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Mission Control: Bulk Actions

Cavallo Support - 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 Mission Control interface. A table lists various 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 a search bar, a 'Type to Search' dropdown, and a 'New Document' button. The table contains 10 rows of data, with the first row being S-QUO1041 and the last row being S-ORD101841. The bulk actions bar is positioned above the table, and the table is scrollable.

DOC NUMBER	CUSTOMER	DOC DATE	MARGIN	RELATED DOCS	STATUS	QUEUE	PRODUCTS	COST	TOTAL	SUBTOTAL	OPEN IN BC
S-QUO1041	A Adatum Corporati	Jul 27, 2023	22%	0	New Quotes	1	1	\$150.30	\$192.80	\$192.80	
S-QUO1044	A Adatum Corporati	Aug 16, 2023	-10%	0	New Quotes	2	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	A Adatum Corporati	Oct 14, 2022	22%	1	Shipped	over 1k	1	\$780.70	\$1,060.85	\$1,000.80	
S-ORD101017	A Adatum Corporati	Oct 14, 2022	20%	1	Partially...	Rush Pick	2	\$931.00	\$1,101.17	\$1,093.52	
S-ORD101023	A Adatum Corporati	Oct 14, 2022	22%	2	Allocated	Rush Pick	1	\$780.70	\$1,060.85	\$1,000.80	
S-ORD101025	A Adatum Corporati	Oct 14, 2022	22%	3	Allocated	Over Credit Limit	3	\$1,269.20	\$1,724.83	\$1,627.20	
S-ORD101026	A Adatum Corporati	Oct 14, 2022	22%	2	Partially...	Over Credit Limit	3	\$3,903.50	\$5,004.00	\$5,004.00	
S-ORD101031	A Adatum Corporati	Oct 14, 2022	22%	1	Released	over 1k	1	\$780.70	\$1,060.85	\$1,000.80	
S-ORD101841	A 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:

The screenshot shows the 'Workflows' tab in the Mission Control interface. A table lists various workflows with columns for Doc Number, Cust. PO Number, Customer, Doc Date, Status, Related Docs, Products, Margin, and Total. A bulk actions bar is visible above the table, containing a search bar, a 'Type to Search' dropdown, and a 'New Document' button. The table contains 10 rows of data, with the first row being S-ORD101619 and the last row being S-ORD101633. The bulk actions bar is positioned above the table, and the table is scrollable.

DOC NUMBER	CUST. PO NUMBER	CUSTOMER	DOC DATE	STATUS	RELATED DOCS	PRODUCTS	MARGIN	TOTAL
S-ORD101619	-	A Adatum Corporati	Jul 24, 2023	Pending Pr...	+3	2	22%	
S-ORD101621	-	A Adatum Corporati	Jul 24, 2023	Pending Pr...	+3	3	22%	
S-ORD101622	-	A Adatum Corporati	Jul 24, 2023	Pending Pr...	+3	4	22%	
S-ORD101623	-	A Adatum Corporati	Jul 24, 2023	Pending Pr...	+3	2	22%	
S-ORD101624	-	A Adatum Corporati	Jul 24, 2023	Pending Pr...	+3	1	22%	
S-ORD101625	-	A Adatum Corporati	Jul 24, 2023	Pending Pr...	+3	2	22%	\$1,503.00 \$1,928.00
S-ORD101626	-	A Adatum Corporati	Jul 24, 2023	Released	+3	2	0%	\$0.00 \$0.00
S-ORD101627	-	A Adatum Corporati	Jul 24, 2023	Allocated	0	1	22%	\$338.20 \$433.60
S-ORD101628	-	A Adatum Corporati	Jul 24, 2023	Backordered	0	1	22%	\$740.50 \$950.50
S-ORD101630	-	A Adatum Corporati	Jul 24, 2023	Allocated	0	1	22%	\$780.70 \$1,000.80
S-ORD101633	-	D DIMENSIONS TES	Jul 24, 2023		0	1	0%	\$0.00 \$0.00

Mission Control

Mission Control

Customers

Documents

Products

+

CO

Customers > Adatum Corporation

A

Adatum Corporation

Over. Bus. Posting Group

DOMESTIC

Website

cavallo.com

Tax Area

AVATAX

Currency

Canadian dollar (C\$)

Balance

\$60,886.47

Payment Terms

1M(BD)

Payment Method

CARD

Address

Primary Address

2 Lenoir Road

Atlanta, GA, 31172, US

Shipping Address

2 Lenoir Road

Atlanta, GA, 31172, US

Open Documents (263)

Products

Posted Invoices

Archived Documents

Notes (12)

Addresses

Contacts

Wallet

About

Search by Document Number

ord

1 documents selected

DOC NUMBER	DOC DATE	STATUS	MARGIN	COST	TOTAL
S-RETORD1010	Aug 14, 2023	No Products	0%	\$0.00	\$0.00
S-RETORD1009	Aug 14, 2023	No Products	-10%	\$733.92	\$707.24
S-RETORD1007	Mar 15, 2023	No Products	0%	\$0.00	\$0.00
S-RETORD1006	Mar 14, 2023	No Products	22%	\$780.70	\$1,060.85
S-RETORD1005	Mar 14, 2023	No Products	22%	\$780.70	\$1,060.85
S-RETORD1004	Mar 14, 2023	No Products	22%	\$780.70	\$1,060.85
S-RETORD1003	Dec 14, 2022	No Products	22%	\$780.70	\$1,060.85
S-RETORD1002	Dec 14, 2022	No Products	0%	\$0.00	\$0.00
S-RETORD1001	Nov 07, 2022	Released	22%	\$780.70	\$1,060.85
S-ORD101709	Aug 28, 2023	Allocated	+1	\$1,172.92	\$1,318.64

Rows per page: 10

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Actions

Submit

Allocate Inventory

Cancel allocations

Delete Documents

Email

Generate picks

Generate purchase orders

Move documents

Post Invoices

Customer Card

Mission Control

Customers

Documents

Products

+

CO

Products > ATHENS Mobile Pedestal

ATHENS Mobile Pedestal

Description

ATHENS Mobile Pedestal

Type

Inventory

Base UOM

PCS

Base Price

433.6

Unit Cost

338.2

Item Tracking

Replacement

Open Documents (41)

Inventory

Archived Documents

Posted Invoices

Search by Document Number

Type to Search

41 documents selected

DOC NUMBER	CUSTOMER	DOC DATE	QUEUE	STATUS	MARGIN
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%
S-INV102112	Relecloud	Sep 25, 2021	New Invoice		22%
S-INV102126	Relecloud	Oct 26, 2021	New Invoice		22%

41 Documents

Rows per page: 10

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Actions

Submit

Allocate Inventory

Cancel allocations

Delete Documents

Email

Generate picks

Generate purchase orders

Move documents

Post Invoices

Product Card

Mission Control

Customers

Documents

Products

+

CO

Documents (459)

Search by Doc Number

Type to Search

1 documents selected

DOC NUMBER	CUSTOMER	DOC DATE	MARGIN	RELATED DOCS	STATUS	QUEUE	PRODUCTS	COST
S-QUO1041	Adatum Corporati	Jul 27, 2023	22%	0	New Quotes		1	\$150.30
S-QUO1044	Adatum Corporati	Aug 16, 2023	-10%	0	New Quotes		2	\$733.92
S-ORD101005	School of Fine A	Jul 19, 2023	22%	2	Released	over 1k	4	\$2,492.40
S-ORD101013	Adatum Corporati	Oct 14, 2022	22%	1	Shipped	over 1k	1	\$780.70
S-ORD101017	Adatum Corporati	Oct 14, 2022	10%	1	Partially...	over 1k	2	\$931.00
S-ORD101023	Adatum Corporati	Oct 14, 2022	22%	2	Allocated	over 1k	1	\$780.70
S-ORD101025	Adatum Corporati	Oct 14, 2022	22%	3	Allocated	Over Credit Limit	3	\$1,269.20
S-ORD101026	Adatum Corporati	Oct 14, 2022	22%	2	Partially...	Over Credit Limit	3	\$3,903.50
S-ORD101031	Adatum Corporati	Oct 14, 2022	22%	1	Released	over 1k	1	\$780.70
S-ORD101041	Adatum Corporati	Oct 19, 2022	22%	2	Released	Over Credit Limit	1	\$780.70

Rows per page: 10

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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:

Documents (459)

Search by Doc Number Type to Search

1 documents selected

Actions Submit

DOC NUMBER	CUSTOMER	DOC DATE	MARGIN	RELATED DOCS	STATUS	QUEUE	PRODUCTS	COST	TOTAL	SUBTOTAL	OPEN IN BC
S-QUO1041	A Adatum Corporati	Jul 27, 2023	22%	0		New Quotes	1	\$150.30	\$192.80	\$192.80	
S-QUO1044	A 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	A Adatum Corporati	Oct 14, 2022	22%	1	Shipped	over 1k	1	\$780.70	\$1,060.85	\$1,000.80	
S-ORD101017	A Adatum Corporati	Oct 14, 2022	10%	1	Partially...	Rush Pick	2	\$931.00	\$1,181.17	\$1,093.52	
S-ORD101023	A Adatum Corporati	Oct 14, 2022	22%	2	Allocated	Rush Pick	1	\$780.70	\$1,060.85	\$1,000.80	
S-ORD101025	A Adatum Corporati	Oct 14, 2022	22%	3	Allocated	Over Credit Limit	3	\$1,269.20	\$1,724.83	\$1,627.20	
S-ORD101026	A Adatum Corporati	Oct 14, 2022	22%	2	Partially...	Over Credit Limit	3	\$3,903.50	\$5,004.00	\$5,004.00	
S-ORD101031	A Adatum Corporati	Oct 14, 2022	22%	1	Released	over 1k	1	\$780.70	\$1,060.85	\$1,000.80	
S-ORD101041	A Adatum Corporati	Oct 19, 2022	22%	2	Released	Over Credit Limit	1	\$780.70	\$1,060.85	\$1,000.80	

Rows per page: 10

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Pinning Documents:

Users can pin up to 5 actions for quick access

Documents (459)

Search by Doc Number Type to Search

1 documents selected

Actions Submit

DOC NUMBER	CUSTOMER	DOC DATE	MARGIN	RELATED DOCS	STATUS	QUEUE	PRODUCTS	COST	TOTAL	SUBTOTAL	OPEN IN BC
S-QUO1041	A Adatum Corporati	Jul 27, 2023	22%	0		New Quotes	1	\$150.30	\$192.80	\$192.80	
S-QUO1044	A 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	A Adatum Corporati	Oct 14, 2022	22%	1	Shipped	over 1k	1	\$780.70	\$1,060.85	\$1,000.80	
S-ORD101017	A Adatum Corporati	Oct 14, 2022	10%	1	Partially...	Rush Pick	2	\$931.00	\$1,181.17	\$1,093.52	
S-ORD101023	A Adatum Corporati	Oct 14, 2022	22%	2	Allocated	Rush Pick	1	\$780.70	\$1,060.85	\$1,000.80	
S-ORD101025	A Adatum Corporati	Oct 14, 2022	22%	3	Allocated	Over Credit Limit	3	\$1,269.20	\$1,724.83	\$1,627.20	
S-ORD101026	A Adatum Corporati	Oct 14, 2022	22%	2	Partially...	Over Credit Limit	3	\$3,903.50	\$5,004.00	\$5,004.00	
S-ORD101031	A Adatum Corporati	Oct 14, 2022	22%	1	Released	over 1k	1	\$780.70	\$1,060.85	\$1,000.80	
S-ORD101041	A Adatum Corporati	Oct 19, 2022	22%	2	Released	Over Credit Limit	1	\$780.70	\$1,060.85	\$1,000.80	

Rows per page: 10

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- Allocate inventory
- Cancel allocations
- Delete Documents
- Email
- Generate picks
- Generate purchase orders
- Move documents
- Post invoices

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.

Mission Control
Customers
Documents
Products
+

Documents (459)
New Document

Search by Doc Number
Type 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 Corporati 10000	Jul 27, 2023	22%	0		New Quotes	1	\$150.30	\$192.80	\$192.80	
<input type="checkbox"/> S-QUO1044	A Adatum Corporati 10000	Aug 16, 2023	-10%	0		New Quotes	2	\$733.92	\$667.21	\$667.21	
<input type="checkbox"/> S-ORD101005	S School of Fine A 10000	Jul 19, 2023	22%	2	Released # +3	over 1x	4	\$2,492.40	\$3,418.86	\$3,195.20	
<input type="checkbox"/> S-ORD101013	A Adatum Corporati 10000	Oct 14, 2022	22%	1	Shipped +1	over 1x	1	\$780.70	\$1,060.85	\$1,000.80	
<input type="checkbox"/> S-ORD101017	A Adatum Corporati 10000	Oct 14, 2022	30%	1	Partially... +1	Push Pick	2	\$931.00	\$1,101.17	\$1,093.52	
<input type="checkbox"/> S-ORD101023	A Adatum Corporati 10000	Oct 14, 2022	22%	2	Allocated +3	Push Pick	1	\$780.70	\$1,060.85	\$1,000.80	
<input type="checkbox"/> S-ORD101025	A Adatum Corporati 10000	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 Corporati 10000	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 Corporati 10000	Oct 14, 2022	22%	1	Released # +2	over 1x	1	\$780.70	\$1,060.85	\$1,000.80	
<input type="checkbox"/> S-ORD101041	A Adatum Corporati 10000	Oct 19, 2022	22%	2	Released # +4	Over Credit Limit	1	\$780.70	\$1,060.85	\$1,000.80	

Rows per page 10
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1 2 3 ... 46 >

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

CustomersDocumentsProducts

All Workflows

Last updated Less than a min ago

Refresh

Total Documents 450

Bulk Actions Completed With Errors

One or more bulk actions have completed, please check your documents for any unresolved errors

Actions

Submit

Approvals (5)

Search

Select All

Quote Workflow

Order Workflow

Workflows (13)

Search

Select All

Quote Workflow

Order Workflow

Invoice Workflow

Return Workflow

DOC NUMBER

CUST. PO NUMBER

CUSTOMER

DOC DATE

STATUS

RELATED DOCS

PRODUCTS

MARGIN

COST

TOTAL

New Orders (53)

Over Credit Limit (3)

Back Ordered (6)

Rush Pick (4)

Warehouse (15)

S-ORD101456

S-ORD101457

S-ORD101563

S-ORD101569

S-ORD101572

S-ORD101573

S-ORD101608

S-ORD101633

Adatum Corporati

Adatum Corporati

Adatum Corporati

Adatum Corporati

Adatum Corporati

Adatum Corporati

Adatum Corporati

DIMENSIONS TES

Released

Released

Shipped

Released

Allocated

Allocated

No Products

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450

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 ControlCustomersDocumentsProducts+

Read-Only View (Document Pending Prepayment)

Customers > Adatum Corporation > Order

Order S-ORD101615Adatum Corporation10000Created On Jul 12, 2023Pending PrepaymentAllocatedNeeds Prepayment

New Order

Payment TermsIM(80)

Sell to AddressLEWES ROAD2 Lewes RoadAbolita CA, 91772, US

Shipment AgentAgent Service

Paid\$0.00Authorized\$0.00Prepaid\$0.00Balance\$1,000.80

ProductsActivityInternal Notes (12)PaymentsRelated DocumentsErrorsOpen Inventory

2 Action ErrorsNewest First

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: 704c9417-0146-474b-9a24-5b5c82dc4d9.	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: 2e13f692-d4a0-4933-ae6b-ba9b854231b3.	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.