



Mission Control: Bulk Actions

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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' page in the Cavallo Mission Control application. The page has a dark blue header with navigation tabs for 'Mission Control', 'Customers', 'Documents', and 'Products'. Below the header, there is a search bar and a 'New Document' button. The main content area displays a table of documents with columns for Doc Number, Customer, Doc Date, Margin, Related Docs, Status, Queue, Products, Cost, Total, Subtotal, and Open in BC. A bulk actions bar is visible above the table, containing icons for 'Actions' and 'Submit'. The table contains 10 rows of document data, including details like 'S-QUO1041', 'S-QUO1044', 'S-ORD101005', etc.

DOC NUMBER	CUSTOMER	DOC DATE	MARGIN	RELATED DOCS	STATUS	QUEUE	PRODUCTS	COST	TOTAL	SUBTOTAL	OPEN IN BC
S-QUO1041	Adatum Corporati	Jul 27, 2023	22%	0		New Quotes	1	\$150.30	\$192.80	\$192.80	🔗
S-QUO1044	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 Control Customers Documents Products +

All Workflows Last updated less than a min ago Refresh

Total Documents 430 Cost \$814,974.733 Total \$1,160,302.61

Approvals (5)

Search by Document Number Type to Search

1 documents selected

Actions Submit

DOC NUMBER	CLUST. PO NUMBER	CUSTOMER	DOC DATE	STATUS	RELATED DOCS	PRODUCTS	MARGIN	TOTAL	COST
New Orders (68)									
S-ORD101619	-	Adatum Corporati	Jul 24, 2023	Pending Pl.	+3	2	22%		
S-ORD101621	-	Adatum Corporati	Jul 24, 2023	Pending Pl.	+3	2	22%		
S-ORD101622	-	Adatum Corporati	Jul 24, 2023	Pending Pl.	+3	6	22%		
S-ORD101623	-	Adatum Corporati	Jul 24, 2023	Pending Pl.	+3	2	22%		
S-ORD101624	-	Adatum Corporati	Jul 24, 2023	Pending Pl.	+3	2	22%		
S-ORD101625	-	Adatum Corporati	Jul 24, 2023	Pending Pl.	+3	2	22%	\$1,503.00	\$1,928.00
S-ORD101626	-	Adatum Corporati	Jul 24, 2023	Released	+3	2	0%	\$0.00	\$0.00
S-ORD101627	-	Adatum Corporati	Jul 24, 2023	Allocated	0	1	22%	\$338.20	\$433.60
S-ORD101628	-	Adatum Corporati	Jul 24, 2023	Backordered	0	1	22%	\$740.50	\$950.50
S-ORD101630	-	Adatum Corporati	Jul 24, 2023	Allocated	0	1	22%	\$780.50	\$1,000.80
S-ORD101633	-	D DIMENSIONS TES	Jul 24, 2023	Allocated	0	1	0%	\$0.00	\$0.00

Actions: Allocate Inventory, Cancel allocations, Delete Documents, Email, Generate picks, Generate purchase orders, Move documents, Post Invoices

Mission Control

Mission Control Customers Documents Products +

Customers > Adatum Corporation

New Document

Open Documents (263) Products Posted Invoices Archived Documents Notes (12) Addresses Contacts Wallet About

Search by Document Number Type to Search

1 documents selected

Actions Submit

DOC NUMBER	DOC DATE	STATUS	MARGIN	COST	TOTAL
S-RETRD1010	Aug 14, 2023	No Products	0%	\$0.00	\$0.00
S-RETRD1009	Aug 14, 2023	No Products	-10%	\$733.92	\$707.24
S-RETRD1007	Mar 15, 2023	No Products	0%	\$0.00	\$0.00
S-RETRD1006	Mar 14, 2023	No Products	22%	\$780.70	\$1,060.85
S-RETRD1005	Mar 14, 2023	No Products	22%	\$780.70	\$1,060.85
S-RETRD1004	Mar 14, 2023	No Products	22%	\$780.70	\$1,060.85
S-RETRD1003	Dec 14, 2022	No Products	22%	\$780.70	\$1,060.85
S-RETRD1002	Dec 14, 2022	No Products	0%	\$0.00	\$0.00
S-RETRD1001	Nov 07, 2022	Released	22%	\$780.70	\$1,060.85
S-ORD101709	Aug 28, 2023	Allocated	+1	\$1,172.92	\$1,518.64

Rows per page: 10 1-10 of 263 1 2 3 ... 23

Actions: Allocate Inventory, Cancel allocations, Delete Documents, Email, Generate picks, Generate purchase orders, Move documents, Post Invoices

Customer Card

Mission Control Customers Documents Products +

Products > ATHENS Mobile Pedestal

ATHENS Mobile Pedestal

Description: ATHENS Mobile Pedestal

Type: Inventory

Base UOM: PCS

Unit Price: 433.6

Unit Cost: 338.2

Item Tracking

Replenishment

Open Documents (41) Inventory Archived Documents Posted Invoices

Search by Document Number Type to Search

41 documents selected

Actions Submit

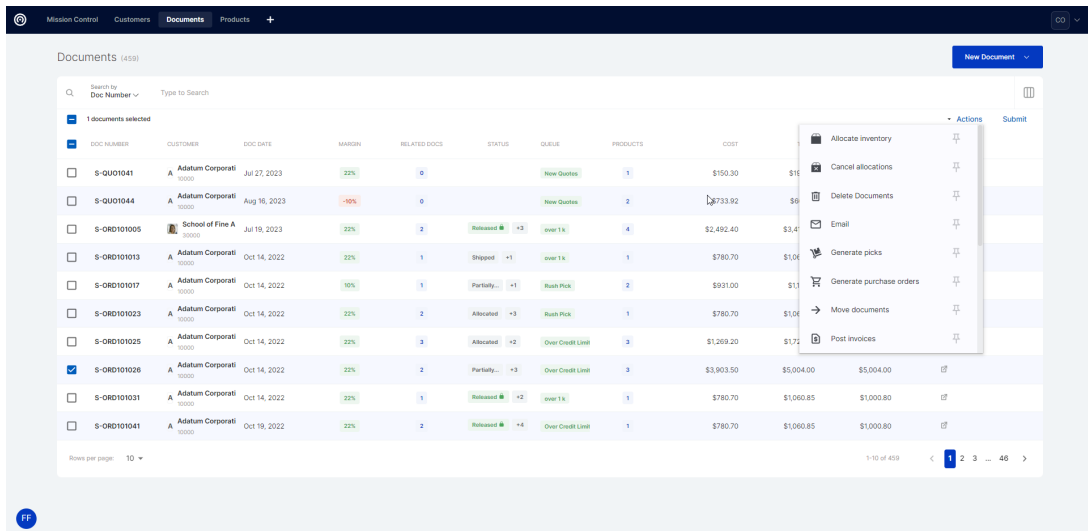
DOC NUMBER	CUSTOMER	DOC DATE	QUEUE	STATUS	MARGIN	TOTAL
S-INV102008	Relecloud	Jan 26, 2021	New Invoice		22%	
S-INV102021	Relecloud	Feb 23, 2021	New Invoice		22%	
S-INV102034	Relecloud	Mar 26, 2021	New Invoice		22%	
S-INV102046	Relecloud	Apr 25, 2021	New Invoice		22%	
S-INV102060	Relecloud	May 26, 2021	New Invoice		22%	
S-INV102072	Relecloud	Jun 25, 2021	New Invoice		22%	
S-INV102086	Relecloud	Jul 26, 2021	New Invoice		22%	
S-INV102100	Relecloud	Aug 26, 2021	New Invoice		22%	\$2,367.40
S-INV102112	Relecloud	Sep 25, 2021	New Invoice		22%	\$1,014.60
S-INV102126	Relecloud	Oct 26, 2021	New Invoice		22%	\$3,382.00

41 Documents \$32,576.13

Rows per page: 10 1-10 of 41 1 2 3 4 5

Actions: Allocate Inventory, Cancel allocations, Delete Documents, Email, Generate picks, Generate purchase orders, Move documents, Post Invoices

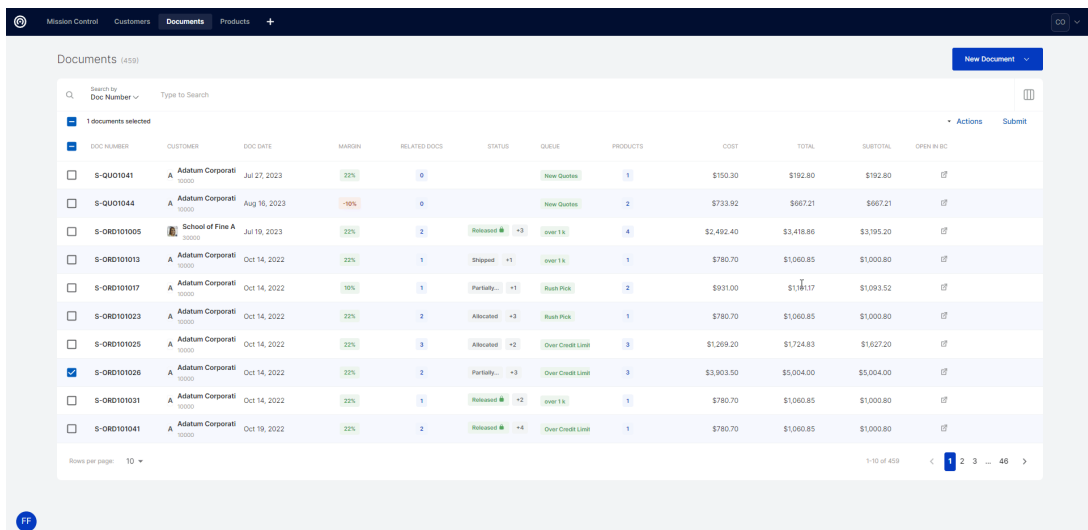
Product Card



Document Search

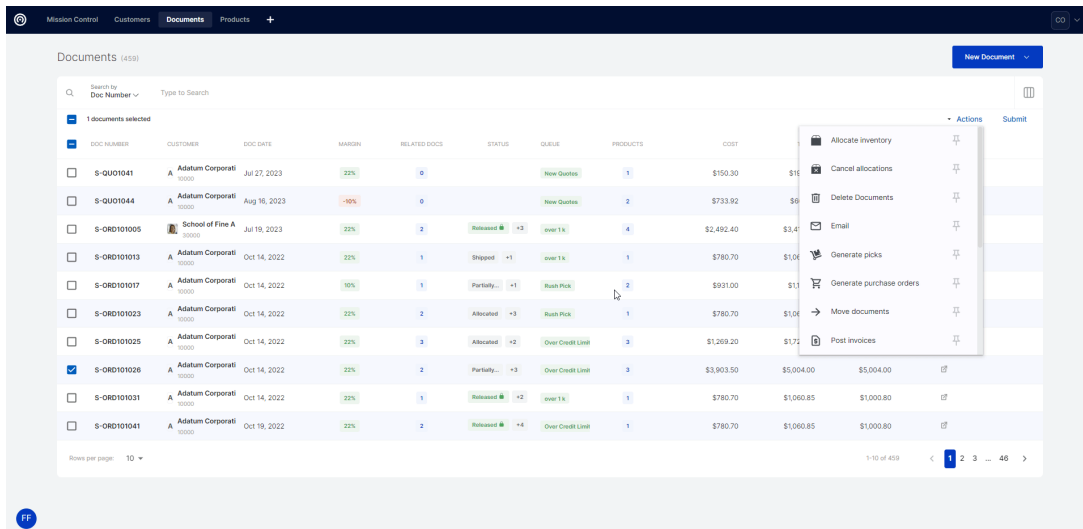
Bulk Actions Menu

Actions Menu:

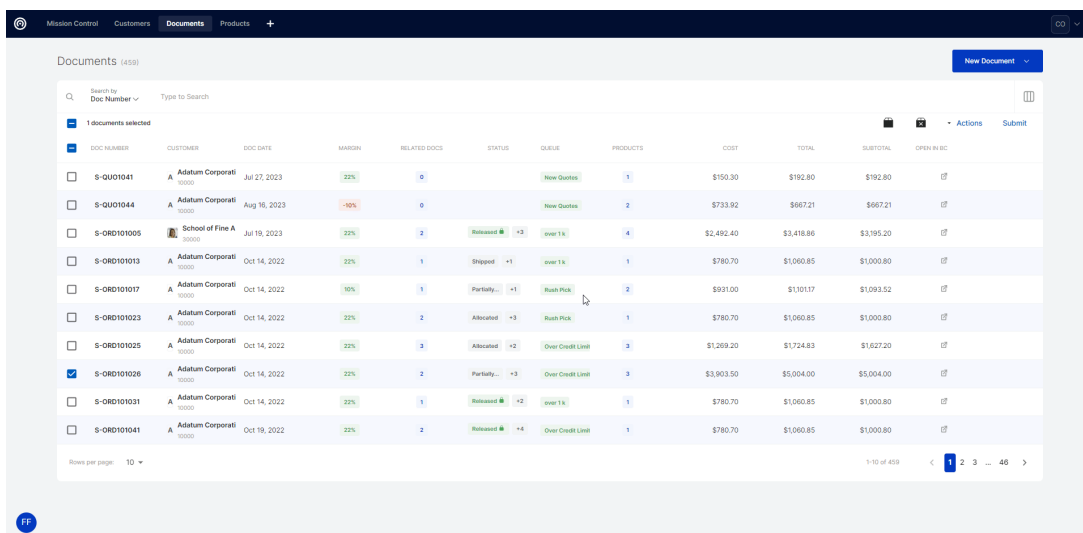


Pinning Documents:

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.

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:

Mission Control Customers Documents Products + Total Documents: 430

■ All Workflows Last updated less than a min ago Refresh

Bulk Actions Completed With Errors
One or more bulk actions have completed, please check your documents for any unresolved errors.

Search by Document Number Type to Search

Approvals (5)
Select All
Quote Workflow
Order Workflow

Workflows (13)
Select All
Quote Workflow
Order Workflow
Invoice Workflow
Return Workflow

DOC NUMBER	CLUST. PO NUMBER	CUSTOMER	DOC DATE	STATUS	RELATED DOCS	PRODUCTS	MARGIN	COST	TOTAL
▼ New Orders (53) Error (1)								\$48,414.697	\$79,641.20
▼ Over Credit Limit (3) Error (2)								\$2,830.60	\$3,848.53
▼ Back Ordered (6) Error (2)								\$7,445.60	\$221.00
▼ Rush Pick (4) Error (2)								\$3,273.10	\$4,233.86
▲ Warehouse (15) Error (1)								\$6,506.508	\$12,883.22
S-ORD101456	-	A Adatum Corporati 10000	Apr 17, 2023	Released +4	2	1	51%	\$780.70	\$1600.80
S-ORD101487	-	A Adatum Corporati 10000	Apr 17, 2023	Released +2	1	0	99%	\$84.70	\$7931.00
S-ORD101563	-	A Adatum Corporati 10000	Jun 14, 2023	Shipped +1	3	1	80%	\$20.00	\$50.00
S-ORD101569	-	A Adatum Corporati 10000	Jun 15, 2023	Released +4	2	1	-300%	\$60.00	\$15.00
S-ORD101572	-	A Adatum Corporati 10000	Jun 16, 2023	Allocated +3	2	1	-88%	\$780.70	\$100.00
S-ORD101573	-	A Adatum Corporati 10000	Aug 10, 2023	Allocated +2	2	1	-48%	\$780.70	\$99.00
S-ORD101608	-	A Adatum Corporati 10000	Jul 11, 2023	No Products	0	0	0%	\$0.00	\$0.00
S-ORD101633	-	D DIMENSIONS TES DIMENSIONS TES	Jul 24, 2023		0	1	0%	\$0.00	\$0.00

Permanent Error: Bulk Delete, Bulk Payments and Bulk Submit Only

A permanent error is designed to persist until the necessary corrective measures are implemented. These errors are crucial to the everyday functions of users and must remain to ensure they receive the necessary attention. Instances that would lead to a permanent error include unsuccessful attempts to delete, submit, or process payments.

Temporary Errors: All other bulk actions

Any action with the exception of Bulk Delete, Bulk Payment and Bulk Submit. The error type for temporary errors is called bulk actions. These errors will resolve by themselves in 24 hours if not handled and also will resolve with successful retry either bulk or single action.

Mission Control Customers Documents Products + Read-Only View (Document Pending Prepayment)

Customers > Adatum Corporation > Order

Order S-ORD101615 Adatum Corporation 10000 Created On: Jul 12, 2023 Pending Prepayment Allocated Needs Prepayment Submitted to Approval Process

New Order

Payment Terms	1M(8D)	Shipment Agent	Paid	\$0.00
Sell to Address	LEWES ROAD 2 Lewes Road Atlanta GA, 30372, US	Agent Service	Authorized	\$0.00
			Prepaid	\$0.00
			Balance	\$1,000.80

Products Activity Internal Notes (12) Payments Related Documents Errors 2 Open Inventory

2 Action Errors

ERROR TITLE	ERROR MESSAGE	ERROR TYPE	DATE
Bulk ship_and_invoice failed	Status must be equal to 'Open' in Sales Header: Document Type=Order, No.=S-ORD101615. Current value is 'Pending Prepayment'. CorrelationId: 704c9417-0149-474b-9d24-955c20c54d89.	Bulk Actions	Jul 12, 2023 9:28 AM
Bulk ship failed	Status must be equal to 'Open' in Sales Header: Document Type=Order, No.=S-ORD101615. Current value is 'Pending Prepayment'. CorrelationId: 2e139592-9d40-4933-8e06-ba9854c21b33.	Bulk Actions	Jul 12, 2023 9:24 AM

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.