



[Knowledgebase](#) > [SalesPad for BC](#) > [Mission Control](#) > [Mission Control Documentation](#) > [Mission Control: Automatic Actions](#)

Mission Control: Automatic Actions

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Automatic Actions

Automatic actions ensure that documents automatically continue in workflow if they meet specific criteria, eliminating manual user intervention. This gives business owners confidence that documents are moving through the pipeline, and it provides greater control and optimization for the entire process flow.

As an example, automatic actions are often used to automate backorder processing for sales orders:

- Orders that have backordered items wait for inventory in a backorder queue
- The system regularly checks whether there is available inventory for pending backorders
- Once inventory is available, the automation reserves needed items for backordered lines and submits those orders through workflow to be fulfilled

For general information on how to set up workflow, refer to [this documentation](#).

Setting Up Automatic Actions

To view, edit, and create automatic actions, click the Automatic Actions tab on the right side of the Workflows screen. The Automatic Actions popup shows all existing actions with quick details and enabled states available at a glance.

Action Name	Triggered	Disabled	Icon
Inventory Evaluation Evaluate if Inventory is Available to Reserve	Triggered	Disabled	→
Move to Pick Move to Pick if Reservation has Taken Place	Triggered	Disabled	→
Return to Backorder Return to back order if reservation failed	Triggered	Disabled	→
Reserve and move to pick	Periodic	Disabled	→
Move From Back Order Move Document From Back Order if Available stock is detected	Triggered	Disabled	→

To create a new automatic action, click the “+” button at the top right of the popup.

Automatic actions validate based on set conditions, which are set up the same way as conditions for workflow

queue pathing.

The evaluation policy determines when the action runs:

- Periodic - triggers on the indicated interval, e.g. every 15 minutes, every hour, every day
- Scheduled - triggers at a certain time on specific days of the week, e.g. at 5am on Mondays, Wednesdays, and Fridays
- Triggered - triggers immediately when documents enter the specified workflow queue

Applicable queues can be selected from a dropdown list, so actions can only affect documents in particular workflow steps.

The screenshot displays the CAVALLO Mission Control interface. On the left, the 'Workflows' tab is active, showing a list of workflow steps: 1 New Order, 2 Missing Reservations, 3 Reservation Holds, 4 Future Order HOLD, 5 Awaiting Assembly, 6 Backorder, 7 Inventory Reassignment, 8 Drop Ship, 9 Staging, 10 Pick Order, and 11 Ship Order. On the right, the 'New Automatic Action' modal is open. It contains the following fields and options:

- Name:** A text input field for naming the action.
- Description:** A text input field for describing the action.
- Action:** A dropdown menu with the selected option 'Documents will be submitted to the next queue when the automatic action executes.'
- Condition(s):** A section with an 'Add Condition +' button.
- Evaluation Policy:** A dropdown menu set to 'Periodic', with a sub-field 'Check for condition(s) every' set to '15 minutes'.
- Queues:** A dropdown menu labeled 'Select queues'.
- Enable automatic action:** A toggle switch that is currently turned on.
- Buttons:** 'Cancel' and 'Save' buttons at the bottom right.

When the automatic action runs, all documents that meet the outlined conditions in the specified queue will be submitted through workflow. This keeps documents moving automatically without any extra reviews or manual updates.

Move From Back Order

Setup

Action Log

How would you describe this automatic action?

Move Document From Back Order If Available stock is detected

↳ Documents will be **submitted to the next queue** when the automatic action executes.

◆ Which **Condition(s)** trigger this automatic action?

All of the line item's product.
All of the line item's product

Quantity Available

is more than or equal to

A field from the line item

Quantity

Add Condition +

■ Evaluation Policy

Periodic

Check for condition(s) every

15 minutes



■ Which **queues** should this automatic action apply to?

 Backorder

Delete

Cancel

Update

After making all the necessary changes, click the "Save" or "Update" button at the lower right, and then close the popup and click the "Publish Changes" button once ready to update Mission Control workflow in Business Central. Like changes to workflow, this immediately changes workflow behavior without users needing to refresh or log out and back in.

Note: There are no additional validation steps to publish a new/updated automatic action. Only grant workflow update access to trusted members of the organization.

Incorporating Automatic Actions in Workflow

Automatic actions may seem simple, but they can integrate with workflow and business rules in a multitude of ways to drive and control complex processes. For in-depth information on configuring automatic actions hand-in-hand with workflow to automate processes like backorders, drop ships, reservation reassignments, and more, check out the [Workflow Scenario Library](#).