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# 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 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 located at the top right of the table, above the 'Actions' column header.

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, and MARGIN. 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 located at the top right of the table, above the 'Actions' column header.

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

\$90,886.47

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

22%

\$780.70

\$1,060.85

S-RETORD1005

Mar 14, 2023

22%

\$780.70

\$1,060.85

S-RETORD1004

Mar 14, 2023

22%

\$780.70

\$1,060.85

S-RETORD1003

Dec 14, 2022

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

22%

\$1,172.92

\$1,318.64

Rows per page: 10

1-10 of 222

1

2

3

...

23

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

Jan 26, 2021

New Invoice

22%

S-INV102021

Feb 23, 2021

New Invoice

22%

S-INV102034

Mar 26, 2021

New Invoice

22%

S-INV102046

Apr 25, 2021

New Invoice

22%

S-INV102060

May 26, 2021

New Invoice

22%

S-INV102072

Jun 25, 2021

New Invoice

22%

S-INV102086

Jul 26, 2021

New Invoice

22%

S-INV102100

Aug 26, 2021

New Invoice

22%

S-INV102112

Sep 25, 2021

New Invoice

22%

S-INV102126

Oct 26, 2021

New Invoice

22%

41 Documents

\$32,576.13

Rows per page: 10

1-10 of 41

1

2

3

4

5

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

A

Adatum Corporati

10000

Jul 27, 2023

22%

0

New Quotes

1

\$150.30

\$150.30

S-QUO1044

A

Adatum Corporati

10000

Aug 16, 2023

-10%

0

New Quotes

2

\$733.92

\$807.71

S-ORD101005

School of Fine A

30000

Jul 19, 2023

22%

2

Released

+3

over 1k

4

\$2,492.40

\$3,400.00

S-ORD101013

Adatum Corporati

10000

Oct 14, 2022

22%

1

Shipped

+1

over 1k

1

\$780.70

\$1,060.85

S-ORD101017

Adatum Corporati

10000

Oct 14, 2022

10%

1

Partially...

+1

Rush Pick

2

\$931.00

\$1,060.85

S-ORD101023

Adatum Corporati

10000

Oct 14, 2022

22%

2

Allocated

+3

Rush Pick

1

\$780.70

\$1,060.85

S-ORD101025

Adatum Corporati

10000

Oct 14, 2022

22%

3

Allocated

+2

Over Credit Limit

3

\$1,269.20

\$1,720.00

S-ORD101026

Adatum Corporati

10000

Oct 14, 2022

22%

2

Partially...

+3

Over Credit Limit

3

\$3,903.50

\$5,004.00

S-ORD101031

Adatum Corporati

10000

Oct 14, 2022

22%

1

Released

+2

over 1k

1

\$780.70

\$1,060.85

S-ORD101041

Adatum Corporati

10000

Oct 19, 2022

22%

2

Released

+4

Over Credit Limit

1

\$780.70

\$1,060.85

Rows per page: 10

1-10 of 459

1

2

3

...

46

Actions

Submit

Allocate Inventory

Cancel allocations

Delete Documents

Email

Generate picks

Generate purchase orders

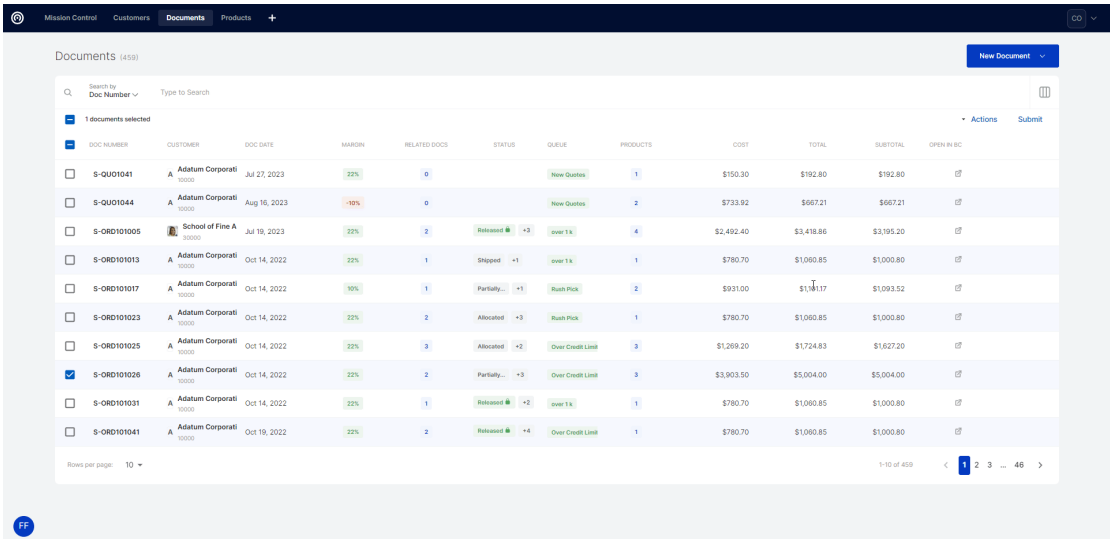
Move documents

Post Invoices

## Document Search

# Bulk Actions Menu

## Actions Menu:

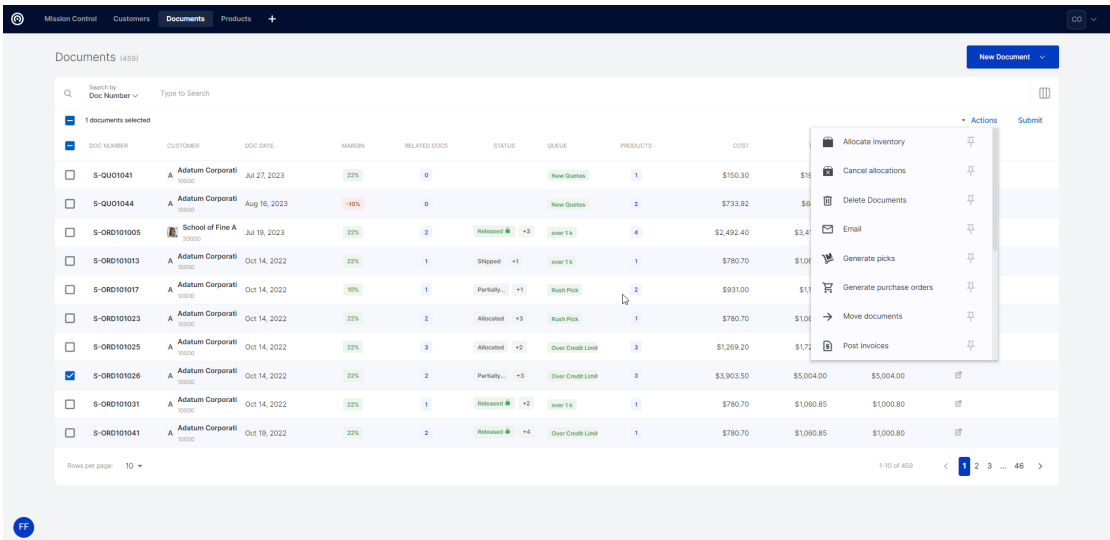


The screenshot shows a table of documents with columns: DOC NUMBER, CUSTOMER, DOC DATE, MARGIN, RELATED DOCS, STATUS, QUEUE, PRODUCTS, COST, TOTAL, SUBTOTAL, and OPEN IN BC. A search bar at the top left allows filtering by Doc Number. A 'New Document' button is at the top right. A '1 documents selected' indicator is shown. The table lists documents with various statuses like 'New Quotes', 'Released', 'Shipped', 'Partially...', 'Allocated', and 'Over Credit Limit'. A 'Bulk Actions' menu is open, showing options: 'Allocate inventory', 'Cancel allocations', 'Delete Documents', 'Email', 'Generate picks', 'Generate purchase orders', 'Move documents', and 'Post invoices'. The table has 10 rows per page and 46 documents in total.

DOC NUMBER	CUSTOMER	DOC DATE	MARGIN	RELATED DOCS	STATUS	QUEUE	PRODUCTS	COST	TOTAL	SUBTOTAL	OPEN IN BC
S-QUOI041	A Adatum Corporati	Jul 27, 2023	22%	0		New Quotes	1	\$150.30	\$192.80	\$192.80	
S-QUOI044	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	

## Pinning Documents:

Users can pin up to 5 actions for quick access



The screenshot shows the same table as above, but with a 'Bulk Actions' menu open. The menu options are: 'Allocate inventory', 'Cancel allocations', 'Delete Documents', 'Email', 'Generate picks', 'Generate purchase orders', 'Move documents', and 'Post invoices'. The table has 10 rows per page and 46 documents in total.

DOC NUMBER	CUSTOMER	DOC DATE	MARGIN	RELATED DOCS	STATUS	QUEUE	PRODUCTS	COST	TOTAL	SUBTOTAL	OPEN IN BC
S-QUOI041	A Adatum Corporati	Jul 27, 2023	22%	0		New Quotes	1	\$150.30	\$192.80	\$192.80	
S-QUOI044	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	

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	Actions
S-QUO1041	A Adatum Corporati 10000	Jul 27, 2023	22%	0		New Quotes	1	\$150.30	\$192.80	\$192.80		
S-QUO1044	A Adatum Corporati 10000	Aug 16, 2023	-10%	0		New Quotes	2	\$733.92	\$667.21	\$667.21		
S-ORD101005	School of Fine A 10000	Jul 19, 2023	22%	2	Released	over 1k	4	\$2,492.40	\$3,418.86	\$3,195.20		
S-ORD101013	A Adatum Corporati 10000	Oct 14, 2022	22%	1	Shipped	over 1k	1	\$780.70	\$1,060.85	\$1,000.80		
S-ORD101017	A Adatum Corporati 10000	Oct 14, 2022	30%	1	Partially...	Push Pick	2	\$931.00	\$1,101.17	\$1,093.52		
S-ORD101023	A Adatum Corporati 10000	Oct 14, 2022	22%	2	Allocated	Push Pick	1	\$780.70	\$1,060.85	\$1,000.80		
S-ORD101025	A Adatum Corporati 10000	Oct 14, 2022	22%	3	Allocated	Over Credit Limit	3	\$1,269.20	\$1,724.83	\$1,627.20		
S-ORD101026	A Adatum Corporati 10000	Oct 14, 2022	22%	2	Partially...	Over Credit Limit	3	\$3,903.50	\$5,004.00	\$5,004.00		
S-ORD101031	A Adatum Corporati 10000	Oct 14, 2022	22%	1	Released	over 1k	1	\$780.70	\$1,060.85	\$1,000.80		
S-ORD101041	A Adatum Corporati 10000	Oct 19, 2022	22%	2	Released	Over Credit Limit	1	\$780.70	\$1,060.85	\$1,000.80		

Rows per page: 10
1-10 of 459
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

Search by Document Number

Type to Search

	DOC NUMBER	CUST. PO NUMBER	CUSTOMER	DOC DATE	STATUS	RELATED DOCS	PRODUCTS	MARGIN	COST	TOTAL	
	New Orders (53)	Error (16)							\$48,414.897	\$79,641.20	
	Over Credit Limit (3)	Error (3)							\$2,830.60	\$3,846.53	
	Back Ordered (6)	Error (6)							\$7,245.60	\$221.00	
	Rush Pick (4)	Error (2)							\$3,273.10	\$4,233.68	
	Warehouse (15)	Error (7)							\$6,506.508	\$12,863.22	
	S-ORD101456	-	A Adatum Corporati	Apr 17, 2023	Released	+4	2	1	51%	\$780.70	\$1,600.80
	S-ORD101457	-	A Adatum Corporati	Apr 17, 2023	Released	+2	1	0	99%	\$84.70	\$7,931.00
	S-ORD101563	-	A Adatum Corporati	Jun 14, 2023	Shipped	+1	3	1	60%	\$20.00	\$50.00
	S-ORD101569	-	A Adatum Corporati	Jun 15, 2023	Released	+4	2	1	-300%	\$60.00	\$15.00
	S-ORD101572	-	A Adatum Corporati	Jun 16, 2023	Allocated	+3	2	1	-681%	\$780.70	\$100.00
	S-ORD101573	-	A Adatum Corporati	Aug 10, 2023	Allocated	+3	2	1	-689%	\$780.70	\$99.00
	S-ORD101608	-	A Adatum Corporati	Jul 11, 2023	No Products	0	0	0	0%	\$0.00	\$0.00
	S-ORD101633	-	D DIMENSIONS TES	Jul 24, 2023		0	1	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 ControlCustomersDocumentsProducts+

Read-Only View (Document Pending Prepayment)

Customers > Adatum Corporation > Order

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

New Order

Payment TermsIM180  
Sell to AddressLEWES ROAD  
2 Lewes Road  
Atlanta GA, 30772, US

Shipment Agent  
Agent Service

Paid\$0.00  
Authorized\$0.00  
Prepaid\$0.00  
Balance\$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-ae66-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.