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Mission Control: Configuration

Cavallo Support - 2026-08-19 - [Mission Control Documentation](#)

Cavallo's workflow engine for Business Central allows users to take advantage of logic based routing and business rules in both Cavallo and in Business Central itself. Below, we'll cover how to set up and use this functionality in Business Central!

Note: Only users with "Cavallo All Access" permissions will have the ability to set the Cavallo API.

Order of Operations:

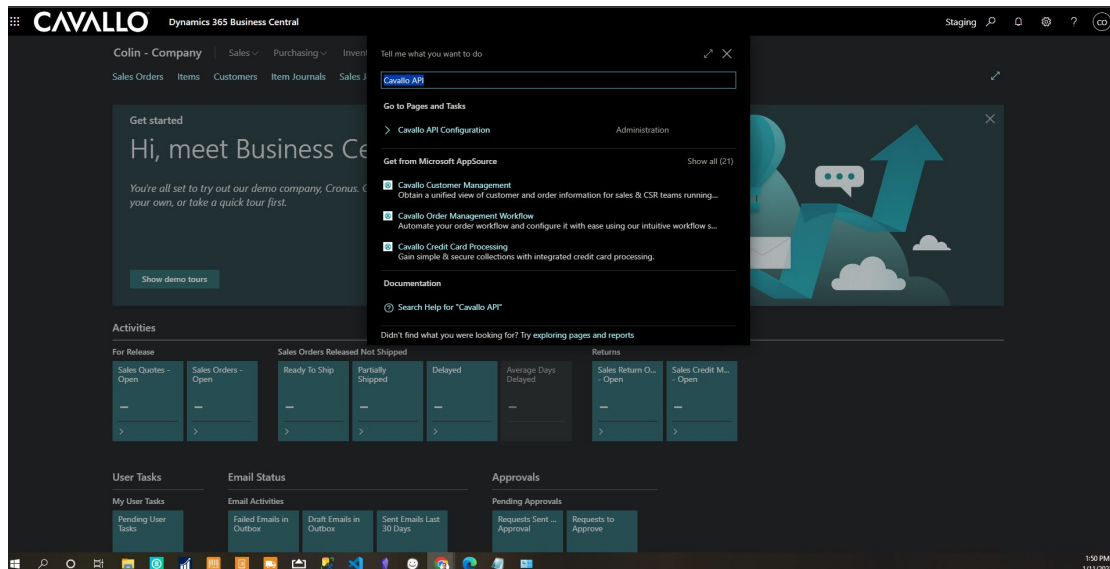
1. Install the latest extension of Cavallo found here: [Cavallo Extensions](#)
2. Establish the Service to Service connection. Instructions here: [Service to Service](#)
3. Assign an admin the "Cavallo All Access" permission set in Business Central: [Cavallo Permission Sets](#)
4. Build out a workflow in Cavallo and select publish.
5. Ensure the Cavallo API is configured correctly within Business Central: [Cavallo API](#)
6. Validate workflow submits and moves within Business Central.

Cavallo API

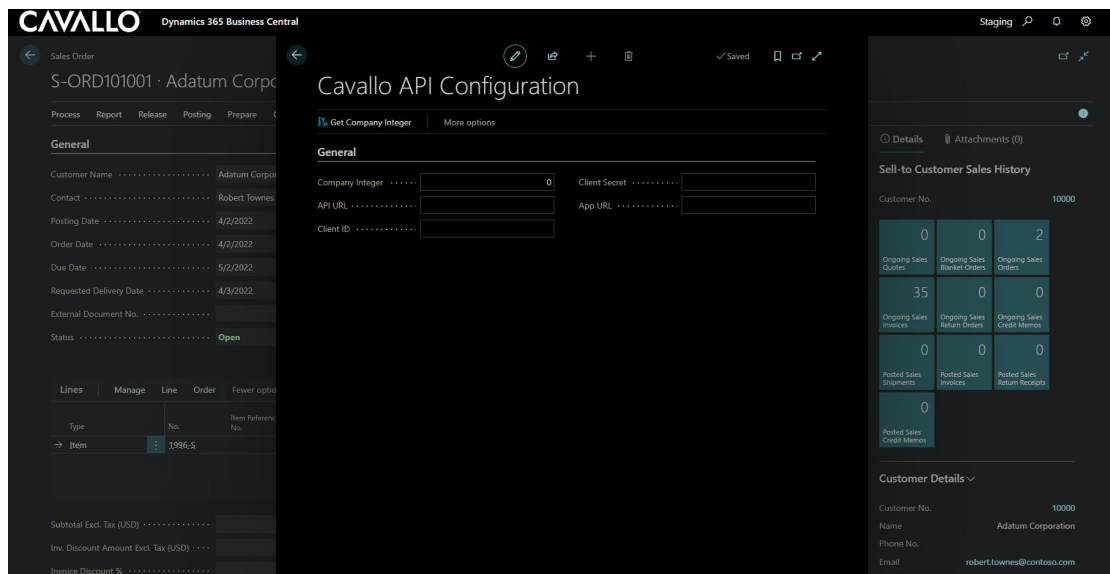
The first action that must be taken in order to use the Cavallo workflow in Business Central is that we need to set the Cavallo API setting within Business Central. In order to do this follow the below steps:

1. Navigate to the Cavallo Workflow Setup and click any of the workflows that exist.
2. Edit one of the workflow queues (This can be as simple as changing the name or description fields).
3. Press Save and Publish your changes.

Our API settings will be set in Business Central when the user selects "Publish Changes". In order to validate your API is set, you can navigate to Business Central and search "Cavallo API" and click the "Cavallo API Configuration" option as seen below:



From this screen you will be able to see that all the fields for the Cavallo API are set. (Example is unpopulated on purpose)

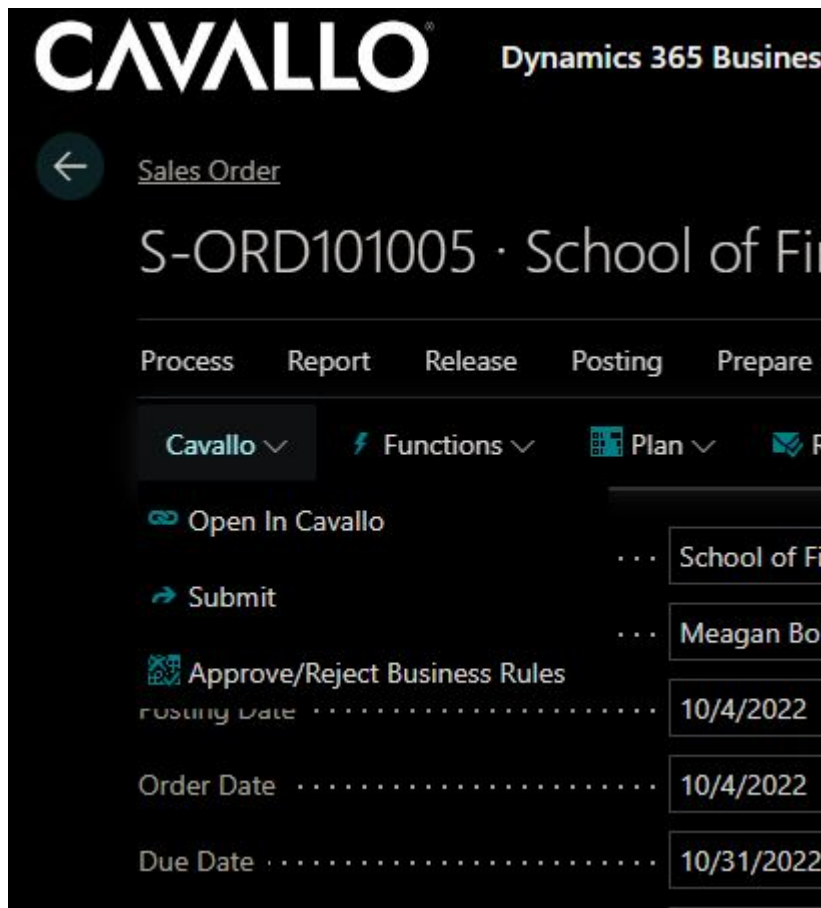


Once the Cavallo API is successfully set, the user will have the ability to execute their workflow and business rules, filter documents for broken rules and approve/reject those documents all within Business Central. Continue reading below to see examples of these features!

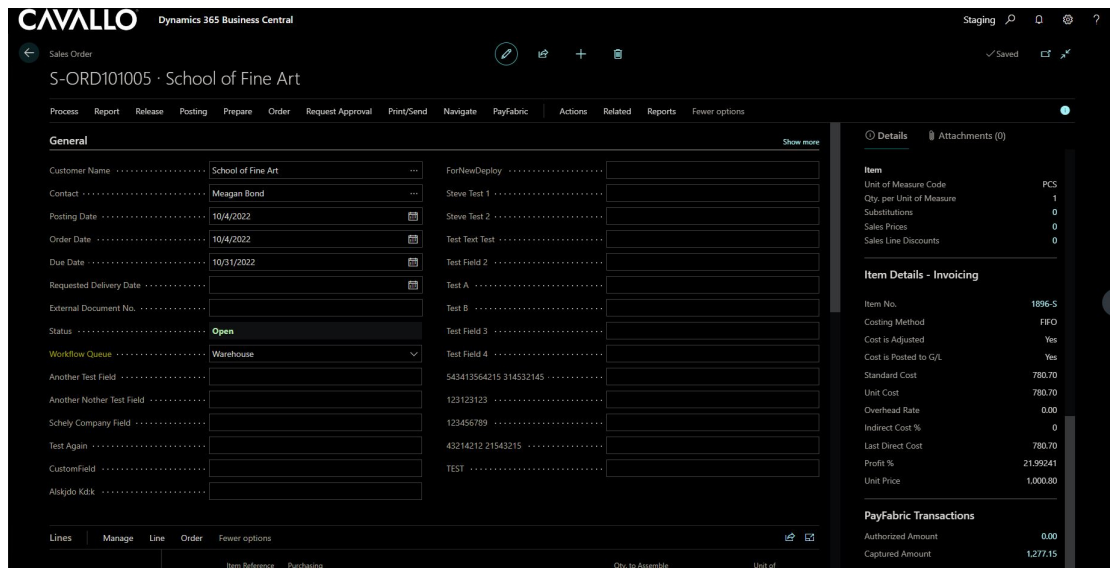
Submit Document To Workflow

For all of the actions within Business Central, We have created a menu on the main Business Central nav bar called "Cavallo". These options can be moved around and personalized in the same way that other Business Central fields are able to be. In order to find our menu, navigate to "Actions" in Business Central. See the below image:

***Note*:** Your menu may be in a different order than the below image but still under the actions dropdown.



The current queue a document is in Workflow can be viewed on the header of any sales document as seen below:



On any document, using the "Submit" button will run that document against the logic assigned in Cavallo.

Sales Order

S-ORD101005 · School of Fine Art

Process Report Release Posting Prepare Order Request Approval Print/Send Navigate PayFabric Actions Related Reports Fewer options

General

Customer No. 30000 Assigned User ID

Customer Name School of Fine Art Status Open

Sell-to Address 10 High Tower Green Work Description

Address 2 Miami

City Miami

State FL

ZIP Code 37125

Country/Region Code US

Contact No. CT000005 Test Again

Phone No. CustomField

Mobile Phone No. Alakjdo Kdkk

Email meagan.bond@contoso.com ForNewDeploy

Contact Meagan Bond Steve Test 1

No. of Archived Versions 0 Steve Test 2

Document Date 10/4/2022 Test Test Test

Posting Date 10/4/2022 Test Field 2

Order Date 10/4/2022 Test A

Details Attachments (0)

Item

Unit of Measure Code PCS

Qty. per Unit of Measure 1

Substitutions 0

Sales Prices 0

Sales Line Discounts 0

Item Details - Invoicing

Item No. 1896-S

Costing Method FIFO

Cost is Adjusted Yes

Cost is Posted to G/L Yes

Standard Cost 780.70

Unit Cost 780.70

Overhead Rate 0.00

Indirect Cost % 0

Last Direct Cost 780.70

Profit % 21.99241

Unit Price 1,000.00

PayFabric Transactions

Authorized Amount 0.00

Captured Amount 1,277.15

Document forwarded to Warehouse

OK

Cavallo Document Statuses

Cavallo has a number of custom statuses that have been built to ensure that documents are always on the correct workflow path. If users have the Cavallo API configured, the ability to view the Cavallo Document Status panel should be available on sales order search and the sales order cards.

CAVALLO Dynamics 365 Business Central

Sales Order

S-ORD101921 · Adatum Corporation

Process Posting Release Submit Prepare Print/Send Request Approval Order Create Warehouse Shipment Warehouse Pick Lines Warehouse Shipment Lines Report PayFabric Actions Related Reports

Address 2 Salesperson Code JO

City Atlanta Campaign No.

State GA Opportunity No.

ZIP Code 31772 Responsibility Center MIDWEST

Country/Region Code US Assigned User ID

Contact No. CT000001 Status Open

Phone No. Work Description

Mobile Phone No. Workflow Queue CC Check

Email Test ABC 0.00

Contact Quote Rejected

No. of Archived Versions 0 Test 0.00

Document Date 12/5/2023 Number on Doc 0.00

Posting Date 12/5/2023 High Value Cust

Order Date 12/5/2023 Disc on Hold Yes

Due Date 1/5/2024

Requested Delivery Date

Lines Manage Line Order Fewer options

Details Attachments (3)

Cavallo Document Statuses

Partially Backordered

Needs Payment

Partially Reserved

Sell-to Customer Sales History

Customer No. 10000

2	0	348
Ongoing Sales Quotes	Ongoing Sales Backl Orders	Ongoing Sales Orders
39	13	1
Ongoing Sales Invoices	Ongoing Sales Return Orders	Ongoing Sales Credit Memos
101	80	1
Posted Sales Statements	Posted Sales Invoices	Posted Sales Return Receipts
1	0	0
Posted Sales Credit Memos	GP Sales transactions	GP Receivables transactions

Customer Statistics

As documents are submitted to Cavallo's workflow engine, the statuses will dynamically update on transition to ensure users have the most accurate information possible. In addition, Cavallo will provide direct links to any related documents that are generated as a part of the workflow actions such as warehouse picks, warehouse shipments and purchase orders.

CAVALLO

Dynamics 365 Business Central

Sales Order

S-ORD101921 · Adatum Corporation

Process

Posting

Release

Submit

Prepare

Print/Send

Request Approval

Order

Create Warehouse Shipment

Warehouse Pick Lines

Warehouse Shipment Lines

Report

PayFabric

Actions

Related

Reports

Address 2

City

State

ZIP Code

Country/Region Code

Contact No.

Phone No.

Mobile Phone No.

Email

Contact

No. of Archived Versions

Document Date

Posting Date

Order Date

Due Date

Requested Delivery Date

Salesperson Code

Campaign No.

Opportunity No.

Responsibility Center

Assigned User ID

Status

Work Description

Workflow Queue

Test ABC

Quote Rejected

Test

Number on Doc

High Value Cust

Doc on Hold

Details

Attachments (3)

Cavallo Document Statuses

Partially Backordered

Needs Payment

Partially Reserved

Sell-to Customer Sales History

Customer No. 10000

2

0

348

Ongoing Sales Quotes

Ongoing Sales Blanket Orders

Ongoing Sales Orders

39

13

1

Ongoing Sales Returns

Ongoing Sales Return Orders

Ongoing Sales Credit Memos

101

80

1

Posted Sales Shipments

Posted Sales Invoices

Posted Sales Return Receipts

1

0

0

Posted Sales Credit Memos

GP Sales Transactions

GP Reversals Transactions

Customer Statistics

Cavallo Business Rules In Business Central

Several different tools are available in Business Central when it comes to utilizing Cavallo business rules.

Personalization Options

Cavallo pushes a number of columns over to Business Central for users to utilize. One of these columns is titled "Broken Business Rules" and can be applied to the sales line search grid in addition to the sales lines grid. When applied, this column will show the user how many broken business rules a particular sales line has attached to it. Clicking the number in this column will populate the approve/reject window for users to take action against any line with a broken rule.

CAVALLO

Dynamics 365 Business Central

Sales Order

S-ORD101921 · Adatum Corporation

Process

Posting

Release

Submit

Prepare

Print/Send

Request Approval

Order

Create Warehouse Shipment

Warehouse Pick Lines

Warehouse Shipment Lines

Report

PayFabric

Actions

Related

Reports

Email

Contact

No. of Archived Versions

Document Date

Posting Date

Order Date

Due Date

Requested Delivery Date

Workflow Queue

Test ABC

Quote Rejected

Test

Number on Doc

High Value Cust

Doc on Hold

Details

Attachments (3)

Cavallo Document Statuses

Needs Payment

Sell-to Customer Sales History

Customer No. 10000

2

0

348

Ongoing Sales Quotes

Ongoing Sales Blanket Orders

Ongoing Sales Orders

39

13

1

Ongoing Sales Returns

Ongoing Sales Return Orders

Ongoing Sales Credit Memos

101

80

1

Posted Sales Shipments

Posted Sales Invoices

Posted Sales Return Receipts

1

0

0

Posted Sales Credit Memos

GP Sales Transactions

GP Reversals Transactions

Customer Statistics

Lines

Manage

Line

Order

Fewer options

Type	No.	Description	Unit of Measure Code	Location Code	Bin Code	Cavallo Qty. Available	Quantity	Reserve	Reserved Quantity	Unit
Item	1826-S	ATHENS Desk	PCS	SOUTH		144.00	1	Never	—	
Item	1908-S	LONDON Swivel Chair, blue	PCS	SOUTH		0.00	1	Never	—	
Item	1906-S	ATHENS Mobile Pedestal	PCS	SOUTH		0.00	1	Optional	—	
Item	1900-S	PARIS Guest Chair, black	PCS	SOUTH		0.00	1	Always	—	

Subtotal Excl. Tax (USD)

1,446.90

Total Excl. Tax (USD)

1,446.90

Broken Business Rule

Business Rules are evaluated whenever a document is submitted through the workflow. In the case there is a broken rule, the user will presented with a pop up window showing them all the broken rules and allowing them to add a comment for the approver to view.

CAVALLO Dynamics 365 Business Central

Sales Order: S-ORD101005 · School of Fine Art

Process: Report Release Posting Prepare Order Request Approval

General

Customer Name: School of Fine Art
 Contact: Meagan Bond
 Posting Date: 10/4/2022
 Order Date: 10/4/2022
 Due Date: 10/31/2022
 Requested Delivery Date:
 External Document No.:
 Status: Open
 Workflow Queue: Ready To Invoice
 Another Test Field:
 Another Nother Test Field:
 Scherly Company Field:
 Test Again:
 CustomField:
 Altagdo Kdk:

Edit - Submit For Review - Wrong Sales Rep

Submit More options

Broken Rules

Name	Description	Status
Wrong Sales Rep	Wrong Sales Rep	Broken

More Details

Comment:

Close

Sell-to Customer Sales History

Customer No.: 30000

1	0	17
Ongoing Sales Quotes	Ongoing Sales Blanket Orders	Ongoing Sales Orders
61	0	0
Ongoing Sales Invoices	Ongoing Sales Return Orders	Ongoing Sales Credit Memos
22	21	0
Posted Sales Shipments	Posted Sales Invoices	Posted Sales Return Receipts
0		
Posted Sales Credit Memos		

Customer Details

Customer No.: 30000
 Name: School of Fine Art
 Phone No.:
 Email: meagan.bond@contoso.com

Once submitted, the "Workflow Queue" field in Business Central will update to reflect the broken rule and the document will be ready for approval or rejection.

Reviewing Business Rules

The approve or reject options are located in the Cavallo dropdown menu on the nav bar. A user can select an order from the document search, a line containing broken rules from sales line search or directly from the document itself in order to review for approval. Once the approve/reject option is selected, a pop up window will display the broken rules in addition to the lines that break each rule and allow a user to select the number of rules to approve. The approver may also add comments at this time and either approve or reject the rule(s).

CAVALLO Dynamics 365 Business Central

Sales Order: S-ORD101921 · Adata

Process: Posting Release Sub

Email:
 Contact:
 No. of Archived Versions:
 Document Date:
 Posting Date:
 Order Date:
 Due Date:
 Requested Delivery Date:

Edit - Approve/Reject Business Rules - Margin Review

Approve Reject

Broken Rules

Name	Description	Status	Rejected	Comments	Selected
Any line exceeding \$1000	Document Rule 1	review		0	
Margin Review	Any margin below 10%	review		0	

Lines Breaking Rule

Sales Lines

Line No.	Type	No.	Location Code	Description	Quantity	Unit Price Excl. Tax	Unit Cost (\$)	Amount
20000	Item	1908-S	SOUTH	LONDON Swivel Chair, blue	1	2.00	148.10	2.00
40000	Item	1900-S	SOUTH	PARIS Guest Chair, black	1	21.00	150.30	10.50

Close

Subtotal Excl. Tax (USD): 1,446.90 Total Excl. Tax (USD): 1,446.90

Customer Statistics

Customer Sales History

Customer No.: 10000

0	348
Ongoing Sales Blanket Orders	Ongoing Sales Orders
13	1
Ongoing Sales Invoices	Ongoing Sales Credit Memos
80	1
Posted Sales Shipments	Posted Sales Return Receipts
0	0
GP Sales Transactions	GP Receivables Transactions

On submit, the user will receive a confirmation of their selections and the document will be unlocked and moved the workflow to its destination queue. Keep in mind, these actions will respect any business rule notifications set in the Cavallo workflow engine as well.

Filtering For Broken Rules

There are 2 main filters in Business Central that can be utilized to show only documents or sales lines with business rules that require review. The first is a document level filter called "Broken Cavallo Business Rules" and has two main options. When the filter is set to yes, only documents with broken rules will be shown. When the filter is set to no, documents with broken rules will be omitted from the document search page. See the below image for the filter:

CAVALLO Dynamics 365 Business Central

Colin - Company

Sales Orders: Custom filtered

Views: All, Shipped Not Invoiced, Completely Shipped Not Invoiced, Sales Orders - Open, Ready To Ship, Partially Shipped, Delayed, All [Copy]

Filter list by: > Broken Cavallo Business Rules, Yes

Filter totals by: Date Filter: 11/11/23

No.	Self-to Customer No.	Self-to Customer Name	External Document No.	Location Code	Assigned User ID	Doc Date
S-ORD101114	10000	Adatum Corporation	MAIN			11/

Details: Customer Statistics

Customer No. 10000

Balance (\$) 28,899.65

Balance (LCY) As Vendor 0.00

Sales

Outstanding Orders (\$) 206,267.06

Shipped Not Invd. (\$) 3,182.55

Outstanding Invoices (\$) 256,198.47

Payments

Payments (\$) 200.28

Refunds (\$) 0.00

Last Payment Receipt Date 1/4/2023

Total (\$) 494,547.73

Credit Limit (\$) 10,000,000.00

Overdue Amounts (\$) 25,648.31

Total Sales (\$) 0.00

Invoiced Prepayment Amoun... 0.00

Customer Details

Customer No. 10000

Name Adatum Corporation

Next, there is a saved view on the sales line search grid titled "Has Broken Rules". Clicking this view will sort the entire grid to only view those sales lines with greater than 0 broken rules. Users can also take approve/reject action from this filtered view if the correct grid personalization has taken place and the "Broken Business Rules" column is visible.

CAVALLO Dynamics 365 Business Central

Sales Lines: Has Broken Rules

Views: All, Has Broken Rules

Filter list by: + Filter...

Filter totals by: Reset filters

Document Type	Document No.	Self-to Customer No.	Type	No.	Description	Location Code	Reserve	Broken Business Rules	Quantity	Reserved Qty. (Base)	Unit of Measure Code
Order	S-ORD101916	10000	Item	1896-S	ATHENS Desk	SOUTH	Never	1	1	0	PCS
Order	S-ORD101915	10000	Item	1896-S	ATHENS Desk	SOUTH	Never	1	1	0	PCS
Order	S-ORD101873	10000	Item	1896-S	ATHENS Desk	SOUTH	Optional	1	1	1	PCS
Order	S-ORD101870	10000	Item	1896-S	ATHENS Desk	SOUTH	Optional	1	1	1	PCS
Return Order	S-RETORD1014	10000	Item	1896-S	ATHENS Desk	SOUTH	Optional	0	1	-1	PCS
Return Order	S-RETORD1013	10000	Item	1896-S	ATHENS Desk	SOUTH	Optional	0	1	-1	PCS
Return Order	S-RETORD1012	10000	Item	1896-S	ATHENS Desk	SOUTH	Optional	0	1	0	PCS
Return Order	S-RETORD1009	10000	Item	1906-S	ATHENS Mobile Pedestal	MAIN	Optional	0	1	0	PCS
Return Order	S-RETORD1009	10000	Item	1900-S	PARIS Guest Chair, black	MAIN	Optional	0	1	-1	PCS
Return Order	S-RETORD1006	10000	Item	1896-S	ATHENS Desk	MAIN	Optional	0	1	-1	PCS
Return Order	S-RETORD1005	10000	Item	1896-S	ATHENS Desk	MAIN	Optional	0	1	-1	PCS
Return Order	S-RETORD1004	10000	Item	1896-S	ATHENS Desk	MAIN	Optional	0	1	0	PCS
Return Order	S-RETORD1003	10000	Item	1896-S	ATHENS Desk		Optional	0	1	0	PCS
Return Order	S-RETORD1001	10000	Item	1896-S	ATHENS Desk		Optional	0	1	0	PCS
Credit Memo	S-CR1001	10000	Item	1896-S	ATHENS Desk	SOUTH	Optional	0	1	0	PCS
Invoice	S-INV102221				Thank you for ordering		Never	0	0	0	
Invoice	S-INV102221	40000	Item	1965-W	Conference Bundle 2-8		Optional	0	2	0	PCS
Invoice	S-INV102220				Thank you for ordering		Never	0	0	0	
Invoice	S-INV102220	40000	Item	1965-W	Conference Bundle 2-8		Optional	0	20	0	PCS