Mission Control: Dashboards

Cavallo Support - 2026-09-24 - Mission Control Documentation

Overview

Mission Control adds dashboards where you can see and manage sales documents as they progress through workflow, plus review documents that break business rules and require approval, directly within Business Central. Sales reps, CSRs, and managers can stay in the system where they already work and still see where documents are moving, where they're stuck, and where they need to intervene or make decisions.

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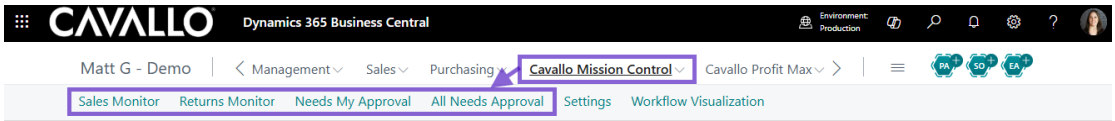
How to Find Dashboards

Mission Control dashboards are accessible for the following BC roles:

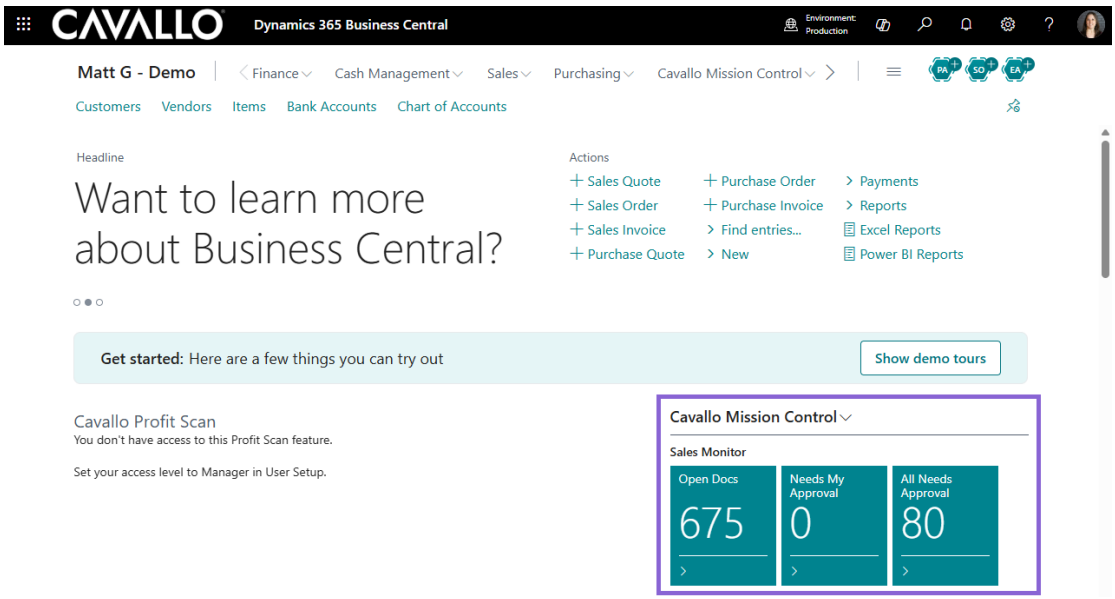
- President
- Accountant
- Business Manager
- Sales Manager
- Sales and Relationship Manager
- Sales Order Processor
- Purchasing Agent

For users who are assigned any of the above roles, two new capabilities become available in the BC homepage.

The Cavallo Mission Control navigation menu provides access to the Mission Control dashboards.



The Cavallo Mission Control homepage section displays new tiles for each of the dashboards with their current document count, based on the current queues and filters that are applied on the page for the current user.



Mission Control dashboards can also be accessed via the Business Central global search in the upper right, for example by searching for "Sales Monitor".

Available Dashboards

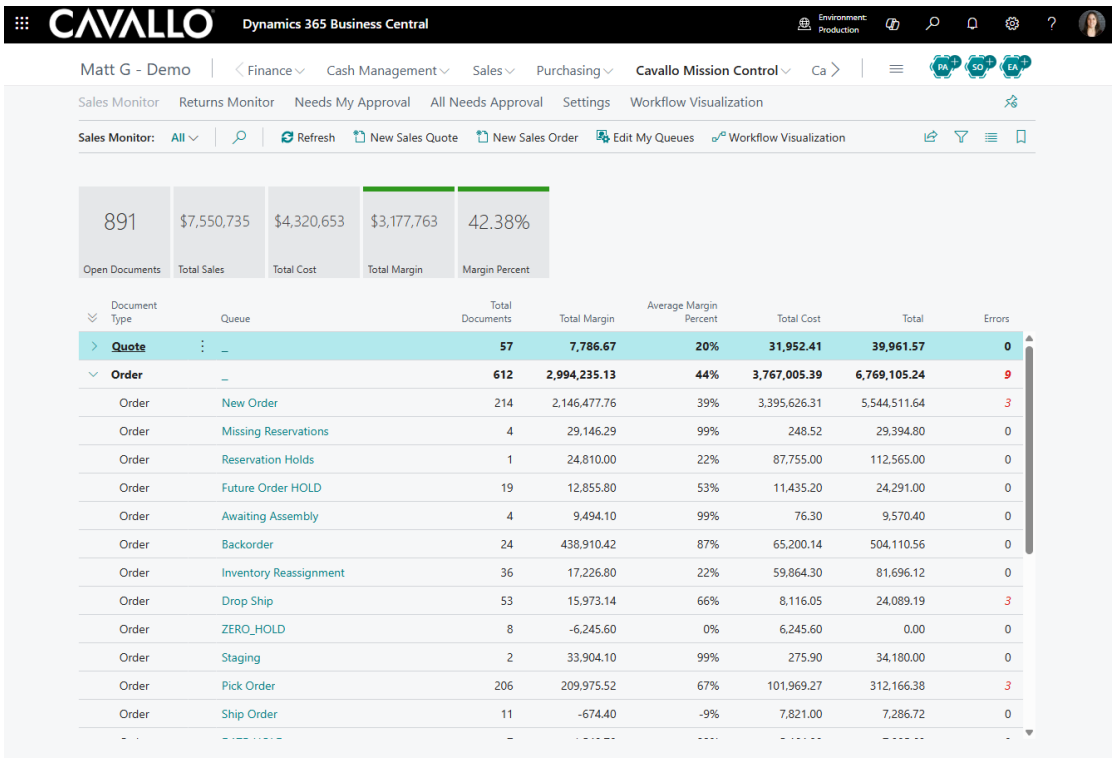
Mission Control within Business Central has four main dashboard views for managing sales documents based on their current status in the workflow. Each of these dashboards provides drilldown capabilities to select workflow queues and see their included documents, immediately launch any document or customer for review or action, or trigger certain actions on the document without needing to launch it.

Sales Monitor

The Sales Monitor dashboard provides broad visibility across all workflow queues for sales quotes, sales orders, and sales invoices in BC, including approval queues. This view includes summary information about each queue, such as the number of documents at that step, the total margin, cost, and price for all documents at that step, and the average margin percent across those documents.

Above the list of queues, the tiles highlight top-level information about the number of open documents across all queues that are currently shown in the view, their total margin, cost, and price, and the margin percent across those documents.

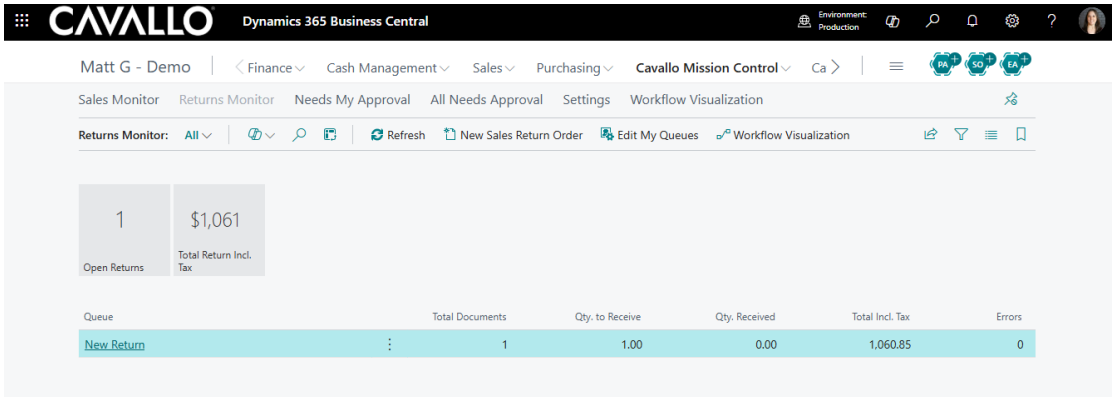
At the top of the dashboard, filtering lets you restrict the view to just quotes, orders, or invoices, incorporate field-based filters to focus your attention where it's needed, and "Edit My Queues" to choose exactly which steps you want to be visible. You can view a visualization of the workflow to better understand how these steps flow together, and you can even create a new quote or order directly from this screen.



Returns Monitor

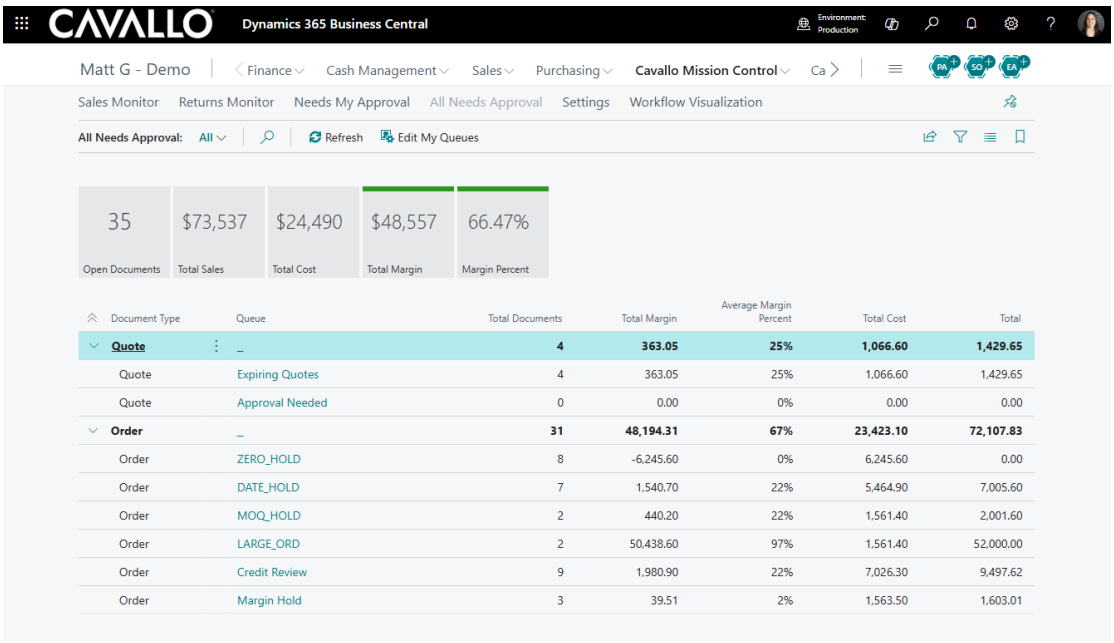
The Returns Monitor dashboard displays all workflow queues for sales returns with summary information about each queue such as the total number of documents, total quantity received and awaiting receipt, and the total cost. Above the list, the tiles display the total number of returns across all visible queues, and their total cost.

At the top of the dashboard, field-based filters can restrict the visible returns, and you can "Edit My Queues" to choose which steps are included in the view. You can view a visualization of the return workflow, and even create new returns directly from this dashboard.



All Needs Approval

The All Needs Approval dashboard displays all approval queues, which are the steps where documents will be routed when they break any business rules. This view offers the same visibility options as the Sales Monitor.



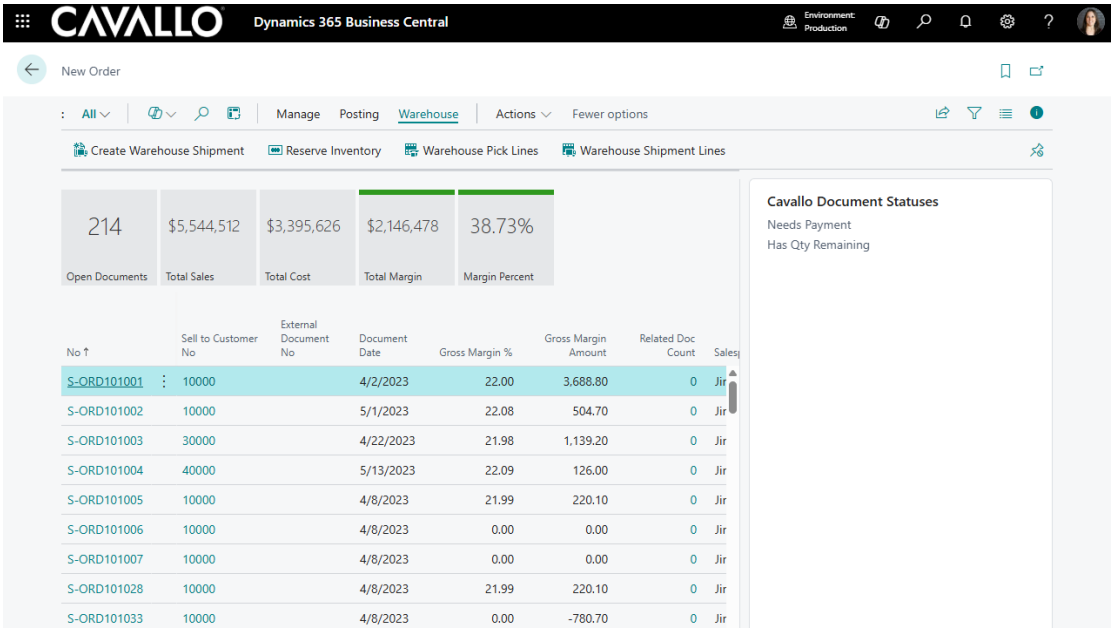
Needs My Approval

The Needs My Approval dashboard provides the same view as the All Needs Approval dashboard, but it only shows the approval queues for business rules that are assigned to the current user. This built-in targeted visibility makes this view an out-of-the-box nexus for manager approvals.

Document Actions

Selecting a queue from any dashboard drills into the documents in that queue, letting you launch those documents or customers directly, or take certain actions on documents without needing to launch it individually. Note that this view displays document totals in their local currencies.

These actions can be triggered for documents in all queues except approval queues. Different actions are available for different types of documents - for example, warehouse and posting actions are available for orders, but not for quotes.



There are a variety of actions available:

Manage

- **Refresh:** This action will refresh the KPI tiles and Grid for the current page.

- **New Sales Quote:** Initiates a new sales quote.
- **New Sales Order:** Initiates a new sales order.
- **Delete:** Attempts to delete the selected document.

Posting

- **Post:** Attempts to post the selected document.
- **Post Prepayment:** Attempts to create a prepayment invoice for the selected document.

Workflow

- **Submit to Workflow:** Submits the selected document to the Mission Control workflow.
- **Move Document:** Manually moves a document from queue to queue.

Warehouse

- **Create Warehouse Shipment:** Attempts to create a warehouse shipment for the selected document.
- **Reserve Inventory:** Attempts to reserve inventory to all sales lines. (Uses the auto reserve function in BC)
- **Warehouse Pick Lines:** Allows users to view all warehouse pick lines for the selected document.
- **Warehouse Shipment Lines:** Allows users to view all warehouse shipment lines for the selected document.

Actions

- **Copy Document:** Allows a user to use the standard BC copy function for the selected document.
- **Archive Document:** Attempts to archive the selected document
- **Print:** Allows a user to print the selected document.
- **Email Confirmation:** Allows a user to email a confirmation for the selected document.