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Mission Control: Purchasing via Workflow

Product Development - 2024-11-22 - Mission Control Documentation

With Mission Control's Workflow, users can choose between two different purchasing actions in the builder:

- Create Purchase Order (Used for Dropships and Special Order)
 - This action attempts to create purchase orders for sales lines with valid purchasing codes, vendors, and remaining quantities above 0.
- **Purchase and Reserve (***Used to fulfill qty remaining on sales lines***)**
 - This action attempts to create purchase orders for sales lines with a quantity remaining above 0 and automatically reserves inventory for the associated sales line.

The below document details examples explaining how to configure each of these options within Mission Control's workflow engine and how to utilize these actions while entering orders into Business Central.

Note: The Cavallo API must be configured correctly within Business Central before utilizing the above workflow actions. Documentation link: <u>Mission Control in BC</u> <u>Configuration</u>

Create Purchase Order

As mentioned above, this action is used hand in hand with purchasing codes in Business Central in addition to the requisition worksheet. If an item is configured with a primary vendor and a purchasing code is set to that line, the workflow engine will be able to generate a purchase order for that line. See the below setup for more information:

Prerequisites

• Ensure items have a vendor code assigned within Business Central

Item Card							
1896-	S·A	THEN	IS Des	sk			
Home	Reques	t Approval	ltem P	rices & Discounts	Actions \lor	Related \lor	Reports
Copy	ltem	着 Adjust	Inventory	Create Stock	keeping Unit	🖸 Apply Temp	late
Sales Price	s & Disc	ounts · · · ·		Create New			
Replenis Replenishn	nent Syst	t tem · · · · ·		Purchase			~
Lead Time	Calculat	ion · · · · ·					
Purchase							_
Vendor No				30000			\sim
Vendor Ite	m No. 🕔						
Purch. Unit	of Man			PCS			\sim
	or wea	sure · · · ·		105			

• Ensure the "Purchase Requisition Template" is set to REQ in Cavallo

Global		Sales Documents
Emails	\rightarrow	Default Quantity to Purchase on Purchase Orders
Payments	\rightarrow	The default selected here will be used for manual purchase order generation. You can choose a default for workflow in workflow configuration.
Sales Documents	→	Purchase Requisition Template REQ [DEFAULT]
Shipping and Invoicing	\rightarrow	Purchase Orders generated from sales orders will use the Requisition Template and Batch selected here. Only templates with batches configured in Business Central are shown.
User Groups (1)	\rightarrow	
Custom Fields	\rightarrow	
Updates	\rightarrow	

Workflow Configuration

This action can be located under either the on-entry or on-exit workflow actions menus in the Mission Control workflow builder.

Mission Control Workflows > Order Workflow Order Workflow Order Workflow Order don Dec 12,	2, 223		CO V Publish Changes
Needs Purchasing Pick Package	z New Order z New Order	→ ③ Pick Package	ď ·
Direct Ship Contract Review	T Needs Purchasing. Any order that loof thay reserved		Edit Name
Siemens Create Invoice	Should any Action(s) be triggered when entering this queue?		● Busi
Manual Review Add New Queue	Trigger these actions:		tess Rules (
			Automatic Action
G	Take 2 Set or a Credit Cred What Processer Purchase Order Pock Package Does It have any Alternate Path(s)?		۵۵ ۱

Once located, the action can be configured to trigger an email out to the vendor automatically if desired.

2	Needs Purchasing Any order that lish fully reserved	Edit Name	^
#	Should any Action(s) be triggered when entering this queue?		
	Trigger these actions:		
	Create Purchase Order V	↑ ↓ 0	
	What quantities of the order should be purchased? Remaining to Ship		
	Should the purchase order be emailed?		
	Add more+		
	What is its Primary Path?		
	3 Pick Package ∨		
	Does it have any Alternate Path(s)?		

After the action is fully setup, remember to save and publish the workflow before running any testing:

nouro dity Ac	cuonta) de unglered milen entening una queder.	•
Trigger these	e actions:	
Create	Purchase Order \checkmark	1 U D
What	t quantities of the order should be purchased?	
Remaini	ling to Ship \checkmark	
🕖 Shou	uld the purchase order be emailed?	•
Purchase	e - Order VIS Purchase Order - Blue V	
Reply to	Created By x	~
Send to	Vendor x	~
CC to	Select address, job title or internal user	~

Business Central Order Entry

To test the Create Purchase Order action, navigate to Business Central and initiate a new sales order.

Lines Q	D v Mana	ige Line (Order							6 2
[™] New Line	🕅 Delete I	ine 🏼 🗃 Sele	ct items	 Suggest sales lines 						si
Туре		Variant Code	No.	Description	Location Code	Purchasing Code	Quantity	Qty. to Assemble to Order	PO Number	Reserved Quantity
\rightarrow ltem	1		<u>1996-S</u>	ATLANTA Whiteboard, base	SOUTH	DROP. SHIP	25	-	_	_
				_						

Notice in the above image, a purchasing code of "DROP SHIP" is selected and my item has a vendor preset on its item card for replenishment. Next, use the "submit" button to send this order to Mission Control's workflow engine. The workflow will evaluate the sales order against all conditions and run any actions in the process.

S-ORD101058 · Siemens					
Home - Submit Prepare Print/Send R	equest Approval Order Report PayFabric	${\sf Actions} \lor {\sf Related} \lor {\sf Reports} \lor {\sf Autom}$	ate \lor Fewer options		0
Ransaction History Ruthorize 🐼 Cle	ear Reference No. 🛛 🕜 Process EMV Transaction	🕍 Post 🗸 — 🔂 Release 🗸 — 🎇 Create Wareho	use Shipment 🛛 😫 Create Inventory Put-away/Pick	Archive Document	帰
mail			*	Details Attachments (0)	
Contact · · · · · · Colin Or	fando	Workflow Queue	rder 🗸 🗸	Cavallo Document Statuses	Â
No. of Archived Versions	0	Test ABC	0.00	Needs Payment	- 1
Document Date 4/1/202	4	Quote Rejected		has Qiy Nemaning	- 1
Posting Date 4/1/2024	4	Quote Approval		Cavallo Business Rules	- 1
Order Date	4	Number on Doc	0.00		- 1
Due Date	4	High Value Cust		Sell-to Customer Sales History	
Requested Delivery Date		Doc on Hold Yes		Customer No. SIEMO	001
				0 0 41	
Lines 🖉 v Manage Line Order			e 🖬	Ongoing Sales Ongoing Sales Ongoing Sales	
∋ ⁸ New Line → Delete Line 🛛 Ə Select item	s * Suggest sales lines		*	Quotes Blanket Orders Orders	
Type Variant Code No.	Description Loc	Purchasing Qty. to tion Code Code Quantity	Assemble to Order PO Number Reserved Quantity	Ongoing Sales Ongoing Sales Ongoing Sales	
→ Item : 1996	5-S ATLANTA Whiteboard, base SO	JTH DROP.SHIP 25		4 3 0	

Once the workflow action has ran, Cavallo will link the purchase order and sales line. This can be seen in several areas between the purchase order and sales order.

• Sales Line Column (PO Number)

Lines 🕼 🗸 Man	age Line Orde	er							6 2
≩ [™] New Line → Delete	Line 🛛 🔡 Select it	tems	 Suggest sales lines 						×
Туре	Variant Code N	lo.	Description	Location Code	Purchasing Code	Quantity	Qty. to Assemble to Order	PO Number	Reserved Quantity
→ Item :	1	1996-S	ATLANTA Whiteboard, base	SOUTH	DROP SHIP	25	-	106039	-
4									•

Clicking the PO Number will bring the user directly to the purchase order in Business Central.

• Purchase Line Column (SO Number)

Purch	nase Order							Ø	È	-
100	5039 · Gra	phi	c Desig	n Institu [.]	te					
Ho	<u>me</u> Prepare Pri	int/Ser	nd Request A	pproval Orde	er More options					
đ	Post 🗸 🗋 Rele	ease	🗸 🎁 Create	Whse. Receipt	🔓 Create Inventory Put-away,	Pick	儲 Send I	ntercompan	y Purcha	ase Or
Docu	ment Date		5/1	7/2024			Status -			
Lir	nes Manage	Line	Functions	Order						
			ne 🎒 Select							
₽%	New Line 🗰 Del	lete Li	ile ar beleu	items						
<u>予</u> 從	New Line #X Del	lete Li	No.	Items Item Reference No.	Description	Locat	ion Code	SO Number	Var	iant Co

Clicking the SO number will bring the user directly to the sales order in Business Central.

• Cavallo Document Status Factbox

	Attachments (0)
Cavallo Docum	ent Statuses
Open PO	View
Needs Payment	
Cavallo Busines	s Pules
Cavallo Busines	s Rules
Cavallo Busines	s Rules er Sales History

Clicking the "View" button will open a window to see the list of open purchase orders for that sales document

\leftarrow	Related Docume	nts						$\forall \equiv 2$
	No. 1		Type↑ ▼	Created On	Total	Doc Date	Posting Date	Status
	<u>106039</u>	:	Dropship Purchase Order	5/17/2024 1:52 PM	28,882.35	5/17/2024	5/17/2024	Open

Purchase and Reserve

In Business Central, reservations are utilized as a way to allocate inventory to many different order types while allowing inventory numbers to remain accurate. With Mission Control's workflow engine, users can automate the reservation process and generate a purchase order for any quantity that couldn't be reserved due to inventory shortages.

Prerequisites

• Utilizing reservations as primary method of inventory promising in Business Central

Workflow Configuration

Workflow can be setup in a number of ways for this action. The first portion of this section will focus on configuring the basic "Purchase and Reserve" workflow action, while the second portion will focus on using this action in conjunction with the "Has qty remaining" document status to ensure all sales line are purchased and fulfilled.

Purchase and Reserve

This action can be located under either the on-entry or on-exit workflow actions menus in the Mission Control workflow builder.



Once located, the action can be configured to trigger an email out to the vendor automatically if desired.

ould any A	ction(s) be triggered when entering this queue?	
Trigger these	e actions:	
Create	Purchase Order And Reserve V	↑ ↓ ■
P phou	uid the purchase order be emailed?	
Purchase	se - Order V US Purchase Order - Blue V	
Reply to	Created By ×	~
Send to	Vendor ×	~
CC to	Select address, job title or internal user	~

After the action is fully setup, remember to save and publish the workflow before running any testing.

hould any Action(s) be triggered whe	n entering this queue?	
Trigger these actions:		
Create Purchase Order	\checkmark	↑ ↓ 0
What quantities of the order should	be purchased?	
Remaining to Ship \sim		
Should the purchase order be emailed	d?	•
Purchase - Order	✓ US Purchase Order - Blue ✓	
Reply to Created By ×		~
Send to Vendor ×	N-	~
CC to Select address, job title or in	ternal user	~

Once the workflow is published, the action will be active. This action utilizes Business Centrals purchasing logic to generate a purchase order for the quantity Business Central deems as demand and reserves that quantity back to the sales order.

Workflow Order Fulfillment

By integrating Mission Control's Document Statuses and Automatic Actions with the Purchase and Reserve function, you can streamline your order management. Sales lines with items in stock are directed to the warehouse, while backordered items automatically trigger purchase orders and reserve inventory for those backordered sales lines.

Configuration Steps

• Once a sales order reaches the stage in the business process where the warehouse documents should be generated, the following actions can be configured.

Should any Action(s) be triggered when entering this que
Trigger these actions:
Reserve Inventory for all Items 🗸
Create pick document v What quantities of the order should be picked?
Reserved

Note: Other actions may be configured as well, but ensure inventory is reserved prior to creating the pick document

• Next, in the same queue, configure an alternate path that will route back to a fulfillment queue. In the below example, if any of my sales lines have qty remaining after the reserve and pick process, the order is sent back up to "Needs Purchasing".

Does it have any Alternate Path(s)?

 Needs Purchasing (Path) 				🛍 Delete path 🛧 🗸
Add a name or description (Option	nal):			
Needs Purchasing				
If all of these conditions are true:				
A field from the order \sim	Document Status	Has any of	~	
These statuses 🗸 🗸	Has Qty Remaining X	~		W
Add Condition +				
Move to:				
2 Needs Purchasing	~			

• Finally, on-entry to the "Needs Purchasing" queue, the Purchase and Reserve action is set to trigger and email the newly generated Purchase Orders out to their respective vendors set on the item card.

nould any Ac	ction(s) be triggered when entering this queue?	
Trigger these	e actions:	
Create	Purchase Order And Reserve \sim	 ↑ ↓ 1
🕖 Shou	uld the purchase order be emailed?	•
Purchase	e - Order VUS Purchase Order - Blue V	
Reply to	Created By ×	~
Send to	Vendor ×	~
CC to	Select address, job title or internal user	~
	Select address inh title or internal user	~

Automatic Order Fulfillment

In the above workflow configuration, each action is automatically ran when a user clicks the "submit" button to send a document to the Mission Control workflow. To make this process fully automated, simply apply Automatic Actions at each step of the workflow process looking for the desired document statuses.

← New Automatic Action

What's the name of this automatic action?
Purchase Order Required
How would you describe this automatic action?
Purchase Order Required

L. Documents will be submitted to the next queue when the automatic action executes.

A field from the o	rder 🗸	Document Status	~	Has all of	~	_
These statuses	~ H	las Qty Remaining	× ~			Ľ
Add condition -						
/hich queues sho	uld this auton	natic action ap	ply to?			

Note: This action looks for documents with the Has Qty Remaining status and submits them to workflow, moving them to the fulfillment queue and running all on entry actions for PO creation.

Fully Received

Setup Action Log	
What's the name of this automatic action?	
Fully Received	
How would you describe this automatic action?	
Fully Received	

	A field from the order $$	Document Stat	us 🗸	Has all of	~	
	These statuses V	Fully Received	× ~			Û
	Add Condition +					
14/8	hich quares should this a	utomatic action a	upply to?			

Note: This action looks for documents with the Full Received status and submits them to workflow, moving them back to the warehouse. This process generates new Warehouse Picks for the remaining sales lines if the correct actions are configured.

Business Central Order Entry

To test the Purchase and Reserve action, navigate to Business Central and initiate a new sales order and add sales lines.

2.00 N I	Delete	Line 🏭 Col		Current color lines				
- New Line	J Delete	Line or Ser	ect items	· Suggest sales lilles				
Туре		Variant Code	No.	Description	Location Code	Quantity	Reserved Quantity	Qty Remaining
ltem			1896-S	ATHENS Desk	SOUTH	3	_	3.00
ltem			1906-S	ATHENS Mobile Pedestal	SOUTH	20	_	20.00
> Item	:		1980-S	MOSCOW Swivel Chair, red	SOUTH	150		150.00

In the above example, I have added a sales line with an item in stock and an item out of stock. Notice the Qty Remaining column will be automatically set to the full quantity as sales lines are added. The below image illustrates this, showing the "Has Qty Remaining" status is present on the order.

Cavallo Document Statuses

Needs Payment Has Qty Remaining

On the first submit to Mission Control's workflow, the automations will attempt to reserve all possible inventory to the sales lines and generate a warehouse pick for any inventory reserved. This action will also generate an open warehouse shipment as a byproduct of pick creation.

Margin Variance	·····	Clear Neier	-225.97 Fol	lowing Document	·····		stenouse shipme	anc igrorea	Details Attachmonts	(0)
ative Margin Vari	Manage line (Droier	-335.94					ið P	Cavallo Document Statuses Needs Payment Has Qty Remaining	:
₩U *	manage cine e	51001							Cavallo Business Rules	
New Line 🏓	CDelete Line 🔡 S	Select items	 Suggest sales lines 					>0		
vew Line 🕈	Variant Code	No.	 Suggest sales lines Description 	Location Code	Quantity	Reserved Quantity	Qty Remaining	Vnit of Measure	Profit Scan	
lew Line 🗭 pe em	C Delete Line 🛛 S Variant Code	No.	Suggest sales lines Description ATHENS Desk	Location Code	Quantity 3	Reserved Quantity	Qty Remaining 3.00	Unit of Measure PCS	Profit Scan	
lew Line 🏓 pe em em	Variant Code	No. 1896-S 1906-S	Suggest sales lines Description ATHENS Desk ATHENS Mobile Pedestal	Location Code SOUTH SOUTH	Quantity 3 20	Reserved Quantity	Qty Remaining 3.00 20.00	Vnit of Measure PCS PCS	Profit Scan Margin Status	lissing Targe
ew Line 🏵 pe em em	Variant Code	No. 1896-S 1906-S 1980-S	Suggest sales lines Description ATHENS Desk ATHENS Mobile Pedestal MOSCOW Swivel Chair, red	Location Code SOUTH SOUTH SOUTH	Quantity 3 20 150	Reserved Quantity - -	Qty Remaining 3.00 20.00 150.00	Vnit of Measure PCS PCS PCS	Profit Scan Margin Status <i>Munes M</i>	lissing Targe lissing Targe
ew Line 🎐 ee em em	Variant Code	No. 1896-S 1906-S 1980-S	Suggest sales lines Description ATHENS Desk ATHENS Mobile Pedestal MOSCOW Swivel Chair, red	Location Code SOUTH SOUTH SOUTH	Quantity 3 20 150	Reserved Quantity _ _ _	Qty Remaining 3.00 20.00 150.00	Vnit of Measure PCS PCS PCS	Profit Scan Margin Status <i>Margin Amounts</i>	lissing Targe lissing Targe
lew Line pe em em em	Variant Code	No. 1896-S 1906-S 1980-S	Suggest sales lines Description ATHENS Desk ATHENS Mobile Pedestal MOSCOW Swivel Chair, red	Location Code SOUTH SOUTH SOUTH	Quantity 3 20 150	Reserved Quantity _ _ _	Qty Remaining 3.00 20.00 150.00	Vinit of Measure PCS PCS PCS	Profit Scan Margin Status <i>Kulters M</i> Margin Amounts Calculated Margin Amount	lissing Targe lissing Targe 8,868.30
vew Line pe em em em	Variant Code	No. 1896-S 1906-S 1980-S	Suggest sales lines Description ATHENS Desk ATHENS Mobile Pedestal MOSCOW Swivel Chair, red	Location Code SOUTH SOUTH SOUTH	Quantity 3 20 150	Reserved Quantity _ _ _	Qty Remaining 3.00 20.00 150.00	PCS PCS	Profit Scan Margin Status M Lines M Margin Amount Calculated Margin Amount Target Margin Amount	lissing Target lissing Target 8,868.30 9,094.27

Images of the results are also below. This document is partially reserved and still has QTY remaining meaning on submit, workflow will attempt to purchase and reserve the remaining

i Details I Attachments (0)		
Cavallo Document Statuses		Í
Open Pick	View	1
Open Shipment	View	
Needs Payment		1
Partially Authorized		
Partially Reserved		
Has Qty Remaining		

sales lines.

Additionally, on the sales lines there is still 150 Qty Remaining for part# 1980-S that requires fulfillment.

ines 🕢 v Manage Line Order										
🏽 New Line 🛛 🔆 De	lete	Line 🏼 🗃 Seleo	ct items	Suggest sales lines						
Туре		Variant Code	No.	Description	Location Code	Quantity	Reserved Quantity	Qty Remaining		
ltem			1896-S	ATHENS Desk	SOUTH	3	3	0.00		
Item			1906-S	ATHENS Mobile Pedestal	SOUTH	20	20	0.00		
Item	÷		1980-S	MOSCOW Swivel Chair, red	SOUTH	150	_	150.00		
	es 🗘 > Ma X New Line 🔆 De Type Item Item Item	es 🛛 🗘 ~ Manage ^{AX} New Line 🕞 X Delete Type Item	es 20 × Manage Line Orde New Line R Delete Line 20 Select Type Variant Code Item 10 Item 20 Item	Image Manage Line Order Manage Line Order Select items Manage Manage Line Order Manage Variant Code Manage No. Item Image 1906-S 1980-S Item Image 1980-S 1980-S	es 20 × Manage Line Order New Line X Delete Line 20 Select items Suggest sales lines Type Variant Code No. Description Item 1 1896-S ATHENS Desk Item 1 1906-S ATHENS Mobile Pedestal Item 2 1980-S MOSCOW Swivel Chair, red	es 20 Manage Line Order New Line X Delete Line 20 Select items Suggest sales lines Type Variant Code No. Description Location Code Item 1896-S ATHENS Desk SOUTH Item 1906-S ATHENS Mobile Pedestal SOUTH Item 2 1980-S MOSCOW Swivel Chair, red SOUTH	Image Image Image Order Image Image Image Image Image Image Image Image Image	Image Image Image Image Image Image Image Image Image Image		

Forwarding the document through workflow again will attempt to purchase and reserve the 150 qty.

et Margin Variance ····· (2) Edition (1) Concurrent ···· (2) Edition (1) Cavallo Document ···· (2) Edition (1) Cavallo Document Statuses Open Pick Open Shipment Neder Degree Fick Open Shipment Neder Deg	e	er ct items 🍫 S	-225.97 Foll -335.94 Suggest sales lines	llowing Document				¢ 🖬	Details Details Details Attachments (0) Cavallo Document Statuses Open Pick Open Shipment Nedes Payment Fully Authorized	Viev
ygative Margin Variance → 335.94 hes @ ✓ Manage Line Order Bigensteines + Suggest sales lines + Suggest sales + Suggest	e	er ct items 💠 S	-335.94 Suggest sales lines					68	Cavallo Document Statuses Open Pick Open Shipment Needs Payment Fully Authorized	Viev Viev
* New Line → Suggest sales lines ✓ Type Variant Code No. Description Location Code Quantity Reserved Quantity Cdy Remaining Item 1996-5 ATHENS Desk SOUTH 3 3 0.00 PCS Item 1906-5 ATHENS Mobile Pedestal SOUTH 20 200 0.00 PCS	slete Line 🎒 Selec	ct items 🔩 S	Suggest sales lines						Fully Authorized	
Type Variant Code No. Decorption Location Code Quantity Reserved Quantity City Remaining Messare Item 1 1896-5 ATHENS Desk SOUTH 3 0.00 PCS Cavallo Business Rules Item 1 906-5 ATHENS Mobile Pederal SOUTH 20 0.00 PCS Cavallo Business Rules								Vnit of	Partially Reserved Has Qty Remaining	
Item 1906-S ATHENS Mobile Pedestal SOUTH 20 20 0.00 PCS	variant code	1896-5	ATHENS Desk	SOUTH	Quantity P	reserved Quantity	0.00	PCS	Cavallo Business Rules	
		1906-5	ATHENS Mobile Pedestal	SOUTH	20	20	0.00	PCS		
Item : 1980-S MOSCOW Swivel Chair, red SOUTH 150 _ 150.00 PCS Profit Scan	:	1980-S	MOSCOW Swivel Chair, red	SOUTH	150	-	150.00	PCS	Profit Scan	
Margin Status Mitis									Margin Status Missing Lines Missing	Targe Targe

As seen in the below statuses, the document now has an Open PO that is directly linked to the sales order in question. The document has also transitioned to a fully reserved status.

Cavallo Document Statuse	s
Open PO	View
Open Pick	View
Open Shipment	View
Needs Payment	
ully Authorized	

On the sales line view, all the inventory is accounted for and reserved.

3	🏽 New Line 🛛 🔆 D	elete	Line 🔡 Sele	ect items	Suggest sales lines					埝
	Туре		Variant Code	No.	Description	Location Code	Quantity	Reserved Quantity	Qty Remaining	Unit of Measure
	Item			1896-S	ATHENS Desk	SOUTH	3	3	0.00	PCS
	Item			1906-S	ATHENS Mobile Pedestal	SOUTH	20	20	0.00	PCS
\rightarrow	Item	÷		1980-S	MOSCOW Swivel Chair, red	SOUTH	150	150	0.00	PCS

Lastly, once the purchase order is received, the document status will update to either Partially or Fully Received. This will allow any automatic actions that are configured to move the sales document along its process automatically, or a workflow submit can retrigger a new group of warehouse picks for the newly aquired inventory.

Ca	avallo Do	ocument St	atuses					
Fu	Ily Receive	d						
Op	oen Pick			View				
Op	oen Shipme	ent		View				
Ne	eds Payme	ent						
Fu	Ily Authoriz	zed						
Re	served							
\leftarrow	Related Documents					7 🗏 🗸		
÷	Related Documents	Type 1 🔻	Created On	Total Doc Date	Posting Date	∑ ∠ Status		
~	Related Documents No. 1 P-00068	Type 1 T Warehouse Pick	Created On 5/21/2024 3:24 PM	Total Doc Date	Posting Date	Status Open		
~	No. 1 P-00068 P-00069	Type 1 T Warehouse Pick Warehouse Pick	Created On 5/21/2024 3:24 PM 5/21/2024 3:35 PM	Total Doc Date 0.00 0.00	Posting Date	∑ ≣ ∠ ² Status Open Open		
÷	No. 1 P-00068 P-00069	Type 1 T Warehouse Pick Warehouse Pick	Created On 5/21/2024 3:24 PM 5/21/2024 3:35 PM	Total Doc Date 0.00 0.00	Posting Date	∑ ≣ ∠* Status Open		
<	No. 1 P-00068 P-00069	Type 1 T Warehouse Pick Warehouse Pick	Created On 5/21/2024 3:24 PM 5/21/2024 3:35 PM	Total Doc Date 0.00 0.00	Posting Date	∑ ≣ ∠ Status Open		
<	Related Documents No. 1 P-00068 P-00069	Type 1 T Warehouse Pick Warehouse Pick	Created On 5/21/2024 3:24 PM 5/21/2024 3:35 PM	Total Doc Date 0.00 0.00	Posting Date	∑ ≣ ∠ Status Open		

As inventory arrives, the workflow automations allow warehouse documents to generate to continue the fulfillment process while ensuring the main sales document is in the correct workflow stage.

FAQs

1. Where is the submit button located?

 If a submit button is not visible on screen, check under the actions menu for a "Cavallo" option. If the button is not under this menu, the Cavallo API may not be configured correctly. Please reach out to Support@Cavallo.com for assistance.

2. Where can I find the PO Number and SO Number Fields?

• By default, the PO number field can be found in the sales line personalization menu on sales order and the SO number field can be located in the purchase line personalization menu for Purchase Orders. This is a field pushed to Business Central via Cavallo.

3. Where is the Qty Remaining field?

- By default, the Qty Remaining number field can be found in the sales line personalization menu on sales orders. This is a field pushed to Business Central via Cavallo.
- 4. How is Qty Remaining calculated?

- Qty Remaining is calculated using base Business Central fields:
 - \circ Qty Remaining = Outstanding Qty Reserved Qty