Mission Control: Purchasing via Workflow

Product Development - 2026-10-26 - Mission Control Documentation

Mission Control provides two different workflow actions to automate purchase order generation in sales order workflow:

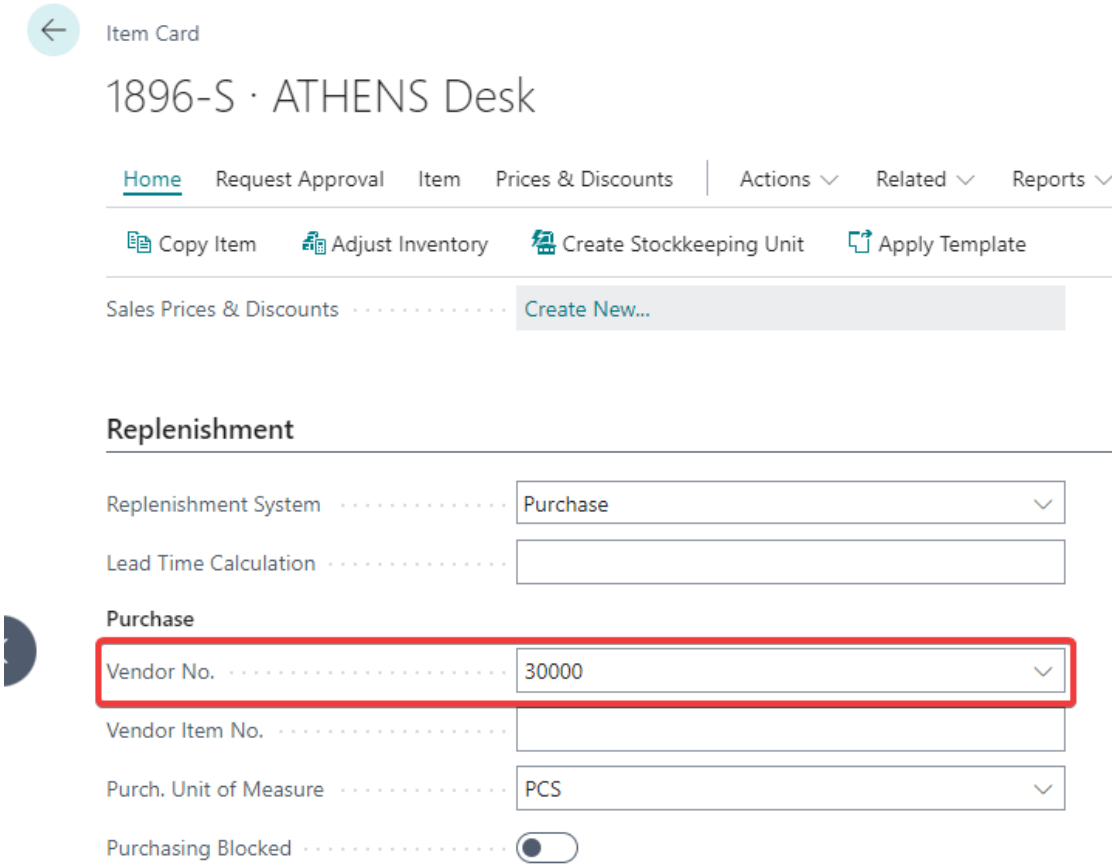
- **Create Purchase Order** *(Often used for drop ships and special orders)*
  - This action creates POs for all sales lines that have valid purchasing codes, vendors, and remaining quantities above 0
- **Create Purchase Order and Reserve** *(Often used for backorder POs)*
  - This action creates POs for all sales lines that have valid purchasing codes, vendors, and remaining quantities above 0, and it also automatically reserves those purchased quantities for each sales line

This article explains how to configure and use these options within Mission Control and Business Central. This assumes that you have already set up Mission Control.

Prerequisites

Mission Control can generate POs for any items that have a primary vendor set in Business Central and a purchasing code assigned to the sales line.

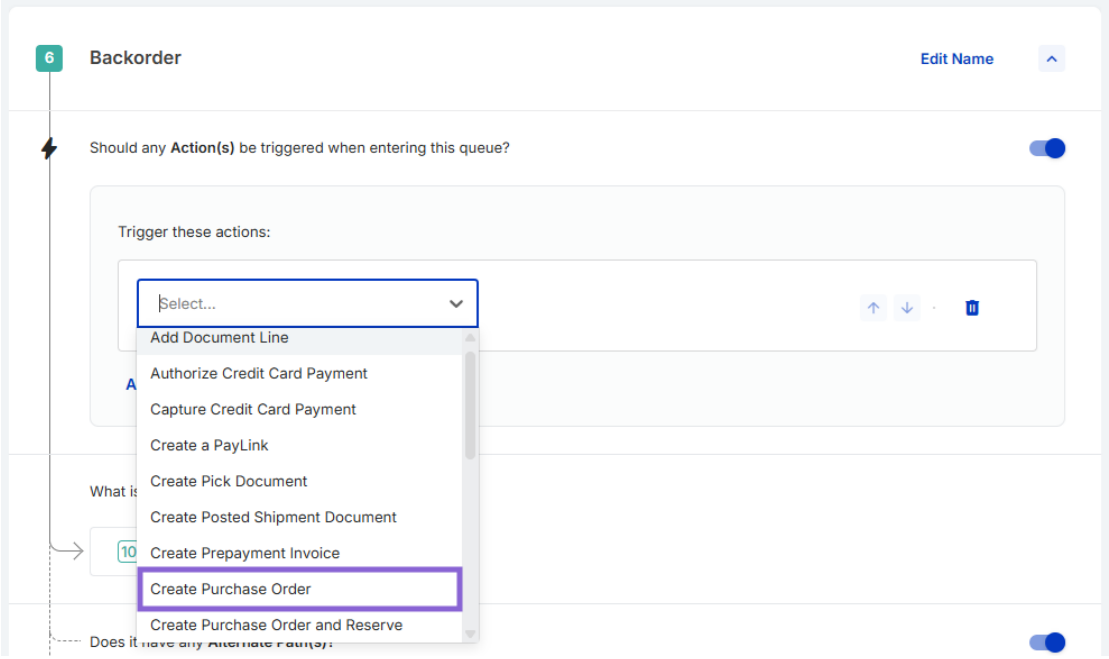
- In Mission Control, launch the menu dropdown at the top right and select Settings
  - On the Settings screen, select the Sales Documents setting category, set the Purchase Requisition Template to REQ
- In BC, ensure each applicable item has a vendor code assigned in its item card under Replenishment > Purchase > Vendor No



Create Purchase Order

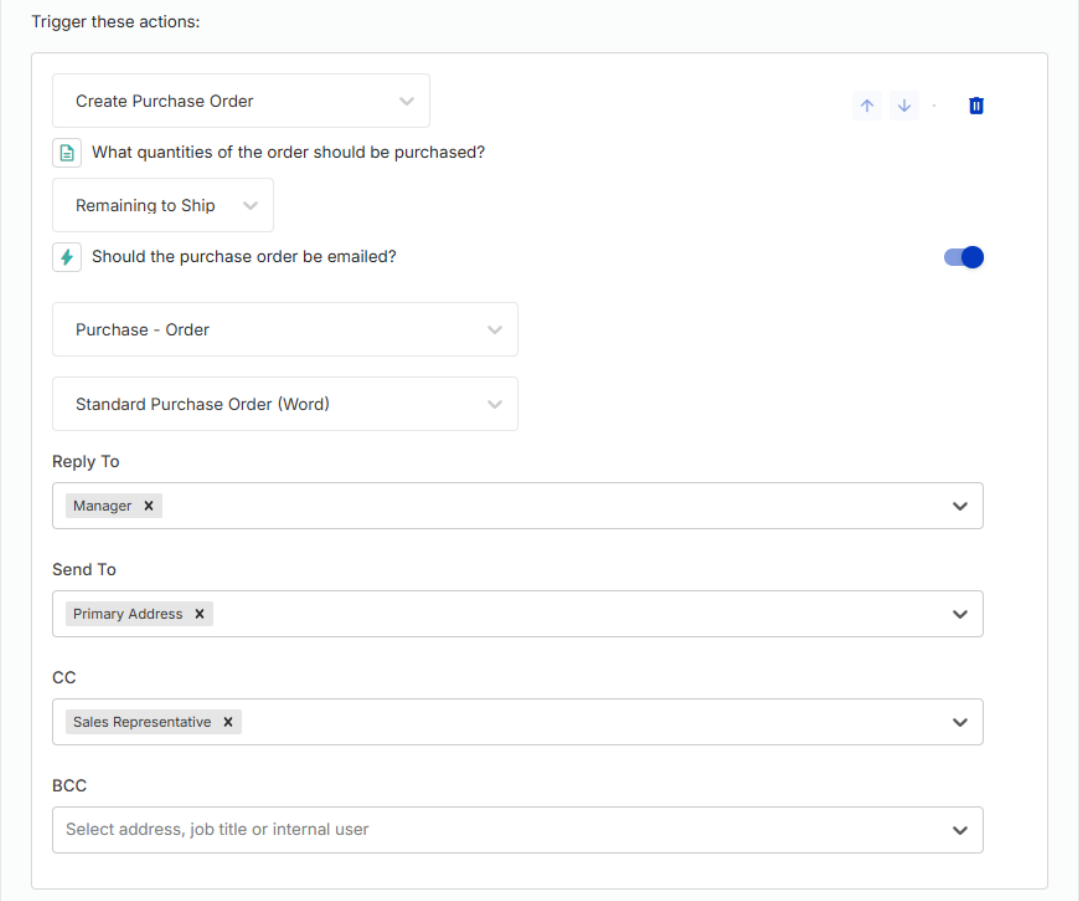
Configure Automatic Purchase Orders

When configuring workflows in Mission Control, "Create Purchase Order" can be selected as a workflow action that triggers when orders enter or leave queues. The following screenshot shows the action dropdown list for entry actions. To trigger a workflow action when orders leave queues instead, use alternate paths.



Select the "Create Purchase Order" action and new options will appear so you can configure how each PO is

generated. You can also set up automatic emails to be sent to the vendor, sales rep, and anyone else who needs to be notified that the PO was created.



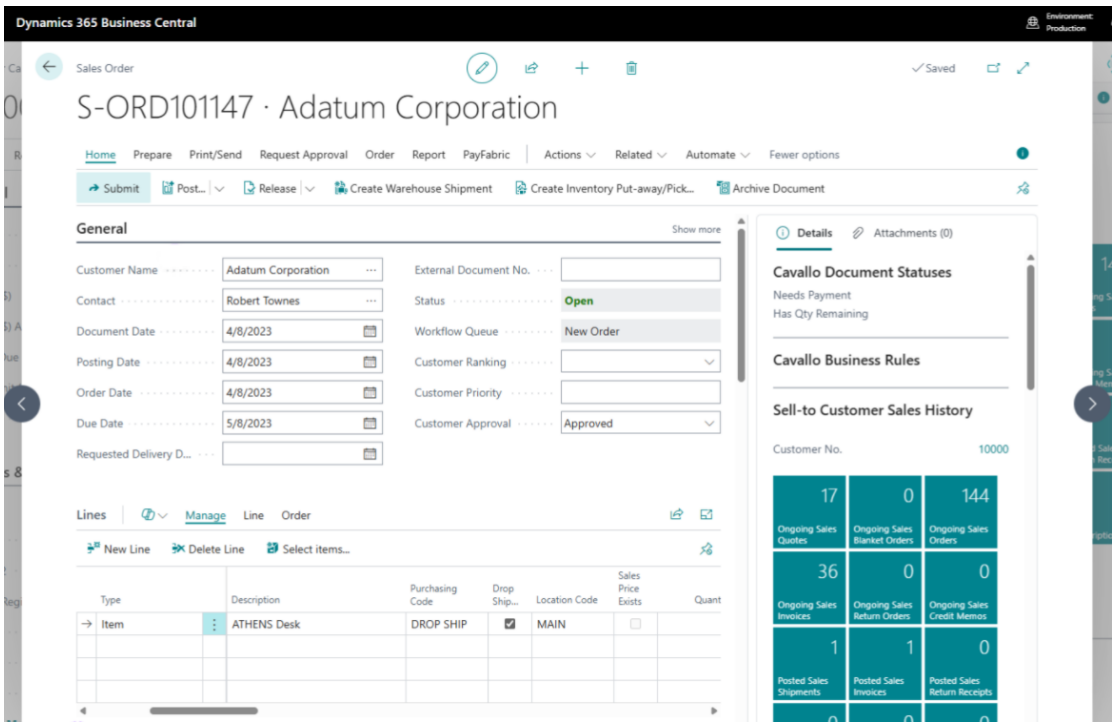
After the action is fully set up, remember to save and publish the workflow to update Business Central.

For a step-by-step guide on configuring the Create Purchase Order action for a fully automated drop ship workflow, check out the Workflow Scenario Library.

Test Automatic Purchase Orders

In BC, create a new sales order or use an existing test order.

Add at least one sales line for an item that has a replenishment vendor set up, and assign a Purchasing Code like DROP SHIP to the line.

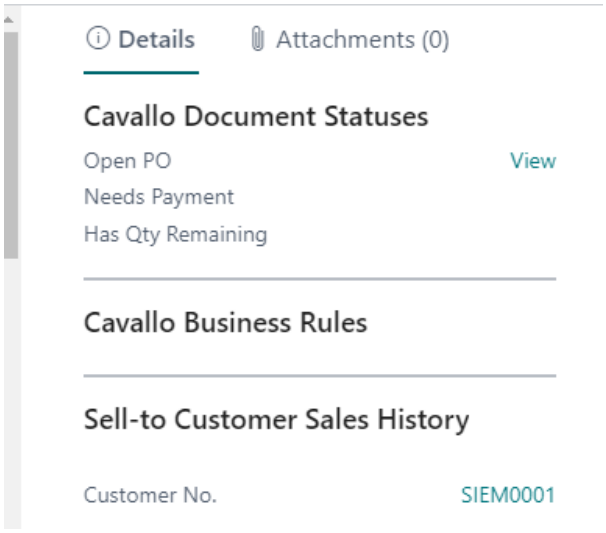


Click the Submit button to send this order through workflow. The workflow will evaluate the sales order against all configured conditions and run any actions in the process.

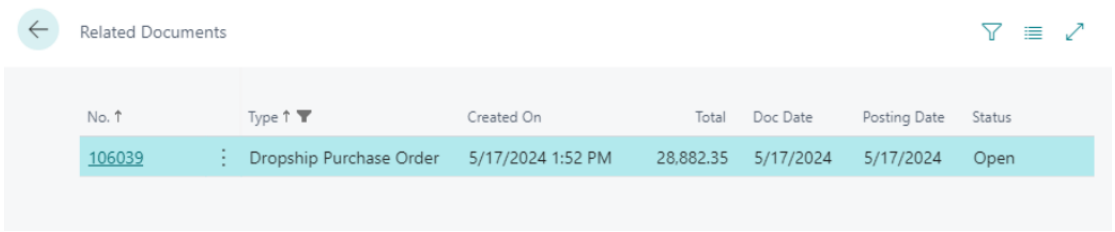
You may need to submit multiple times to push your test order through the workflow to the right point to trigger PO generation. Refer to your workflow configuration and make sure the PO generates when you expect, either when orders enter or leave your specified queue.

Once the workflow action runs, Mission Control automatically links each PO line to its corresponding sales line. This can be seen on each sales line in the PO Number column, and on each PO line in the SO Number column.

The sales order's Cavallo Document Status fact box will also show the Open PO status with a View button.



Click the View button to see all open purchase orders for that order.

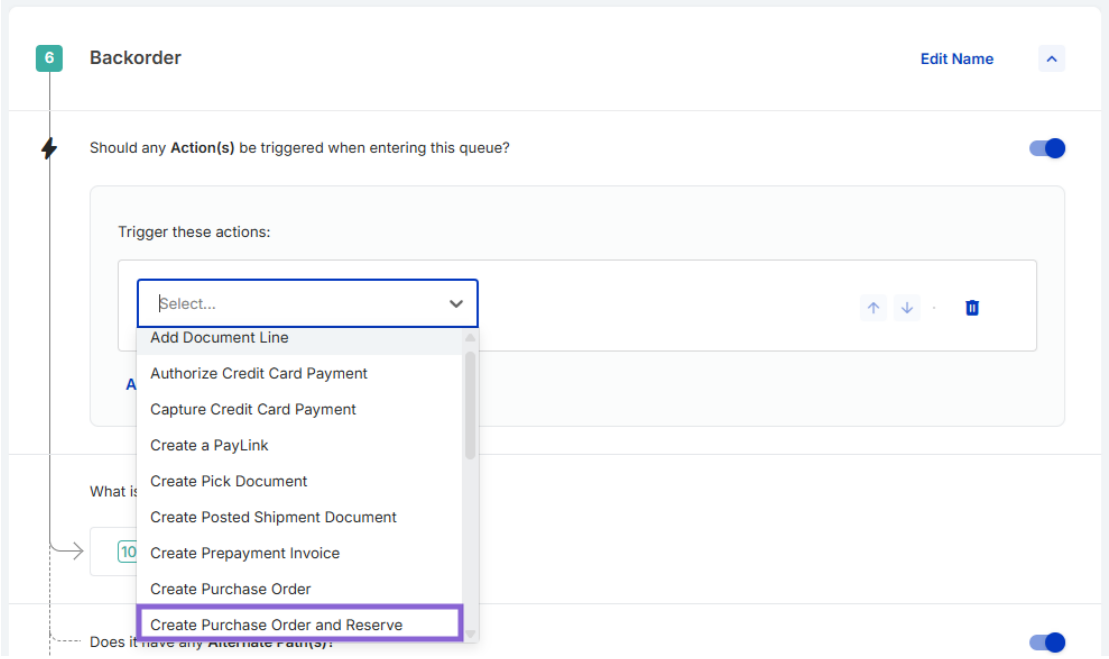


Create Purchase Order and Reserve

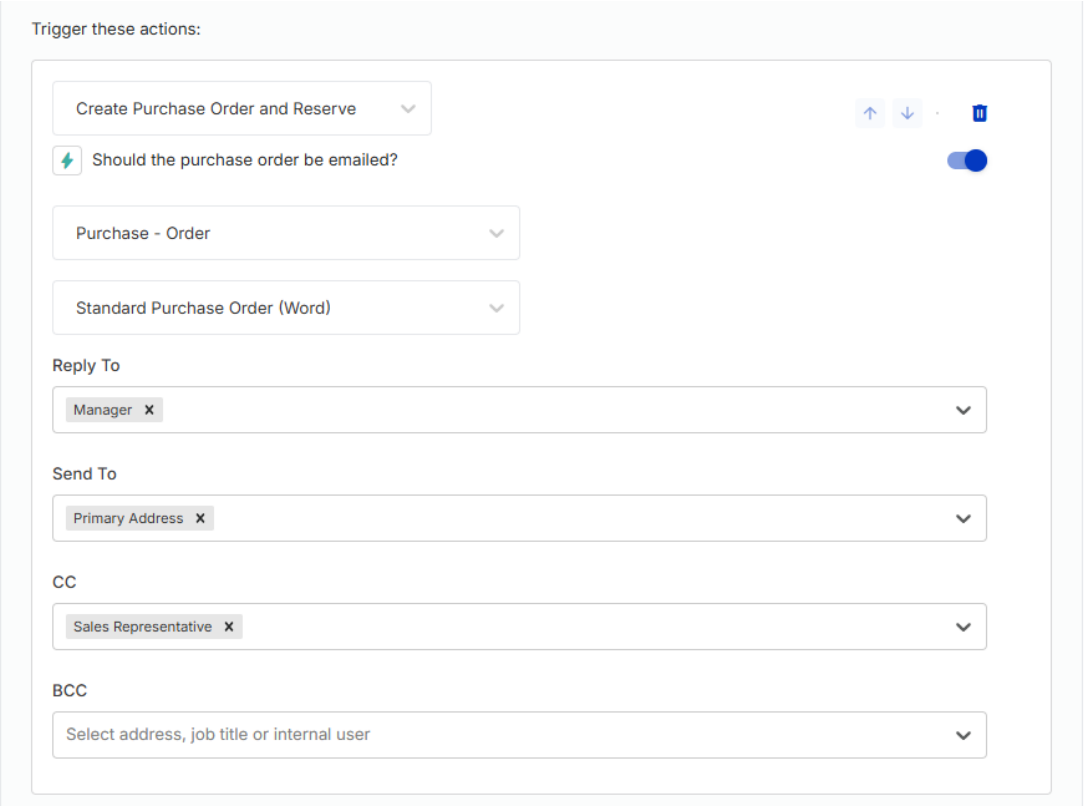
In Business Central, reservations can allocate inventory for many different document types to keep inventory numbers accurate and tied directly to applicable sales orders, inventory transactions, and more. Mission Control's workflow engine can automate the reservation process when it generates new purchase orders for order line items that couldn't be fully reserved due to inventory shortages.

Configure Automatic Purchase Orders with Reservations

When configuring workflows in Mission Control, "Create Purchase Order and Reserve" can be selected as a workflow action that triggers when orders enter or leave queues. The following screenshot shows the action dropdown list for entry actions. To trigger a workflow action when orders leave queues instead, use alternate paths.



Select the "Create Purchase Order and Reserve" action and new options will appear so you can configure how each PO is generated. You can choose to set up automatic emails to be sent to the vendor, sales rep, and anyone else who needs to be notified that the PO was created.



After the action is fully set up, remember to save and publish the workflow to update Business Central.

Automatic Workflow Purchasing and Fulfillment

By integrating "Create Purchase Order and Reserve" with Mission Control's document statuses and automatic actions, you can automate PO generation and order fulfillment. Sales orders for items that are currently in stock can go straight to the warehouse, while backorders can automatically generate purchase orders and reserve inventory for those backordered sales lines, then proceed to the warehouse once those items have been received.

This uses the same configuration as the automatic backorder processing outlined in the Workflow Scenario Library, with a simple tweak:

- The Backorder queue should have an On Entry action for "Create Purchase Order and Reserve"

FAQs

1. Where is the workflow submit button located?

- If the Submit button is not visible on your order entry screen in BC, check under the actions menu for a "Cavallo" option. If the button is not available in this section, Mission Control may not be configured correctly. Please reach out to our support team 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 for sales orders in BC, and the SO Number field can be found in the purchase line personalization menu for purchase orders in BC. These are fields that Mission Control updates in Business Central to link sales lines to their PO lines after it generates POs for sales orders.

3. Where is the Qty Remaining field?

- By default, the Qty Remaining field can be found in the sales line personalization menu on sales orders. This is a field that Mission Control calculates and pushes to Business Central.

4. How is Qty Remaining calculated?

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