



## Mission Control: Bulk Actions

Megan De Freitas - 2024-12-03 - Mission Control Documentation

Cavallo Bulk Actions allows users to accelerate their quote to cash times by taking an action on several documents at the same time. When a bulk action is queued, the user is free to move around the application and continue working while Cavallo runs the job in the background. Upon completion, the user will receive a notification wherever they are working to alert them of the completion of their action. The below documentation shows where the bulk actions exist and how to leverage them!

## Bulk Actions

The screenshot shows the 'Documents' tab in the Cavallo Mission Control application. The interface includes a search bar, a table of documents, and a bulk actions bar. The table lists documents with columns for Doc Number, Customer, Doc Date, Margin, Related Docs, Status, Queue, Products, Cost, Total, Subtotal, and Open in EC. The bulk actions bar is located at the top right of the table, showing a 'New Document' button and a 'Submit' button. The table contains 10 rows of data, with the first row being S-QU01041 and the last row being S-ORD101041. The bulk actions bar is visible above the table, indicating that actions can be performed on the selected documents.

DOC NUMBER	CUSTOMER	DOC DATE	MARGIN	RELATED DOCS	STATUS	QUEUE	PRODUCTS	COST	TOTAL	SUBTOTAL	OPEN IN EC
S-QU01041	Adatum Corporati	Jul 27, 2023	22%	0		New Quotes	1	\$150.30	\$192.80	\$192.80	
S-QU01044	Adatum Corporati	Aug 16, 2023	-10%	0		New Quotes	2	\$733.92	\$667.21	\$667.21	
S-ORD101005	School of Fine A	Jul 19, 2023	22%	2	Released	over 1k	4	\$2,492.40	\$3,418.86	\$3,195.20	
S-ORD101013	Adatum Corporati	Oct 14, 2022	22%	1	Shipped	over 1k	1	\$780.70	\$1,060.85	\$1,000.80	
S-ORD101017	Adatum Corporati	Oct 14, 2022	10%	1	Partially	Rush Pick	2	\$931.00	\$1,101.17	\$1,093.52	
S-ORD101023	Adatum Corporati	Oct 14, 2022	22%	2	Allocated	Rush Pick	1	\$780.70	\$1,060.85	\$1,000.80	
S-ORD101025	Adatum Corporati	Oct 14, 2022	22%	3	Allocated	Over Credit Limit	3	\$1,269.20	\$1,724.83	\$1,627.20	
S-ORD101026	Adatum Corporati	Oct 14, 2022	22%	2	Partially	Over Credit Limit	3	\$3,903.50	\$5,004.00	\$5,004.00	
S-ORD101031	Adatum Corporati	Oct 14, 2022	22%	1	Released	over 1k	1	\$780.70	\$1,060.85	\$1,000.80	
S-ORD101041	Adatum Corporati	Oct 19, 2022	22%	2	Released	Over Credit Limit	1	\$780.70	\$1,060.85	\$1,000.80	

The bulk actions bar appears above many tables in Cavallo, and allows users to take actions on a group of selected documents. All of the actions act the same as they would on a workflow submit, but in single action form. The bulk actions bar is available in the below areas of the application on any tab that documents exist:



Mission ControlCustomersDocumentsProducts+

Documents (459)

New Document

Search by Doc NumberType to Search

1 documents selected

DOC NUMBER	CUSTOMER	DOC DATE	MARGIN	RELATED DOCS	STATUS	QUEUE	PRODUCTS	COST	
<input type="checkbox"/> S-QUO1041	A Adatum Corporati10000	Jul 27, 2023	22%	0		New Quotes	1	\$150.30	\$150.30
<input type="checkbox"/> S-QUO1044	A Adatum Corporati10000	Aug 16, 2023	-10%	0		New Quotes	2	\$733.92	\$6
<input type="checkbox"/> S-ORD101005	School of Fine A35000	Jul 19, 2023	22%	2	Released	+3 over 1k	4	\$2,492.40	\$3,418.86
<input type="checkbox"/> S-ORD101013	A Adatum Corporati10000	Oct 14, 2022	22%	1	Shipped	+1 over 1k	1	\$780.70	\$1,000.80
<input type="checkbox"/> S-ORD101017	A Adatum Corporati10000	Oct 14, 2022	10%	1	Partially	+1 Rush Pick	2	\$931.00	\$1,093.52
<input type="checkbox"/> S-ORD101023	A Adatum Corporati10000	Oct 14, 2022	22%	2	Allocated	+3 Rush Pick	1	\$780.70	\$1,000.80
<input type="checkbox"/> S-ORD101025	A Adatum Corporati10000	Oct 14, 2022	22%	3	Allocated	+2 Over Credit Limit	3	\$1,269.20	\$1,724.83
<input checked="" type="checkbox"/> S-ORD101026	A Adatum Corporati10000	Oct 14, 2022	22%	2	Partially	+3 Over Credit Limit	3	\$3,903.50	\$5,004.00
<input type="checkbox"/> S-ORD101031	A Adatum Corporati10000	Oct 14, 2022	22%	1	Released	+2 over 1k	1	\$780.70	\$1,000.80
<input type="checkbox"/> S-ORD101041	A Adatum Corporati10000	Oct 19, 2022	22%	2	Released	+4 Over Credit Limit	1	\$780.70	\$1,000.80

Rows per page: 101-10 of 459<123...48>

Actions

Submit

Allocate inventory

Cancel allocations

Delete Documents

Email

Generate picks

Generate purchase orders

Move documents

Post invoices

Document Search

# Bulk Actions Menu

## Actions Menu:

Mission ControlCustomersDocumentsProducts+

Documents (459)

New Document

Search by Doc NumberType to Search

1 documents selected

DOC NUMBER	CUSTOMER	DOC DATE	MARGIN	RELATED DOCS	STATUS	QUEUE	PRODUCTS	COST	TOTAL	SUBTOTAL	OPEN IN BC
<input type="checkbox"/> S-QUO1041	A Adatum Corporati10000	Jul 27, 2023	22%	0		New Quotes	1	\$150.30	\$192.80	\$192.80	
<input type="checkbox"/> S-QUO1044	A Adatum Corporati10000	Aug 16, 2023	-10%	0		New Quotes	2	\$733.92	\$667.21	\$667.21	
<input type="checkbox"/> S-ORD101005	School of Fine A35000	Jul 19, 2023	22%	2	Released	+3 over 1k	4	\$2,492.40	\$3,418.86	\$3,195.20	
<input type="checkbox"/> S-ORD101013	A Adatum Corporati10000	Oct 14, 2022	22%	1	Shipped	+1 over 1k	1	\$780.70	\$1,000.85	\$1,000.80	
<input type="checkbox"/> S-ORD101017	A Adatum Corporati10000	Oct 14, 2022	10%	1	Partially	+1 Rush Pick	2	\$931.00	\$1,181.17	\$1,093.52	
<input type="checkbox"/> S-ORD101023	A Adatum Corporati10000	Oct 14, 2022	22%	2	Allocated	+3 Rush Pick	1	\$780.70	\$1,000.85	\$1,000.80	
<input type="checkbox"/> S-ORD101025	A Adatum Corporati10000	Oct 14, 2022	22%	3	Allocated	+2 Over Credit Limit	3	\$1,269.20	\$1,724.83	\$1,627.20	
<input checked="" type="checkbox"/> S-ORD101026	A Adatum Corporati10000	Oct 14, 2022	22%	2	Partially	+3 Over Credit Limit	3	\$3,903.50	\$5,004.00	\$5,004.00	
<input type="checkbox"/> S-ORD101031	A Adatum Corporati10000	Oct 14, 2022	22%	1	Released	+2 over 1k	1	\$780.70	\$1,000.85	\$1,000.80	
<input type="checkbox"/> S-ORD101041	A Adatum Corporati10000	Oct 19, 2022	22%	2	Released	+4 Over Credit Limit	1	\$780.70	\$1,000.85	\$1,000.80	

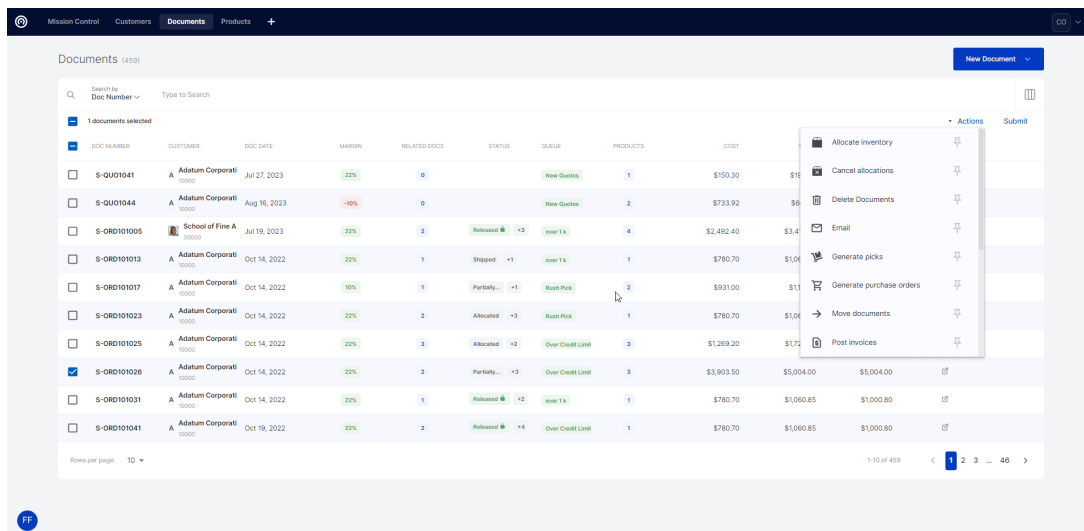
Rows per page: 101-10 of 459<123...48>

Actions

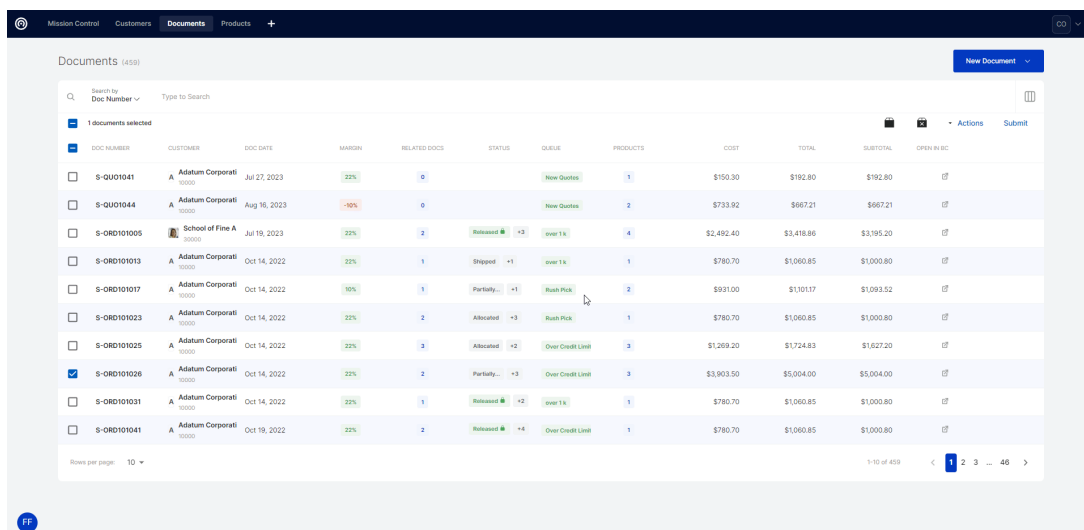
Submit

## Pinning Documents:

Users can pin up to 5 actions for quick access



Only actions available to the selected documents are displayed. In addition, these bulk actions respect the security settings that are created by admins per user group.



The last bulk action on the bar is our submit action. When taken, the selected documents will be submitted to the Cavallo workflow engine and run any associated actions on exit or entry to their new destinations. All business rule logic will be followed while evaluating the queue to queue movements.

## Available Bulk Actions

- **Allocate:** Attempts to allocate all inventory for the selected orders based on either the requested delivery date or the document date.
- **Cancel allocations:** Attempts to unallocate any inventory assigned to the selected orders
- **Reserve Inventory:** Attempts to reserve inventory against all the selected documents sales lines.
- **Remove Reservations:** Attempts to remove reservations on all selected documents sales lines.

- **Delete documents:** Attempts to delete any of the selected documents following the preset archiving configuration in Business Central.
- **Email:** Attempts to email out a specified report from the selected orders. Email addresses can use a preset or be manually entered.
- **Generate picks:** Attempts to create warehouse picks for the selected orders based on either the quantity allocated or the quantity available. The order that the selected documents are picked is also configurable on action window.
- **Generate purchase orders:** Attempts to purchase sales lines of the selected documents based on either backordered quantity or unallocated quantity.
- **Move documents:** Attempts to move the selected documents from their original queues to a new queue selected by the user.
- **Post invoices:** Attempts create and post a sales invoice for the selected documents
- **Post Shipments:** Attempts to create shipments for the allocated inventory or as much inventory as possible.
- **Post shipments and invoices:** Attempts to create a shipment and sales invoice at the same time for the selected documents.
- **Print:** Attempts to print a specific report for all of the selected documents.
- **Release documents:** Attempts release all of the selected documents
- **Reopen documents:** Attempts to reopen all of the selected documents
- **Take payments:** Attempts to run a credit card payment against the selected documents. Users can select an authorization, capture or a sale
- **Transfer to order:** Attempts to transfer all of the selected quotes to orders.

*Note: Users who utilize Cavallo's Allocation logic will only see allocations actions and vice versa for reservations users.*

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## Bulk Actions Error Handling

As a part of bulk actions, two errored states are present to handle any issues or errors. The user will be notified that one or more actions failed in a notification toast in addition to a red ! on the order in Mission Control. On hover, the red ! icon will reveal a pop up to explain the error and allow a user to navigate to the order. The user will also have the ability to see how many errors are present in each queue from a counter in the queue header. With each error, one of the following error states will be present as well:



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## FAQs

Do I have to wait until the actions are completed to perform tasks?

When a bulk action is triggered, it is processed in the background. This means users are still free to roam the application and operate as normal. A success or failure notification will appear when the action is completed no matter where the user is in our app.

Can I use bulk actions inside of Business Central?

Bulk actions are only available inside of Cavallo.

Do these actions follow Cavallo Security Settings?

Yes, normal security settings apply to bulk actions. If a user doesn't normally have the ability to generate a purchase order, the same will be true when using bulk actions.