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Mission Control: Automatic Actions

Cavallo Support - 2026-08-20 - [Mission Control Documentation](#)

Automatic Actions

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

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

- Documents that are waiting on items that have been backordered sit in a Backorder Queue.
- On a regular interval, checks are made to see if the backordered inventory has been received by the warehouse and can therefore be allocated.
- When the inventory is logged into the system, the next run of the Automatic Action will:
 - see the available inventory,
 - allocate those items to the orders that were waiting for them, and
 - then send them over to be picked.

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

Setting Up Automatic Actions

After clicking the Automatic Actions tab, which is located on the right hand side of the screen below the Business Rules tab, the user will see all automatic actions that have been previously created. Similar to business rules, clicking the “+” button will open up the New Automatic Action form.

Mission ControlWorkflowsCustom FieldsJM

Workflows > Order WorkflowOrder WorkflowCreated on Jul 31, 2023Publish Changes

Queues (7)

1New Order

2Order Details

3Pick Package

4Ship Package

5Create Invoice

6End

7HOLD

+Add New Queue

StartCreate order document

1New Order→2Order Details

2Order Details→3Pick Package

3Pick Package→4Ship Package

4Ship Package→5Create Invoice

5Create Invoice→6End

Business Rules (3)

Automatic Actions (1)

On this screen, users will need to fill out the name of the automatic action and to which queues it will apply. When the automatic action is triggered, all documents that meet the outlined conditions will be transitioned to the next configured queue. This will allow for continued movement for documents that are waiting in a given queue but now meet the criteria to continue on in workflow.

New Automatic Action

What's the name of this automatic action?

Fully Paid

How would you describe this automatic action?

Forward When Paid

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

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

A field from the order ▼

Balance ▼

is equal to ▼

A certain amount ▼

0.00

Add Condition +



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

 Select queues ▼

☒ Enable automatic action.

Check for condition(s) every

15 minutes ▼



Cancel

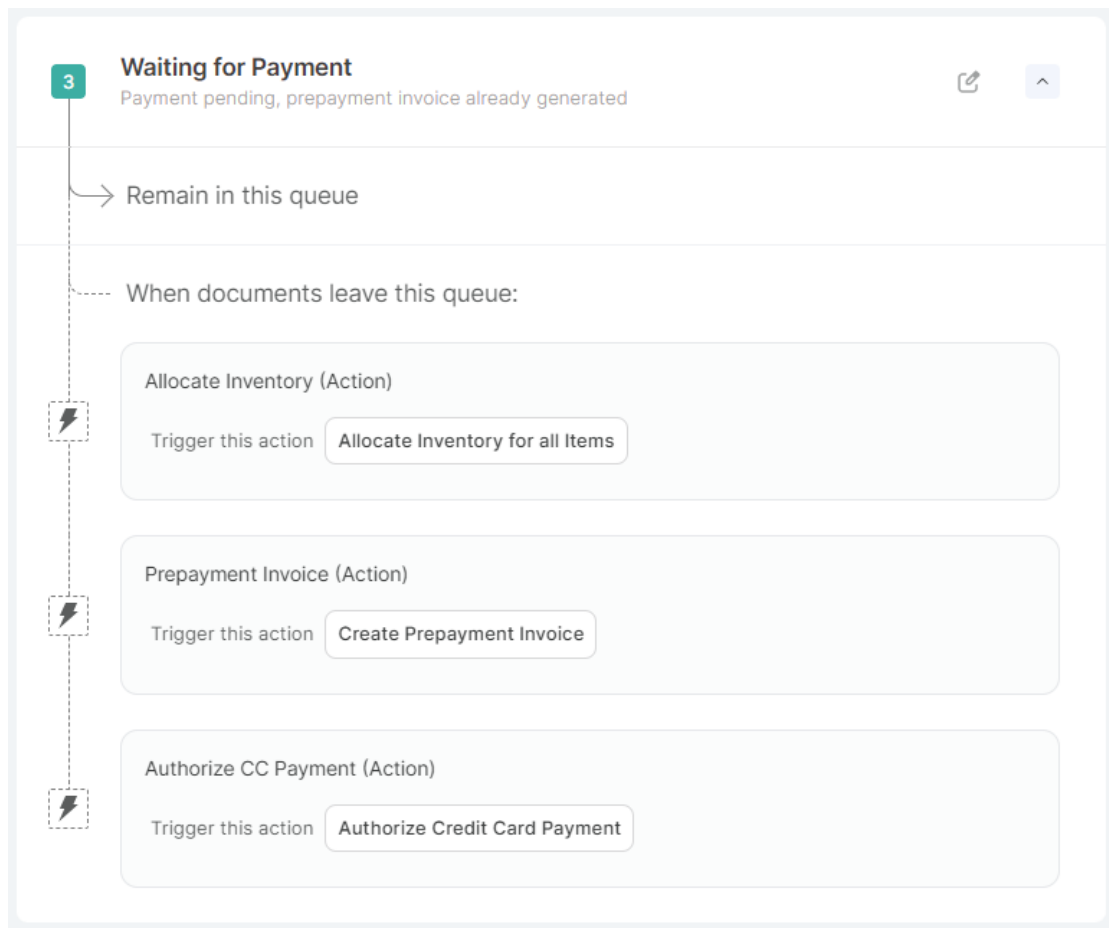
Save

Similar to any new or changed business rules, these changes will need to be saved and published before they take effect.

Example Automatic Action

Combining Automatic Actions and Alternate Path Actions can lead to a powerful processing engine that can allocate inventory, create a prepayment invoice, and authorize a credit card payment all in one action as the document sits in a “Waiting for Payment” queue. This could be accomplished by setting up the following in workflow:

Queue Setup:



Automatic Action Setup:

Prepayment/Allocate

Setup

Action Log

What's the name of this automatic action?

Prepayment/Allocate

How would you describe this automatic action?

Prepayment Collected & Inventory Allocated

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

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

Add Condition +

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

 Waiting for Payment

x v

Delete

Check for condition(s) every

24 hours



Cancel

Update