Attachments' tab for Order S-ORD101856. The top section displays order details: Order S-ORD101856, Adatum Corporation, 10000, Created On Nov 02, 2023, No Products. Below this, there are fields for 'Sell to Address' (LEWES ROAD, 2 Lewes Road, Atlanta GA, 31772, US), 'Shipment Agent' (Select...), 'Agent Service' (Select...), 'Prepayment %' (0%), 'Authorized' (\$0.00), and 'Balance' (\$0.00). The 'Attachments' tab is active, showing a table with columns: ATTACHMENT FILE, FILE TYPE, DATE, USER ID, FLOW TO TRANSACTION, and ATTACH TO EMAIL. The table lists three attachments: 'File Attachment', 'File Attachment (1)', and 'File Attachment (2)', all of type 'Image' and dated 'Nov 02, 2023'. The 'ATTACH TO EMAIL' column has checkboxes for each attachment. The 'ATTACH TO EMAIL' header is highlighted with a red box. The bottom of the table shows 'Rows per page: 10' and '1-3 of 3'.

Manually Including Attachments

When the "Attach To Email" checkbox is active, the chosen attachments will automatically be included in manually generated emails from the sales documents. Additionally, users can opt to upload new attachments or include existing ones that may have been omitted from the initial email, up to a maximum limit of 10 files.

This screenshot is similar to the previous one, but the 'ATTACH TO EMAIL' checkbox for 'File Attachment (1)' is checked. The top section shows the same order details. The 'Attachments' tab is active, and the table shows the same three attachments. The 'ATTACH TO EMAIL' column has checkboxes for each attachment, with 'File Attachment (1)' checked. The 'ATTACH TO EMAIL' header is highlighted with a red box. The bottom of the table shows 'Rows per page: 10' and '1-3 of 3'.

Including Attachments In Workflow

Within the workflow setup, there is a checkbox underneath the "Send Email Report" action that is titled "Email Attachments". When enabled, this action will automatically include any of the attachments marked as "Attach To Email" when sending the email via workflow.

The screenshot shows the 'Order Workflow' configuration page. The 'Send email report' action is selected, and the 'Email Attachments' checkbox is checked and highlighted with a red box. The interface includes a sidebar with 'Business Rules (3)' and 'Automatic Actions (0)', and a 'Publish Changes' button.

FAQs

What is upload limit for files?

The upload limit in Cavallo is 75mb. Users can still upload and download larger files in Business Central if needed.

What are the supported file types?

Cavallo supports the same file types as Business Central.

What is the size limit on emails?

25mb of files are permitted to be attached. This number reflects a combined total and not 25mb per file.

Are there any security settings needed to utilize this feature?

No additional security settings are needed in order to download and upload attachments, however there is a new setting for deleting attachments that is off by default. If users wish to delete attachments, they can do so by enabling this setting for select user groups.