



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' 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 at the top right of the table, containing icons for 'Actions' and 'Submit'. The table contains 10 rows of document data.

| 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 | 3 | 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 LOM 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

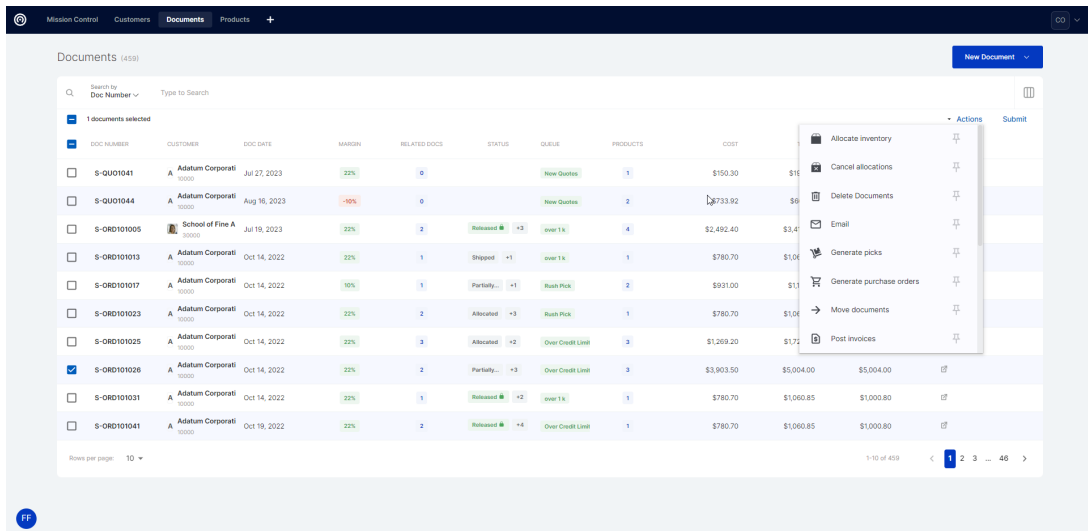
| DOC NUMBER | CUSTOMER | DOC DATE | QUEUE | STATUS | MARGIN | TOTAL |
|-------------|-----------|--------------|-------------|--------|--------|------------|
| S-INV102008 | Relecloud | Jan 26, 2021 | New Invoice | | 22% | |
| S-INV102021 | Relecloud | Feb 23, 2021 | New Invoice | | 22% | |
| S-INV102034 | 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

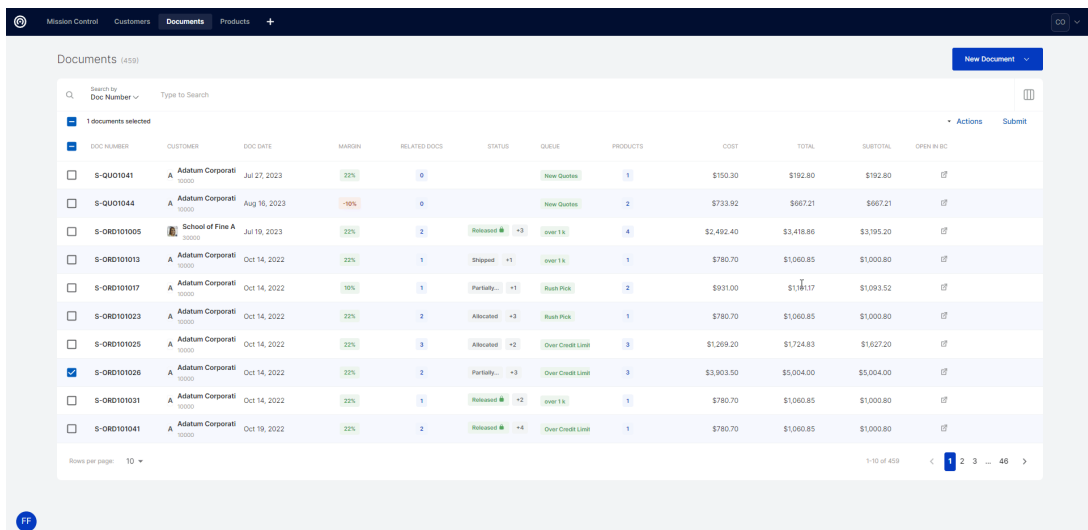
Product Card



Document Search

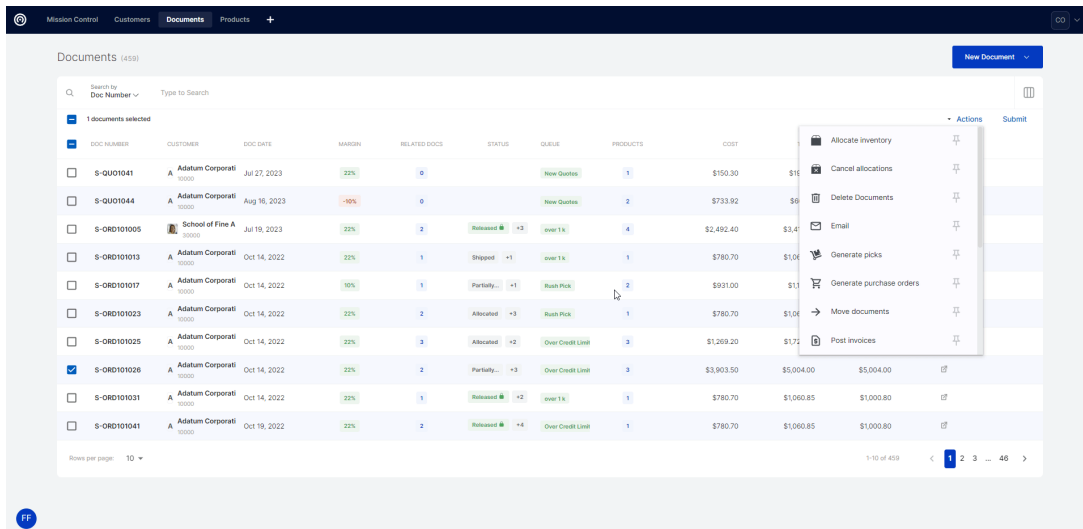
Bulk Actions Menu

Actions Menu:

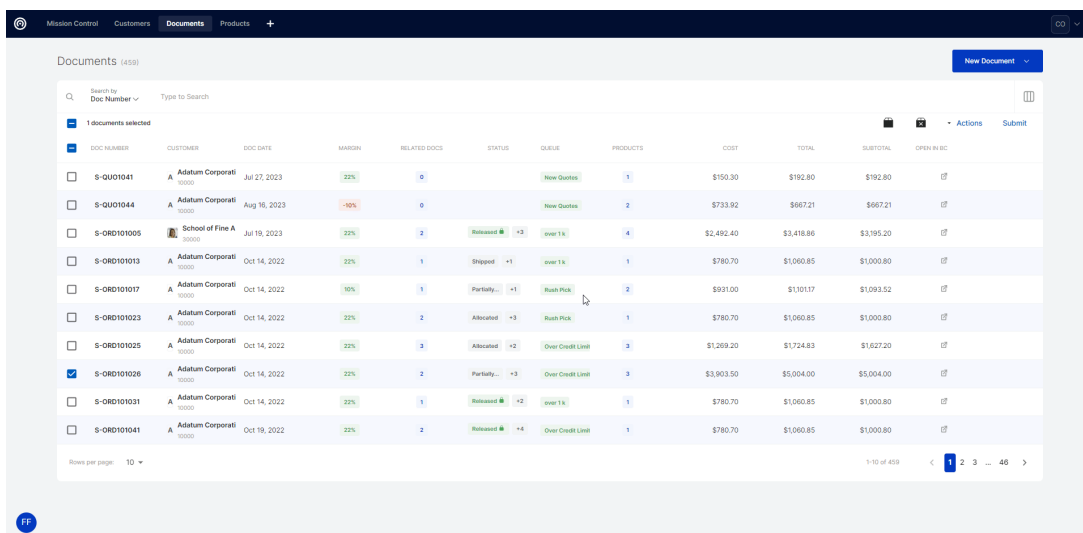


Pinning Documents:

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 DIMENSIONAL TECTIVE | 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

Payment Terms 1M(8D) Shipment Agent
Sell to Address LEWES ROAD 2 Lewes Road Atlanta GA, 31772, US Agent Service

Paid \$0.00
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.