Mission Control Release Notes

Cavallo Support - 2026-10-02 - Release Notes

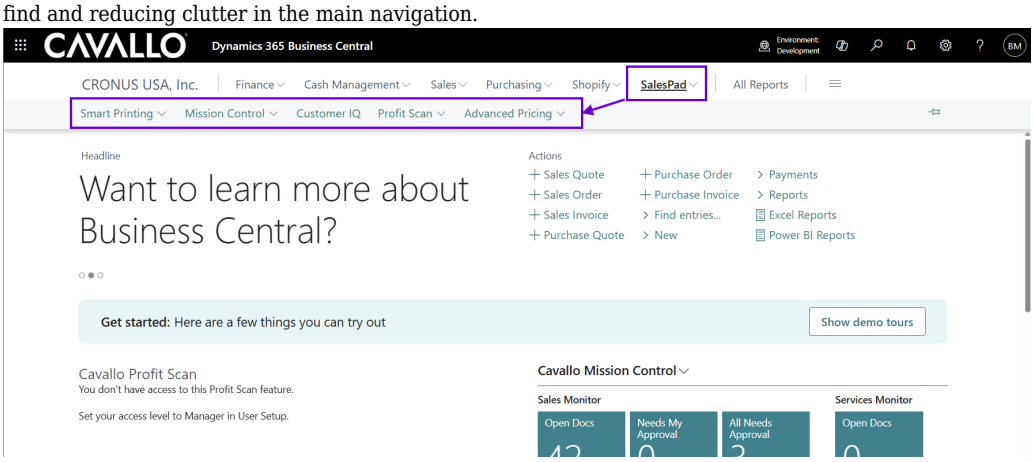
October 1st, 2026

*Special Note: Updated navigation in the new release!

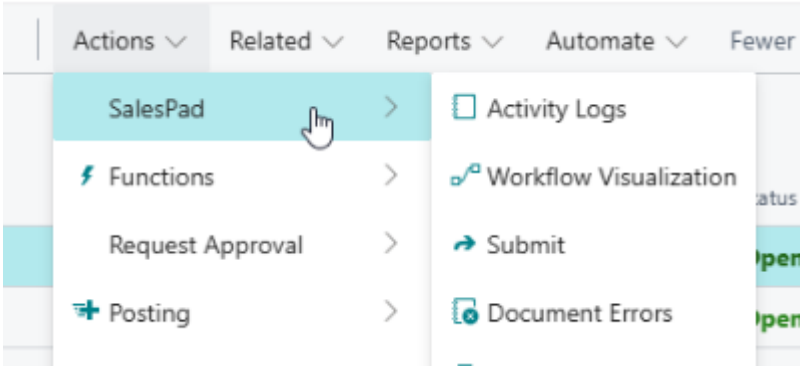
In this release

The upcoming Mission Control release simplifies our Business Central navigation.

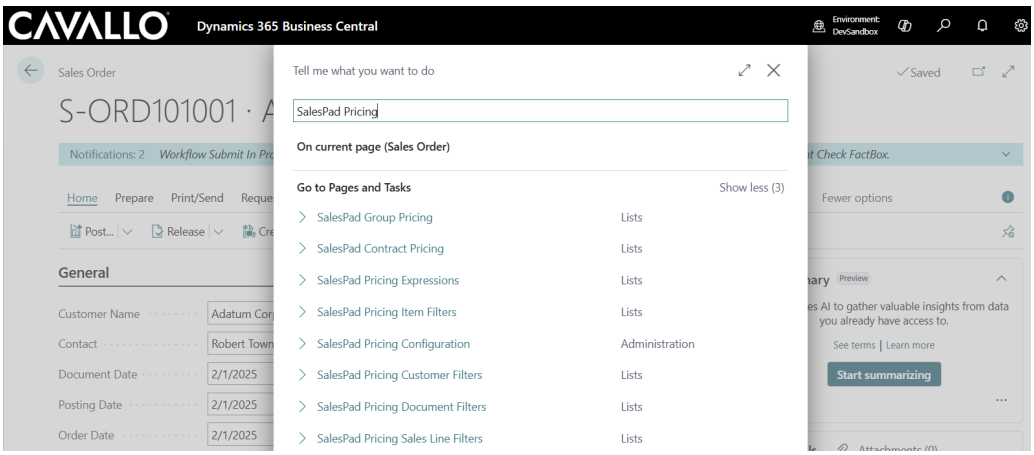
- **Consolidated Navigation Options.** Navigation options for all SalesPad for Business Central products are now consolidated under a single SalesPad menu in Business Central, making our products easier to find and reducing clutter in the main navigation.



- **'SalesPad' Action Category.** In addition to the consolidated main navigation shown above, the Action menu option has been renamed from Cavallo to SalesPad, reflecting our product family name rather than our company name.



- **Searchability Upgrade.** Our products and features can now be found in Business Central's search feature via the company name (Cavallo), the product family name (SalesPad), or the product name (Mission Control, Advanced Pricing, etc.). For example, searching "SalesPad" or "Cavallo" returns all of our products, and searching either "SalesPad Smart Printing" or "Cavallo Smart Printing" returns Smart Printing results.



September 14th, 2026

In this release

This Mission Control release improves the document action configuration experience and refreshes the Custom Field page after publishing.

New features

- **Searchable field lists in document actions.** When configuring the Add Document Line or Update Document action, you can now type to filter the Target and Source Field lists, using the same filtering behavior as Workflow Condition configuration. This makes it quicker to locate the correct field instead of scrolling through a long list.

Fixes

- The Custom Field page now refreshes automatically after you select Publish Now.

August 31th, 2026

Fixes

- In Business Central, the Workflow Visualization model/map now displays in its modal instead of showing a "Page not found" error, including from Sales Monitor, Return Monitor, and Service Monitor pages, queues, and document actions.
- In Mission Control User Groups, adding or removing multiple users at once now saves correctly.
- The list of sales representatives available when setting a condition check in Mission Control now includes all sales reps instead of only the first page of results.
- The approver field on business rules now expands to fit all selected users instead of overflowing and covering other fields below it.
- Sessions no longer hang when they expire while using cloud apps.

- The D365 TEAM MEMBER and D365 BASIC permission sets in Business Central now include the Cavallo-specific permissions, matching the other D365 permission sets.

August 17th, 2026

In this release

This Mission Control release improves login reliability, expands workflow field options, and refines how custom fields publish.

New features

- **Inventory Reservation Reassignment.** The Inventory Reservation Reassignment feature is now generally available to all users without requiring explicit enablement.

- **Custom fields app upgrades.** When the upgrade behavior is enabled, publishing a new version of the custom fields app upgrades it in place instead of uninstalling the prior app first. Linked extensions stay functional and existing custom field data is retained when the upgrade is schema-compatible.

- **Backend-mapped fields in workflow conditions.** Customer, Sales Document, Sales Line, Service Document, Service Line, and Item fields that are mapped in the backend are now available during Workflow configuration, including conditions, business rules, and update fields actions. Admins can configure workflows against these fields without waiting on a code change.

Improvements

- The integrate existing fields table search now matches input against publisher names as well as captions, so searching for an extension by its publisher works directly.

- Users who do not have an email address when logging in through Cavallo-AAD are matched using their UPN instead, with any existing email address taking priority. If both are missing or a malformed token is returned, the login redirects to an error page instead of showing a blank white screen.

Fixes

- The Oldest Due Date on customer aging now reflects the earliest due date among the customer's open invoices with a remaining amount greater than $0, calculated on demand during workflow submissions.

- Emails sent by Mission Control now display the company logo set for the company instead of the default Cavallo logo.

August 10th, 2026

In this release

This Mission Control release improves custom field publishing and workflow configuration, and fixes email and login issues.

New features

- **Inventory Reservation Reassignment.** Inventory Reservation Reassignment is now available to all users without requiring any setup or manual enablement.

- **Backend-mapped fields in workflows.** Many new fields are are now available when configuring workflows, including conditions, business rules, and update fields actions for Customer, Sales Document, Sales Line, Service Document, Service Line, and Item. You can configure workflows against the fields you need without waiting on a code change.

Improvements

- **Custom field app upgrades.** Publishing custom fields now upgrades the existing custom fields app in place instead of uninstalling it first, so linked extensions keep working and existing custom field data is retained when the upgrade is schema-compatible.

- **Integrate existing fields search.** The search box on the integrate existing fields table now matches input against publisher as well as caption, so searching for an extension by name works without guessing its field captions.

Fixes

- **Business rule operations with duplicate custom field names.** Business rules that use custom fields sharing a name across different entities now evaluate correctly: business rule status panels display the correct status, the approve and reject dialog opens without errors, and document submission progresses through the workflow as expected.

- **Company logo in emails.** Emails now display the company logo set for a company instead of always using the default Cavallo logo.

- **Login failures without an email address.** Users logging in through Cavallo-AAD who have no email on their account now sign in using their UPN, and malformed authentication responses redirect to an error page instead of showing a blank screen.

July 27th, 2026

In this release

This Mission Control release improves workflow setup, email delivery, and the Add Document Line action.

New features

- **Days Past Due condition.** Days Past Due is now available as an option in Business Rules, Automated Actions, and Workflow Actions.

Improvements

- Onboarding for cloned companies now imports the existing workflow queues from Business Central instead of creating default workflows, preserving workflow structure and document positions.

Fixes

- The Add Document Line workflow action now assigns the next line number automatically, so new lines add at the end of the document and can be added repeatedly without error.
- The Webhook Test button in Actions now connects to the webhook endpoint and reports success or failure for the entered URL.
- Service Workflow queues created during onboarding now have a primary path set automatically.
- In workflow queue Action drop-down fields, long item names now wrap to two lines with an ellipsis instead of aligning to the top of the field.
- Email notifications send successfully when the Company Logo URL is invalid, with the email sent without the image.

July 9th, 2026

In this release

This Mission Control release improves workflow setup, business rules, and document pages.

New features

- **Quote Accepted.** The Quote Accepted field from Business Central now appears in the Integrate Existing Fields menu in Custom Fields, so it can be added to a workflow as a custom field.
- **Return order page updates.** The Sales Return Order page now matches the functionality of the Sales Order, Quote, and Invoice pages, including the Move workflow action option in the Action menu and current workflow handling.

Improvements

- The warehouse shipment workflow action can now be configured to generate only an open warehouse shipment instead of both a shipment and a pick document.

Fixes

- In Workflow Setup, changing the sequence of paths or actions under a queue and saving again now displays the sequencing as it was saved.
- Date field conditions using the "is..." operator in Workflow Setup now compare dates correctly, including comparisons to today's date.
- Business rules on quotes now send the email to approvers when documents enter their queue.
- In Business Rules, selecting an approver whose email has no display name now shows the email address instead of an X in the Approvers field.

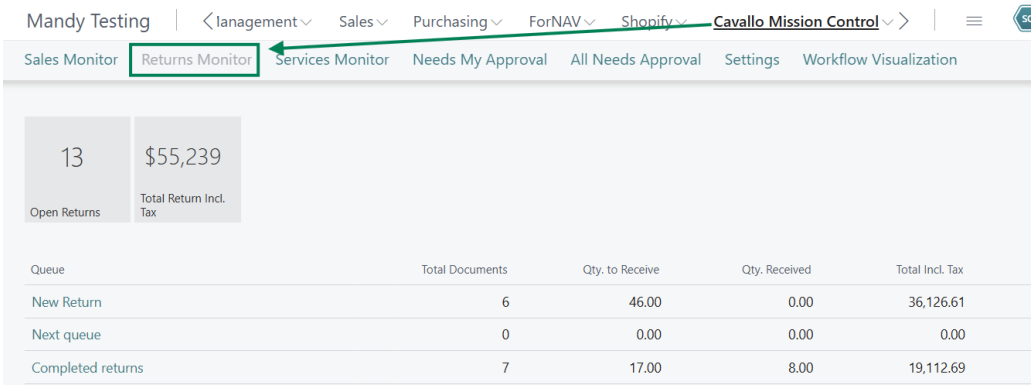
June 24th, 2026

In This Release

A new Mission Control release is now available. This release introduces new capabilities for monitoring returns and undstanding how long a sale has been waiting in a given workflow queue.

Highlights

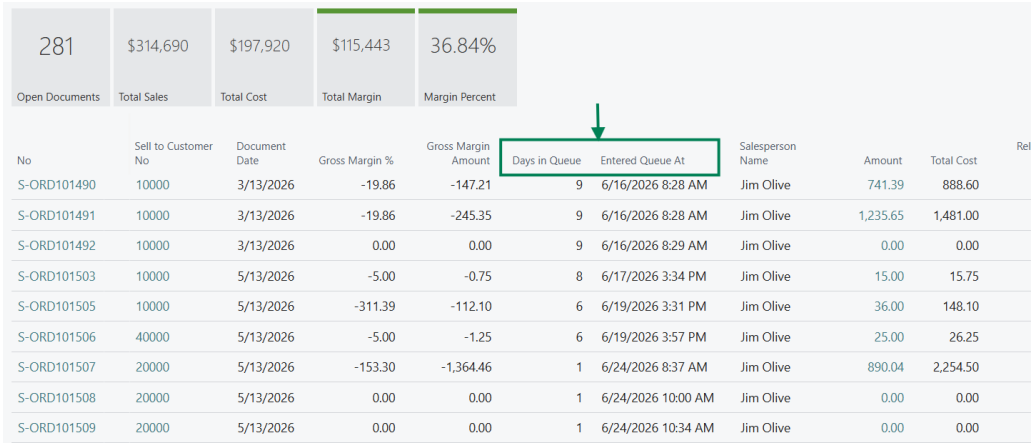
- A new **Returns Monitor** has been added in Business Central to give you the visibility you need into where sales returns stand in the process.



Queue	Total Documents	Qty. to Receive	Qty. Received	Total Incl. Tax
New Return	6	46.00	0.00	36,126.61
Next queue	0	0.00	0.00	0.00
Completed returns	7	17.00	8.00	19,112.69

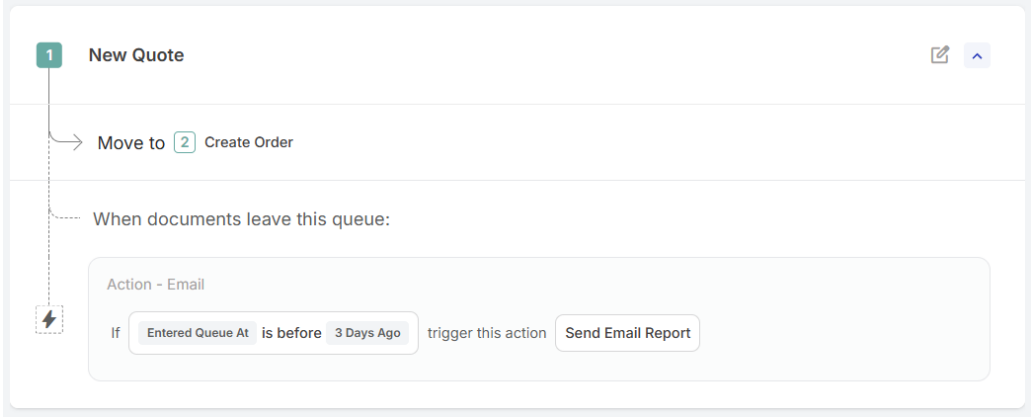
- A new **Days in Queue** feature has been added to give you additional visibility and control over your sales. Days in Queue is a new column added to the Sales Monitor in Business Central, conveying the age of each document based on when they entered that queue. Not only can you clearly see this information when working in BC, but you can also use a new **Entered Queue At** field when configuring your worklfow that will allow you to conditionally route or take special actions based on how long a sale has been sitting in a given queue. (e.g. if a document has been sitting in queue XYZ for more than 3 days, notify the sale sales rep).

New columns in Sales Monitor:

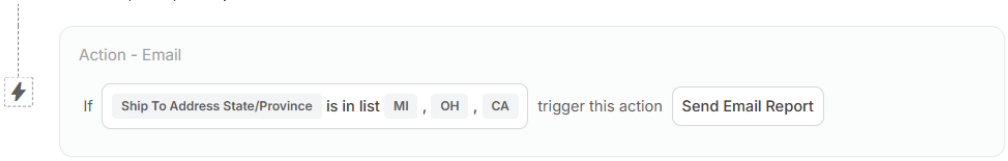


No	Sell to Customer No	Document Date	Gross Margin %	Gross Margin Amount	Days in Queue	Entered Queue At	Salesperson Name	Amount	Total Cost	Rel
S-ORD101490	10000	3/13/2026	-19.86	-147.21	9	6/16/2026 8:28 AM	Jim Olive	741.39	888.60	
S-ORD101491	10000	3/13/2026	-19.86	-245.35	9	6/16/2026 8:28 AM	Jim Olive	1,235.65	1,481.00	
S-ORD101492	10000	3/13/2026	0.00	0.00	9	6/16/2026 8:29 AM	Jim Olive	0.00	0.00	
S-ORD101503	10000	5/13/2026	-5.00	-0.75	8	6/17/2026 3:34 PM	Jim Olive	15.00	15.75	
S-ORD101505	10000	5/13/2026	-311.39	-112.10	6	6/19/2026 3:31 PM	Jim Olive	36.00	148.10	
S-ORD101506	40000	5/13/2026	-5.00	-1.25	6	6/19/2026 3:57 PM	Jim Olive	25.00	26.25	
S-ORD101507	20000	5/13/2026	-153.30	-1,364.46	1	6/24/2026 8:37 AM	Jim Olive	890.04	2,254.50	
S-ORD101508	20000	5/13/2026	0.00	0.00	1	6/24/2026 10:00 AM	Jim Olive	0.00	0.00	
S-ORD101509	20000	5/13/2026	0.00	0.00	1	6/24/2026 10:34 AM	Jim Olive	0.00	0.00	

Mission Control Configuration Example:



- New '**Is In List'/'Is Not In List' operators** are available for text fields when configuring workflow. This unlocks exciting new ways to consolidate and improve configuration. (e.g. "perform x action if Shipping State is in MI, OH, CA")



Fixes & Improvements

- Fixed an issue where the Quantity on Hand field did not function correctly in Workflow Conditions.
- Fixed incorrect mapping for the Return Quantity to Receive field in Workflow Conditions.
- Fixed incorrect visual styling for Path/Action Name fields.
- Fixed toast notifications rendering behind modal backdrops.
- Updated the Churn Setting subtitle with a disclaimer to clarify threshold sync behavior. (Customer IQ)
- Updated license messaging to provide clearer feedback during trial initiation.

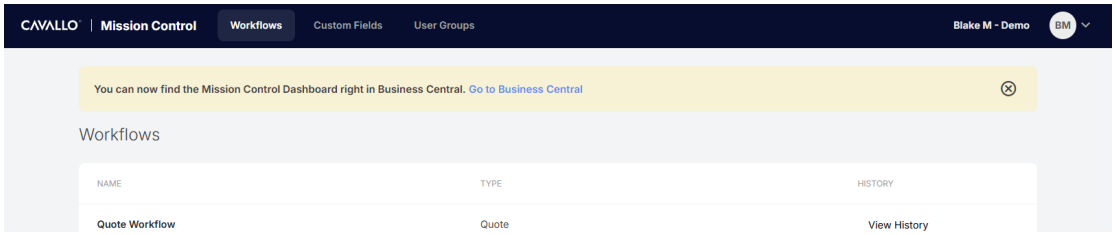
May 15th, 2026

In This Release

A new Mission Control release is now available. This release enhances reservation management, expands email reporting, and offers workflow stability improvements across Mission Control.

Special Note

The Mission Control Dashboard now lives directly in Business Central as a core experience, no longer requiring a separate Mission Control session. If you've bookmarked the old version, you'll see a banner with a one-click link to the new location. All future dashboard improvements will in Business Central, so be on the lookout for new features in the coming releases.



Highlights

- **Faster customer identification on the Customer IQ Dashboard** — customer names now appear directly on the grid.
- **More accurate inventory during reservation reassignment [BETA FEATURE]** — control reassignment priority and automatically deplete holding order quantities.
- **Billing contacts loop in automatically** — email reports can now be sent to the Bill-to address.

What's New

- View customer names directly on the Customer IQ Dashboard data grid for improved visibility.
- Set custom sorting orders for source documents during reservation reassignment to prioritize specific lines.
- Deplete reserved line quantities automatically when reassigning reservations to keep inventory records accurate.

- Send email reports to the Bill-to contact address, ensuring billing stakeholders receive necessary documentation.
- Workflow actions and user selectors in Mission Control are now alphabetized for faster navigation and selection.

Fixes & Improvements

- **Fixed** the Warehouse Pick link in Business Central Related Documents, which was previously broken due to missing location code and warehouse employee validation.
- **Fixed** an issue where queue names containing double quote characters caused the Workflow Visualization to crash.
- **Fixed** inconsistent queue name displays in Workflow Setup after editing.
- **Fixed** unsaved changes prompts appearing incorrectly when canceling queue name updates.
- **Fixed** custom field paging information not resetting when search or filter criteria changed.
- **Fixed** an issue where deleted custom fields did not clear from filters and search immediately.
- **Fixed** an issue with service item line business rules in Core App that prevented expected validation from running.
- **Fixed** subscription insert operations to properly handle upserts, preventing duplicate or failed subscription records.
- **Fixed** Chargebee expiration calculation logic in User Management so subscription expiration dates display correctly.
- **Fixed** data source connection info storage and metadata mapping during company creation, resolving setup failures for new companies.
- **Fixed** login flow, redirecting users to their intended destination after authentication completes

April 13th, 2026

In This Release

Navigation, workflow, and reliability improvements.

Highlights

- Faster, more reliable activity logs with improved indexing and search behavior.
- Smoother workflow editing experience with better navigation safeguards, refined toasts, and steadier UI interactions.

What's New

- **Navigation and Pages**
  - Main navigation options have been reorganized into the left component for quicker access.
- **Workflow Configuration**
  - A navigation guard now warns users before leaving workflow configuration with unsaved changes.
  - Workflow document actions are filtered by entity so only relevant actions appear.
  - Toast styling has been refreshed for better readability after publishing.

Fixes & Improvements

- **Fixed** an incorrect mapping for the workflow Ship To Address Code so the correct value is now applied.
- **Fixed** an "invalid_document_type" error that prevented return orders from being submitted.
- **Fixed** an issue that prevented documents without a customer from being submitted.
- **Fixed** toggles that sometimes required two clicks to activate.
- **Fixed** the Publish button animating or shifting position while saving workflow queue edits.
- **Fixed** toast message color on workflow publish so it now displays in the correct contrast.
- **Fixed** reservation reassignment activity logging in Business Central, including iframe cookie handling and a sales document navigation issue.
- **Updated** activity log performance with improved indexing and preloaded related fields for faster responses.
- **Fixed** queue primary sequence numbers not updating in the main workflow list after a reorder.
- **Fixed** a missing "Page Not Found" experience so users now see clear feedback when a route does not exist.
- **Fixed** the settings link in the user menu so the entire row is clickable.
- **Fixed** rendering of user-defined field context children when UDF data has not finished loading.
- **Fixed** jumpiness when interacting with custom field tables.
- **Fixed** an issue where automated actions were shown for service document workflows where they did not apply.
- **Fixed** the "Remain in Queue" path selector behavior.
- **Fixed** rendering of the delete alternate path dialog.
- **Fixed** automated action log search, including resetting page number on search changes and preventing the filter menu from opening when pressing Enter.
- **Fixed** validation that was not clearing properly and improved a non-human-readable right target message.
- **Fixed** workflow condition date inputs not rendering correctly.

January 8th, 2026

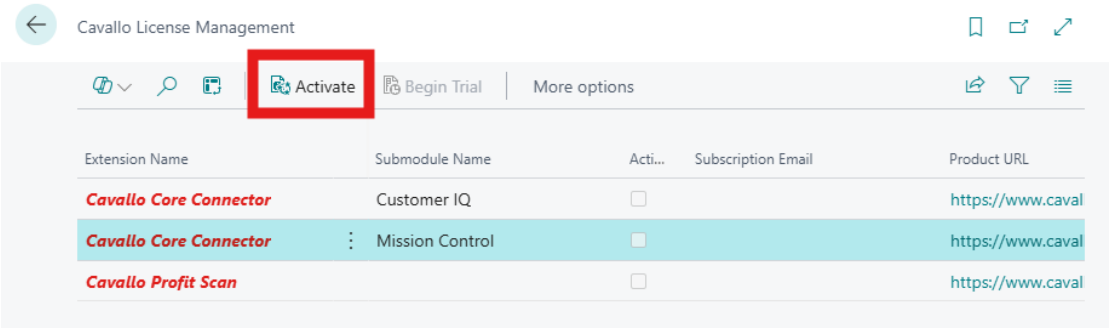
The latest version of Mission Control is now pending release.

Important Note: Action Required After Installation

License Activation Needed

This release includes changes to how licensing is handled. Once you've installed the new version of Mission Control, we recommend that an administrator do the following in your environment:

1) Visit the **Cavallo License Management** screen
2) Select the **Cavallo Core Connector** row ("Mission Control" submodule)
3) Click **Activate**



This ensures your system recognizes the new license. If this step is skipped, users may not see the Mission Control actions or UI within Business Central.

New Major Feature

Added a new Workflow Action called "Update Costs". The Update Costs action updates the cost field on the document's lines with the current cost from the respective item record.

Additional Changes

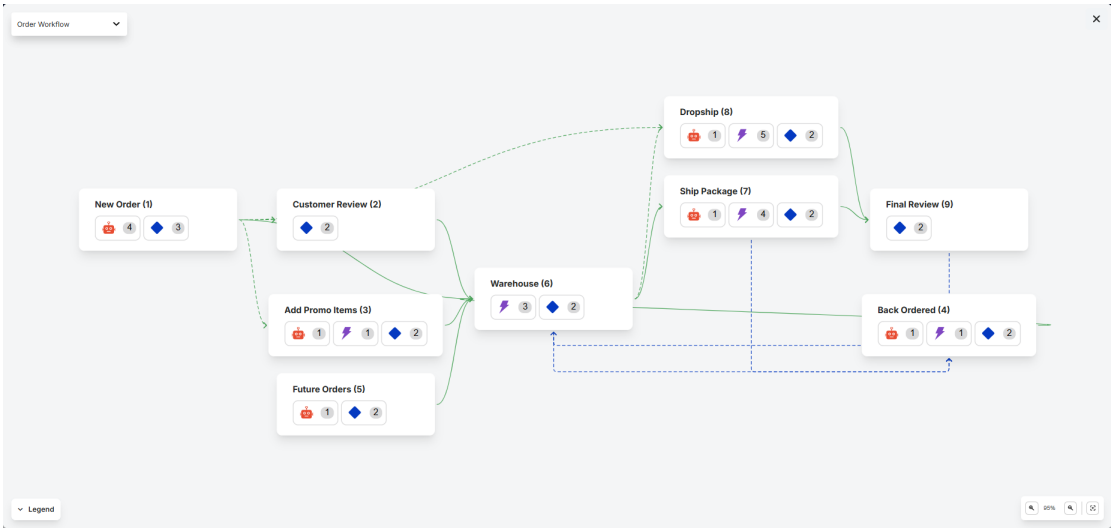
- **Fixed** column header text display to prevent overlap and improve readability throughout Mission Control.
- **Fixed** currency and percentage field type handling in workflow conditions.
- **Updated** workflow condition editor to properly reset values when loading fixed value conditions.
- **Updated** sales document row formatting for improved readability.

November 24th, 2025

The latest version of Mission Control is now available.

New Major Feature: Workflow Visualization

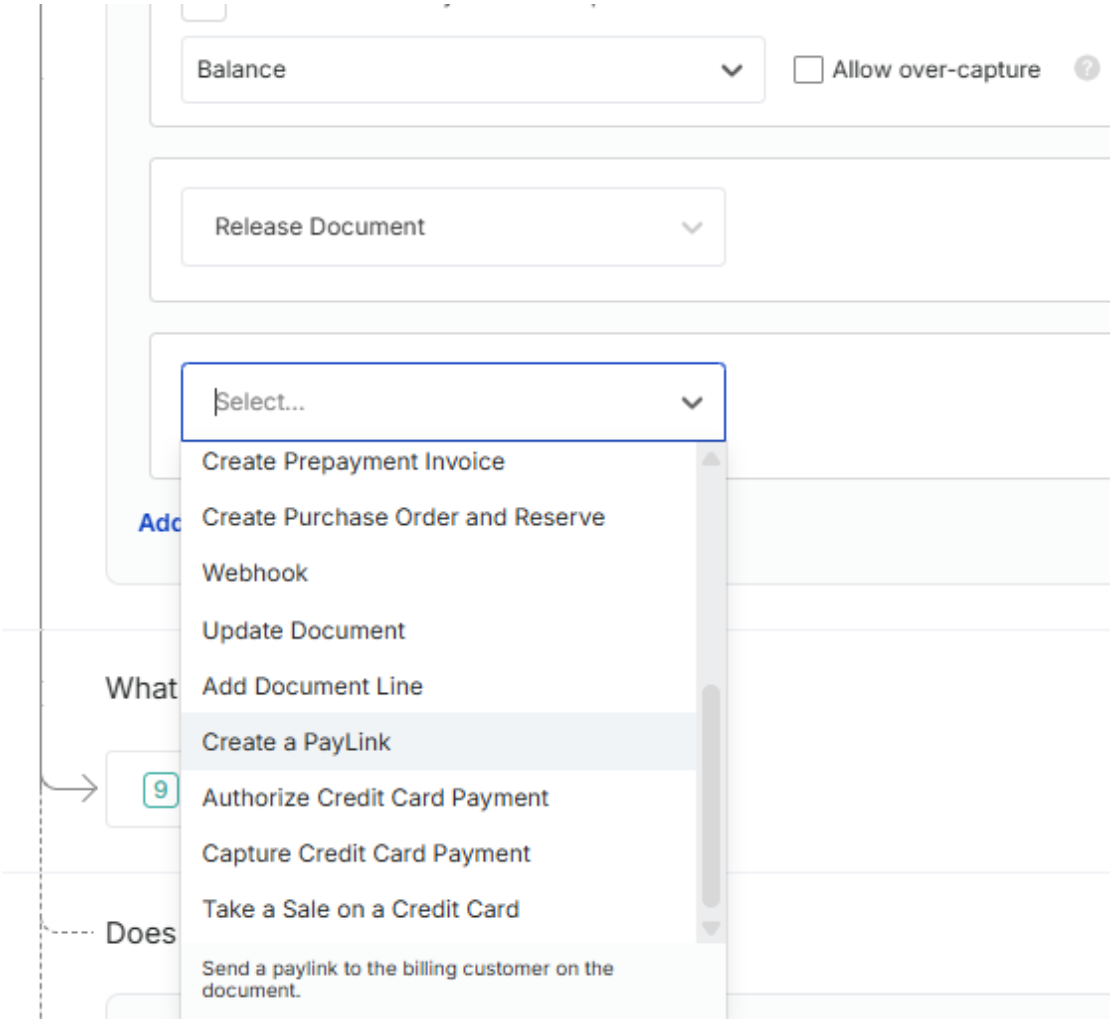
- **Visual Workflow Display:** Users can now see a complete visualization of their workflows directly in Business Central and Mission Control, making it easier to understand document routing and approval processes at a glance.
- **Queue Status Indicators:** Workflow queues now display visual status chips that clearly show which queues have business rules or automated actions applied, helping administrators quickly identify configured workflow logic.
- **Expandable Workflow Nodes:** Users can expand individual workflow nodes to see detailed information about the rules and actions that apply to specific queues, providing deeper insight into workflow behavior.
- **Interactive Zoom Controls:** The workflow visualization includes intuitive zoom controls with manual input capability, allowing users to type their preferred zoom percentage for optimal viewing of complex workflows.



This feature empowers users to better understand, troubleshoot, and optimize their approval workflows without navigating through multiple configuration screens.

New Major Feature: Paylink Support via Workflow

- **Workflow-Triggered PayLinks:** Payment links can now be automatically triggered through workflow actions, streamlining the payment collection process and reducing manual intervention.
- **PayLink Status Tracking**: Users now have clear visibility into the status of payment links, making it easier to track which invoices have pending, completed, or failed payment attempts.
- **Optimized Cash Receipt Generation:** Cash receipts are now generated after customers complete payment rather than when the PayLink is created, ensuring accurate financial records and reducing unnecessary system processing.



Additional Changes In This Release

- **Resolved Business Rule Banner Display:** Fixed an issue where the business rules banner would briefly appear after document approval and submission, eliminating user confusion during the approval process.
- **Corrected Currency Symbol Display:** Mission Control tiles in Business Central now correctly display the appropriate currency symbol for each company instead of a hardcoded dollar sign.
- **Fixed Workflow Condition Builder:** Resolved an issue where "No Results" text would incorrectly persist when tabbing through the workflow condition builder with a populated search value.
- **Improved Document Approval Error Handling:** Fixed an error message that appeared when approving business rules from the Mission Control monitor, even though documents were successfully submitted.
- **Enhanced Keyboard Navigation:** Actions and Submit buttons now properly receive focus when tabbing, and business rule lists are fully navigable via keyboard, improving accessibility for all users.
- **Fixed Condition Builder Operator Selection:** Users can now reselect the same operator after changing a field in the condition builder without needing to select a different operator first.
- **Corrected Product Label Display:** The product selector in Custom Fields now displays the correct active product name instead of showing "Mission Control" for all companies.

- **Resolved Workflow Zoom Increments:** Fixed an issue where using Ctrl+Scroll to zoom the workflow visualization would add inconsistent increments instead of smooth 5% adjustments.

- **Eliminated Search Bar Display Issue:** Removed the "Mega X" icon that would incorrectly appear in the Mission Control search bar after opening other modals.

- **Improved Show More/Less Alignment:** The "Show More" and "Show Less" buttons now maintain proper alignment regardless of column width.

- **Fixed PayFabric Payment Processing:** Resolved an issue where PayFabric transactions could report as both successful and failed simultaneously, ensuring accurate payment status reporting.

- **Corrected Workflow Submission Race Condition:** Fixed a timing issue that could cause PreSubmissionWorkflow errors when multiple processes attempted to update submission status simultaneously.

- **Removed Legacy Changelog Processing:** Eliminated unnecessary changelog handling logic and maintenance jobs from Mission Control, improving system performance and reducing maintenance overhead. (This is still available as a setting)

October 2nd, 2025

The latest Mission Control update is now live on Microsoft Appsource! The latest version includes the following changes:

Major Updates: Updates to the “Move” Action

In this release, we’re updating how the “Move” action works to ensure you gain the full value of Mission Control’s automation and workflow engine.

Key Changes:

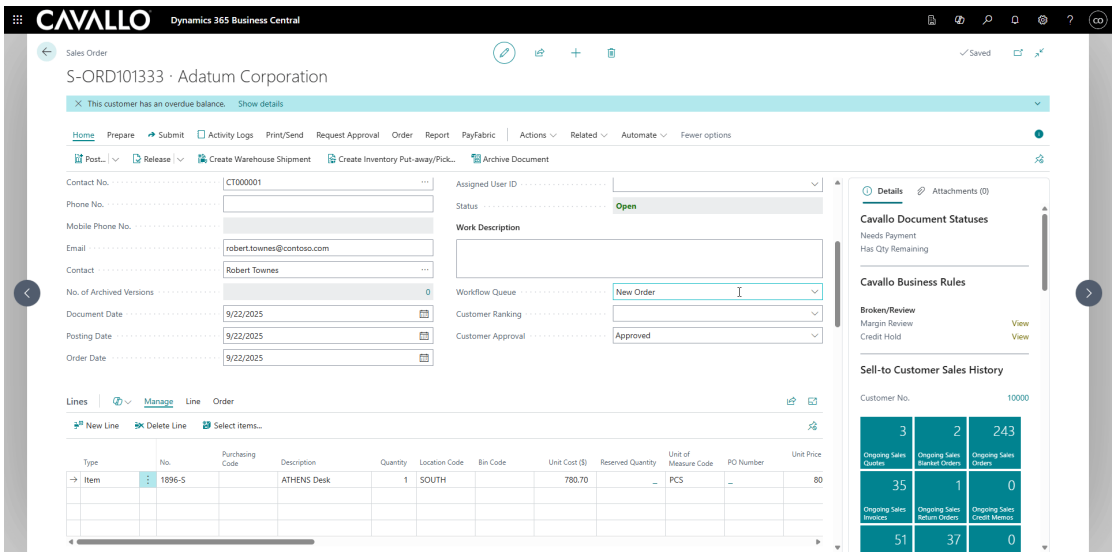
Submit Documents (Recommended): The primary method to move documents between queues, applying all workflow routing, automations, and business rules.

Move Documents: Still available as an admin-level action, but will now be accessed only from the Cavallo menu (or personalized hotbar). The workflow dropdown in Business Central will become read-only to promote consistent submissions.

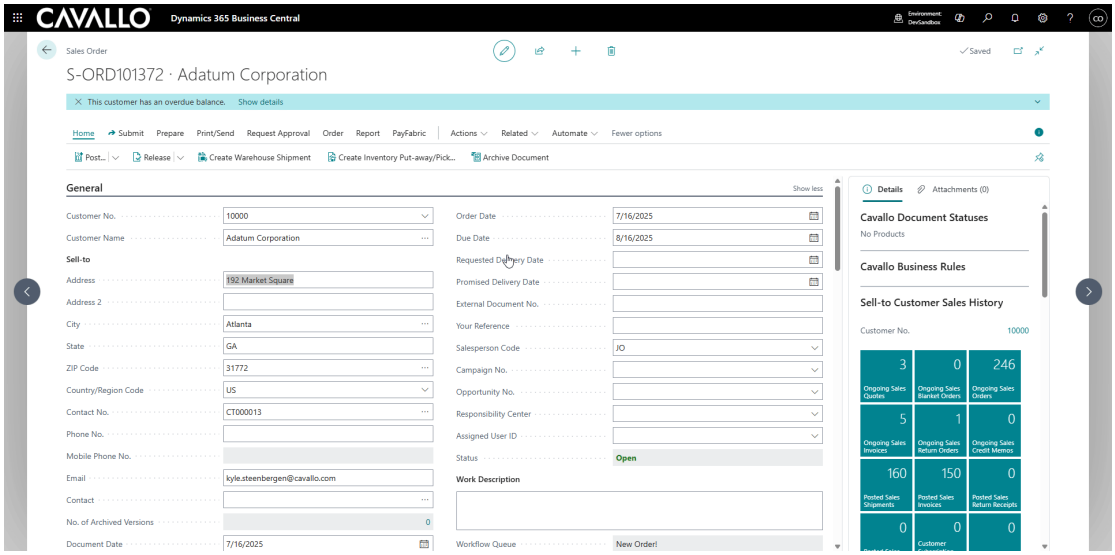
Why this matters:

- Improves process visibility by ensuring routing and rules are applied.
- Strengthens analytics and reporting by eliminating blind spots caused by direct moves.
- Helps teams scale effectively by maximizing automation and enforcing business rules.
- This change takes effect once your organization updates to the latest Mission Control version from AppSource. Until then, moves will continue working as before.
- For guidance on workflow setup or best practices, our team is here to help.

Old "Move" Experiance:



New "Move" Experiance:



Minor Changes:

- **Added** company and user identifiable information to our company invite templates
- **Added** the ability to search for columns in the Mission Control column chooser
- **Added** a new workflow condition allowing users to route or evaluate their orders based on customer aging
- **Fixed** an error message in Business Central regarding failure to fetch reports
- **Fixed** several accessibility issues with user management around trap focusing or using hotkeys for navigation
- **Fixed** an error when attempting to load the activity logs from within Business Central
- **Fixed** an issue where failed Mission Control actions appeared as a success then a failure in the activity logs
- **Fixed** an incorrect counting issue with the related documents column in Business Central
- **Fixed** an issue with triggered actions that would leave documents with broken business rules in a fragile state
- **Fixed** an issue with activity logs where specific actions where missing after a failure then a pass scenario
- **Fixed** a bug within custom fields that would cause publishing failures when utilizing base Business Central fields
- **Fixed** an error message that would occur when automatic actions break a business rule
- **Fixed** the “balance of shipped items” setting in payment automation
- **Updated** the existing queue and action names to have a character limit
- **Updated** the activity log column to better align with the header
- **Updated** the delete custom field window to match other app designs
- **Updated** the app license expiration to utilize end date plus terms

September 5th, 2025

The latest Mission Control update is now live on Microsoft Appsource! The latest version includes the following changes:

- Added the ability to restore old custom fields
- Added a new column on sales lines called “Vendor” allowing users to choose where their auto generated POs are sent to.
- Added support for the allocation account line type in workflow
- Added a new workflow action allowing users to check an item against its last sold date on orders
- Added support for the integration of Profit Scan fields to Mission Control
- Fixed an issue causing integrated fields to fail on load
- Fixed an issue causing duplicates to show in integrated fields

August 25th, 2025

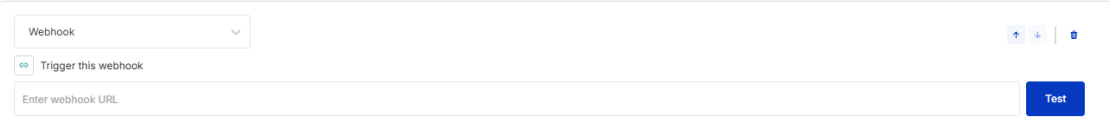
Major Features

The latest Mission Control update is now live in Business Central, delivering a major wave of enhancements designed to boost your profitability and efficiency.

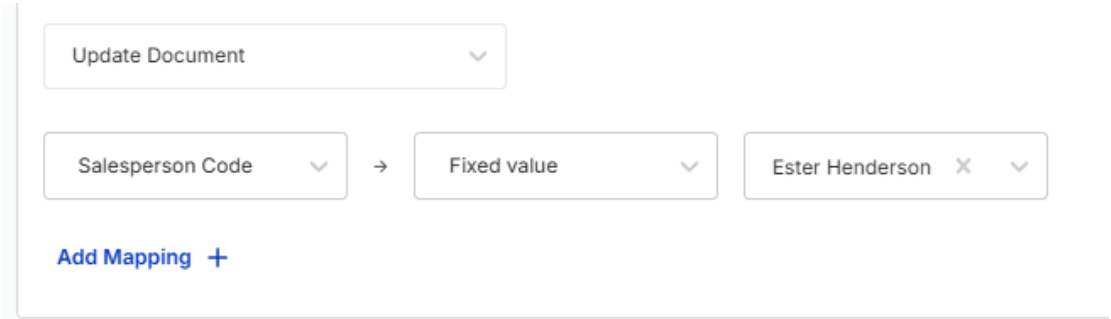
We've expanded our workflow and automation capabilities to give you more control and reduce the time your team spends on manual tasks. Explore the new features below to see how you can start working more efficiently today.

New Workflow Actions:

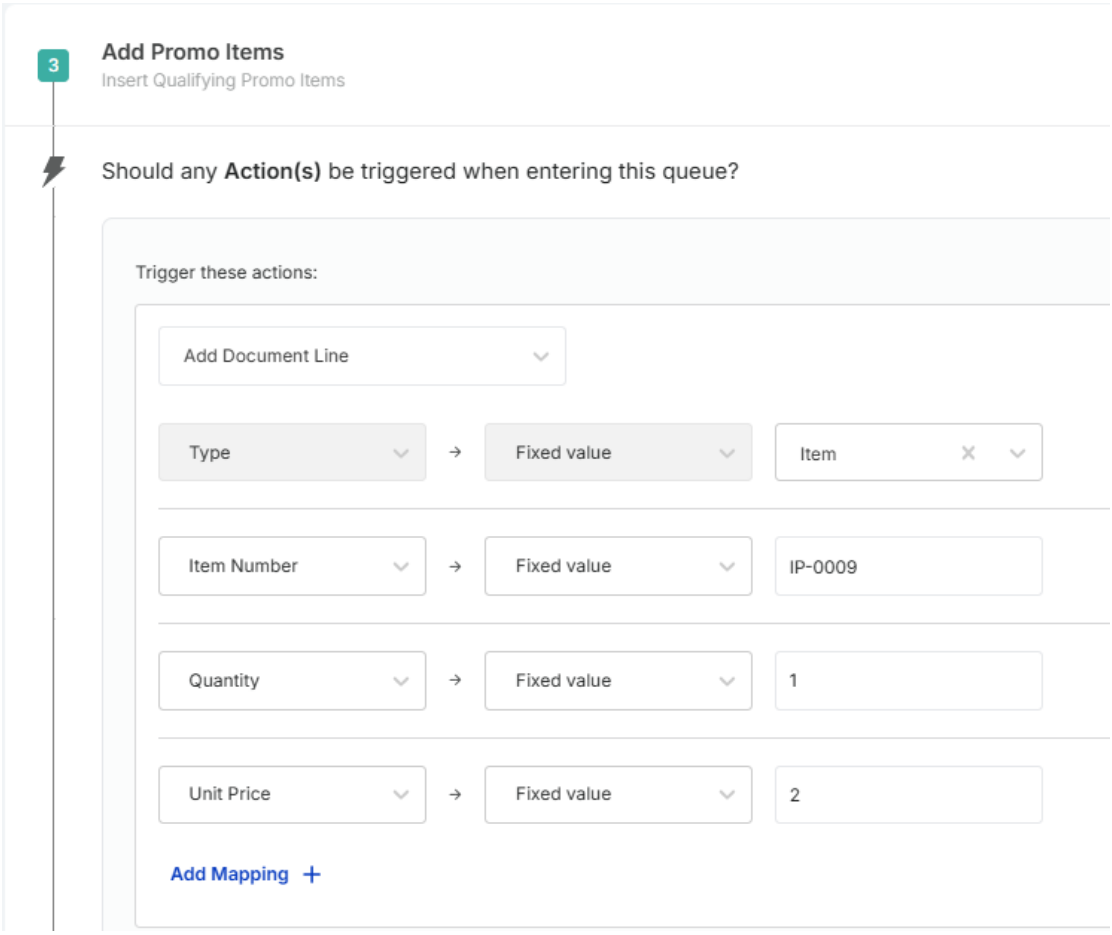
- Trigger Webhook: Allow Mission Control to send outbound webhooks that can trigger all other automation flows on platforms like Power Automate and Zapier!



- Update Document Header: Ensure document headers match business expectations 100% of the time for each order.

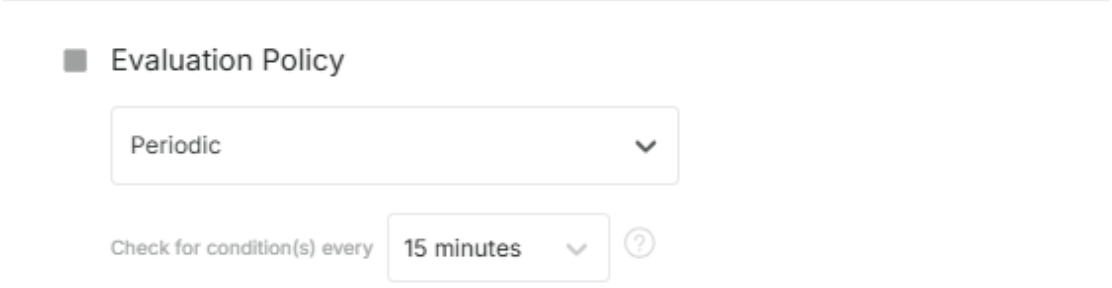


- Add Line Items via Workflow: Ensure relevant items are always included on your orders.



Automatic Actions Enhancements:

With this update, we have moved our Automatic Actions timers to a new area called "Evaluation Policy" containing the below 3 options:



- Periodic Actions: These are the same actions users know and love today! Nothing new here except their location.
- Triggered Auto Actions: Salespad users might call these (+ Queues). To those on Business Central, this auto action allows users to daisy chain workflow submits until the set conditions are false.
- Scheduled Auto Actions: Allows users to set a date/time to run an auto action
- Auto Action Condition Parity: Previously, auto actions were only built against order fields. We have expanded to support all objects normal workflow routing supports.

These features were all added to our core product! To learn more or see these features in action, please contact your Cavallo sales representative to schedule a demo.

This release also contained several smaller updates:

- **Fixed** license check loading states
- **Fixed** an issue with disabling business rules that caused documents to get stuck in workflow

August 7th, 2025

The latest version of Mission Control is now available! See the below release notes for more information regarding this update:

- **Added** a new workflow status for partially picked documents
- **Added** the ability to see the actions on the surface level of the workflow builder
- **Fixed** several UI issues with focus states on custom fields
- **Fixed** several UI issues with focus states in the workflow builder
- **Fixed** an issue that caused activity logs to be hidden based on log length
- **Fixed** an issue that would cause a license check to flash on screen briefly when loading into Mission Control
- **Fixed** an issue that caused the “Has default card” workflow path to be hidden
- **Fixed** an issue with the General Product Posting Group workflow condition where publishing would fail if the condition was selected
- **Revised** our existing banner in Business Central to only show one result when a workflow submit occurs
- **Removed** the “Start” UI from the top of the workflow builder

Coming Soon! Look for the following features in the next release of Mission Control coming at the end of August!

- Webhook Support for Workflow
- Adding Lines Via Workflow
- Updating Documents Via Workflow
- Scheduled Auto Actions
- Triggered Auto Actions

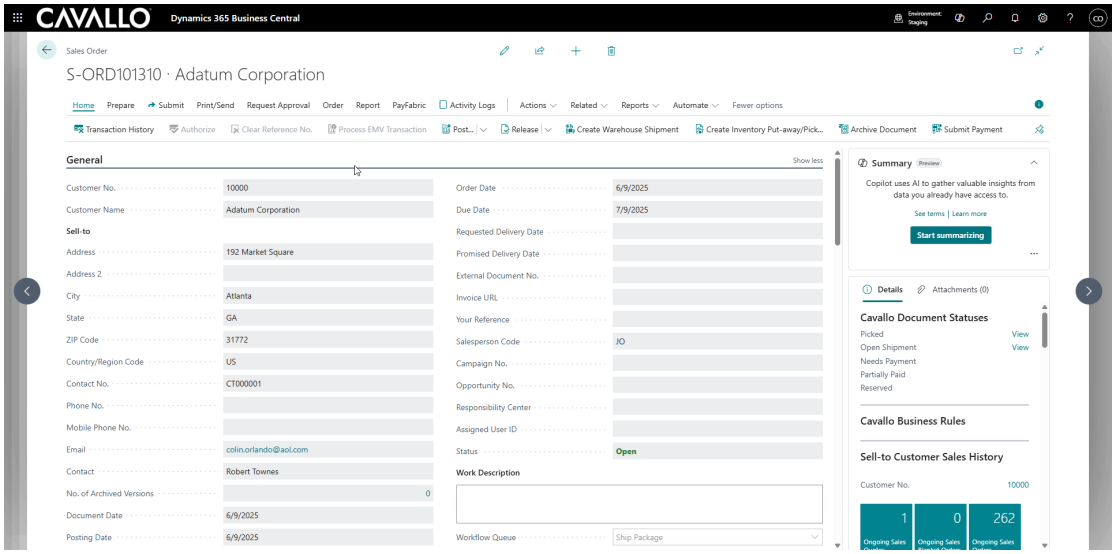
July 8th, 2025

The latest version of Mission Control is now available! See the below release notes for more information regarding this update:

Major Feature Enhancment

Activity Logs in Business Central

Cavallo is excited to share that Activity Logs are now fully available to all users within Business Central. This feature gives teams valuable visibility into sales document activity by clearly showing what actions were taken, when they occurred, and who performed them.



Until now, Activity Logs were only accessible through the Mission Control Dashboard, which limited their reach and usability. With this update, users can now view Activity Logs directly within Business Central by selecting the “Activity Log” option from the Cavallo dropdown menu. Clicking the button opens an embedded view that displays the full Cavallo Activity Log interface within an IFrame, maintaining the same powerful functionality users are familiar with, including filtering, paging, and detailed change tracking.

This update brings greater transparency and operational clarity to your workflow. You can try it today by updating to the latest version of the Cavallo Core application, available now on Microsoft AppSource.

Several smaller updates were also released:

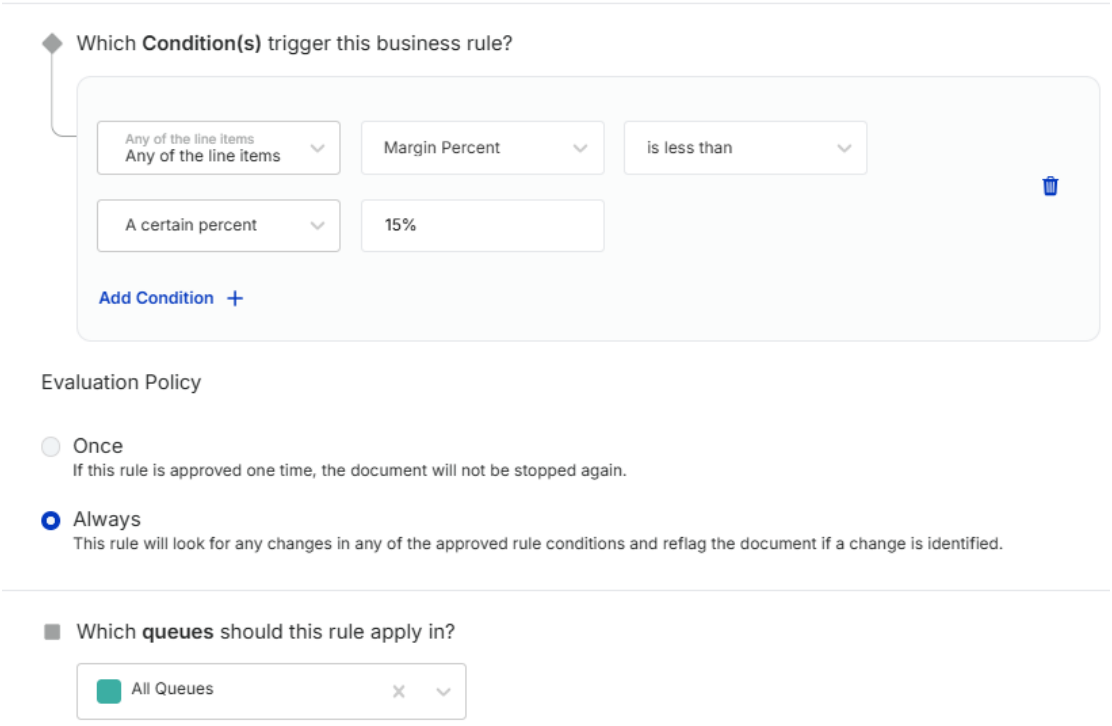
- **Fixed** an issue on the workflow list screen where selecting “All” wouldn’t work correctly.
- **Fixed** several small UI issues on the workflow builder

June 26th, 2025

The latest version of Mission Control is now available! See the below release notes for more information regarding this update:

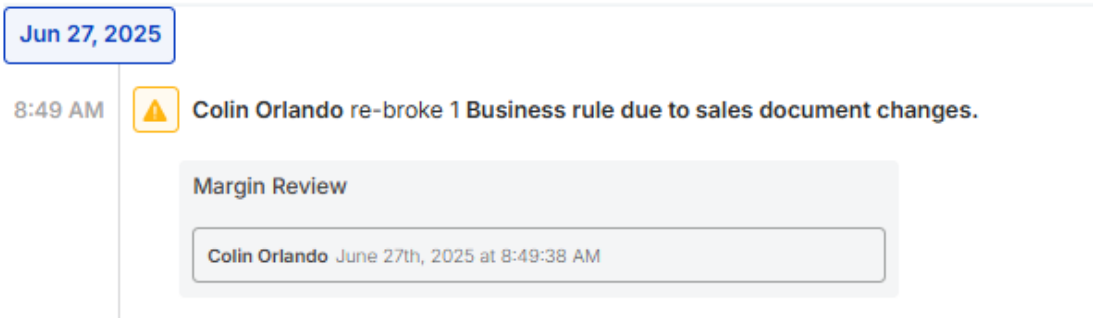
Business Rule Re-Evaluation

Cavallo is thrilled to introduce a major upgrade to Mission Control’s Business Rule Engine: **Configurable Evaluation Policies**, now featuring the new **“Once”** and **“Always”** options. This powerful upgrade ensures continuous process compliance for every document, from system entry to invoicing.



Previously, business rules, once approved, remained active for a document's journey. This often meant creating duplicate rules to re-check fields if document data changed. The new "Always" policy fundamentally changes this. When a rule is set to "Always," Mission Control will continuously monitor the document for changes to the underlying data fields that comprise the rule's criteria. If a relevant field is modified, the system will immediately:

1. Invalidate the prior approval for that specific rule.
2. Flag the business rule again for immediate management re-approval.
3. Create unique activity logs to show this was a rule that was re-broken.



This proactive re-evaluation guarantees documents remain compliant throughout their lifecycle, automatically identifying and escalating any changes that impact an approval rule. The "Once" policy retains the previous behavior, suitable for rules where initial validation is sufficient.

This enhancement delivers:

- Continuous Compliance: Ensures documents adhere to processes from start to finish.
- Reduced Risk: Prevents unapproved changes from progressing through workflows.
- Enhanced Auditability: Provides clear, granular records of all rule evaluations and re-approvals.
- Streamlined Management: Eliminates the need for redundant rules.

By offering both "Once" and "Always" evaluation, Cavallo Mission Control provides robust, dynamic control over your document processing, boosting compliance and operational reliability.

May 29th, 2025

The latest version of Mission Control contains the following changes:

- **Added** automated license checks for automatic actions
- **Fixed** an issue that would require users to enter edit mode to see document updates in Business Central
- **Fixed** an issue with Custom Fields thats will allow editing of currently published business objects
- **Fixed** an issue where fully invoiced documents would error in logs

May 13th, 2025

The latest version of Mission Control contains the following changes:

- **Fixed** an issue that prevented custom fields from publishing correctly
- **Fixed** an issue where broken sales lines would show as blanks in the approval pop up window
- **Fixed** an issue where business rule email templates would appear with broken images
- **Updated** error messaging in Business Central when the purchase and reserve action fails to find a template

April 16th, 2025

The latest version of Mission Control contains the following changes:

- **Fixed** an issue where submitting from a broken business rule would end in a transition failure

April 1st, 2025

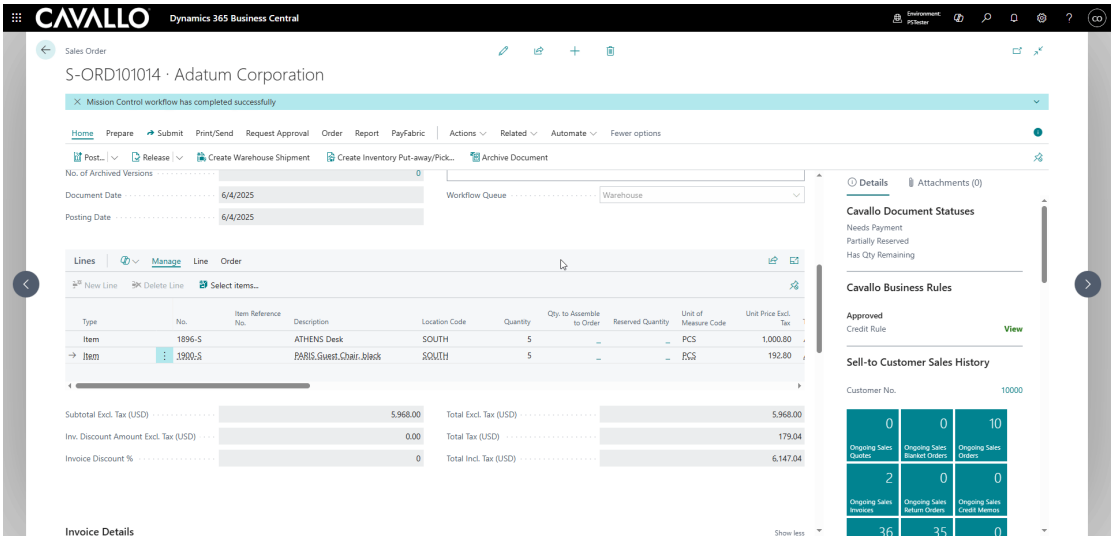
The latest version of Mission Control contains the following changes:

- **Fixed** an issue that caused workflow submits to still timeout from Business Central
- **Fixed** an indexing issue that prevented Activity Logs from loading
- **Added** new handling for Automatic Actions that allow all orders to process regardless of their time

interval
- **Added** a new banner that displays when a manual workflow submit ends in a document becoming fully invoiced

March 21st, 2025

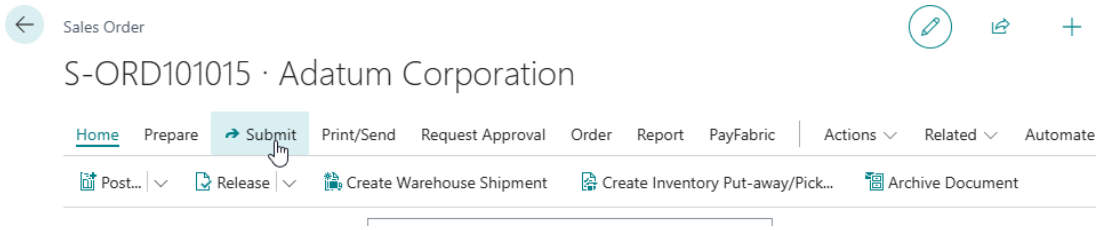
Cavallo is excited to introduce the latest enhancement to Mission Control: Asynchronous Workflow. This upgrade streamlines the order submission process by enabling users to simply click “Submit” within Business Central, leaving the rest to Mission Control.



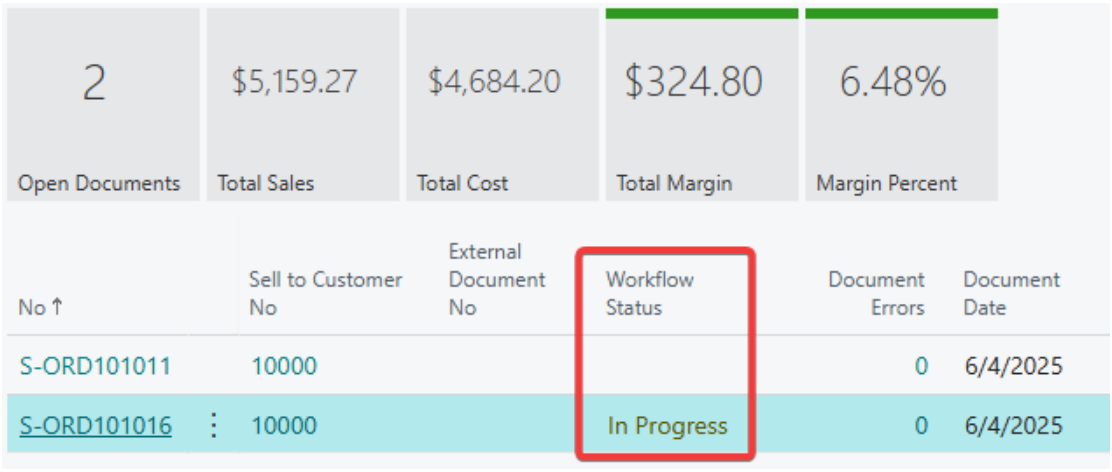
With asynchronous processing, users no longer need to wait for workflows to complete before continuing. Mission Control handles the workflow processing in the background, allowing users to navigate order entry quickly and efficiently. Throughout the process, full visibility into the workflow status of each document is maintained, ensuring transparency without sacrificing speed.

New UI Elements:

- A new processing banner on the top of sales documents when documents are submitted to workflow



- A new column called "Workflow Status" that will indicate "In Progress" when workflow is running against any given sales order.
    - This column can be located in the following areas:
        - Mission Control in BC Dashboards (Specifically the queue drill ins)
        - Sales Orders list in Business Central



A number of smaller bug fixes were also part of this release:

- **Fixed** an issue with the “Notify All” Business Rule setting
- **Fixed** a loading error where Mission Control activity logs would fail to load
- **Fixed** a mapping error with several workflow conditions that would cause users to receive 500 server errors when submitting documents to workflow.
- **Fixed** a bug causing workflow sequencing to show incorrectly within Business Central

February 19th, 2025

- **Fixed** an issue where duplicate automated actions would lock and ulitmately fail to run

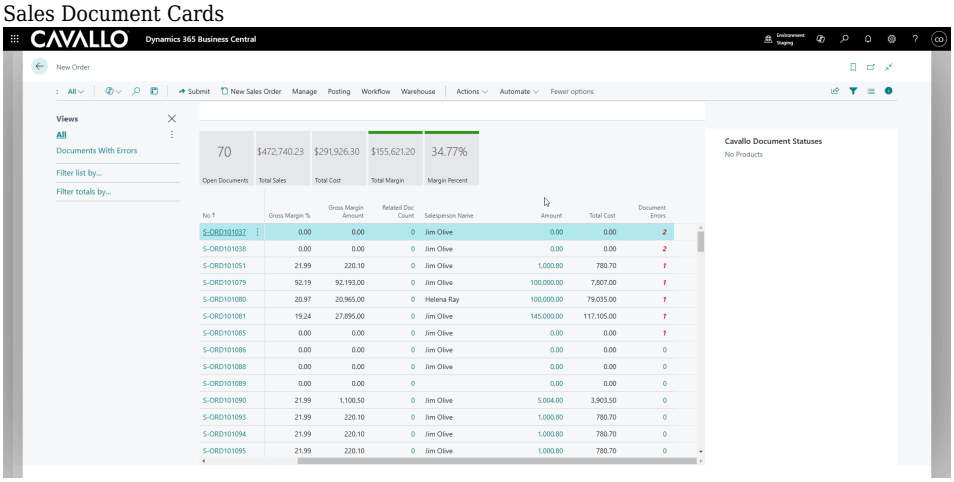
February 5th, 2025

- **Added** a new feature that allows users to understand when a purchase order is expected to arrive.
    - This feature was introduced to the “Related Documents” grid under a column named “Expected Receipt Date”
    - If all receipt dates are the same for any given order, that data will show in the grid.
    - If dates per line are different, there will be a “view” button present to allow users a granular view into the arrival dates per line.

January 8th, 2025

A new version of Mission Control is now available! The Business Central extension for this version of Cavallo can be downloaded from AppSource. The latest version contains the following changes:

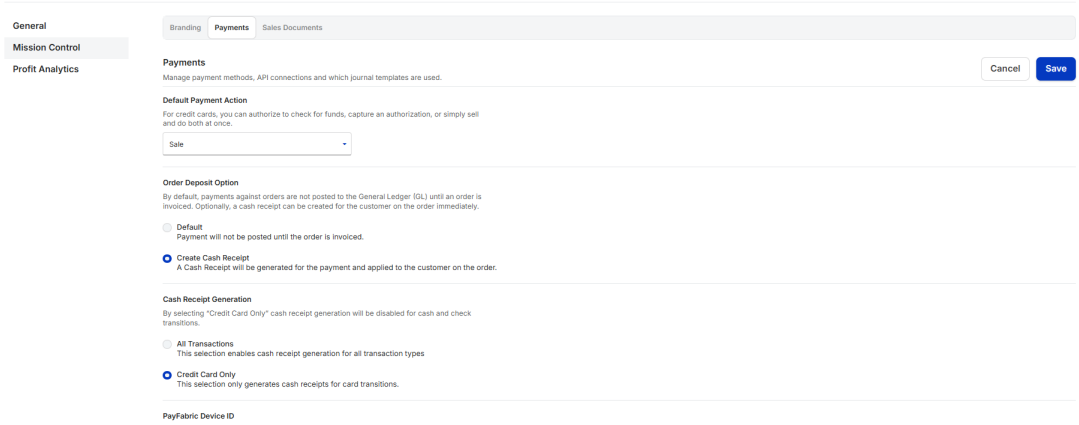
- **Added**: A new feature allowing users to view their Cavallo document errors from within the Business Central UI. This feature can be located in several areas of Business Central including:
    - Mission Control in Business Central dashboards
    - Sales Order List
    - Sales Quote List
    - Sales Document Cards



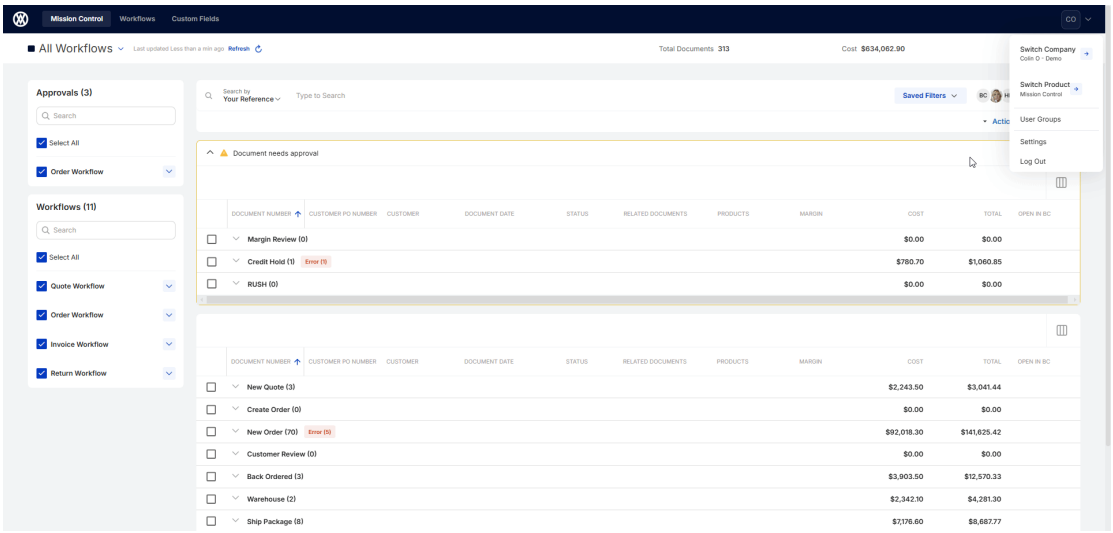
December 11, 2024

The Business Central extension for this version of Cavallo can be downloaded from AppSource. This version includes some small bug changes to the application:

Unified Settings
The latest version of Mission Control introduces a streamlined settings framework, allowing users to manage their experience from a single, unified page. Previously, these settings were accessible only accessible within the Mission Control application. However, with the expansion of Cavallo Order Intelligence to include new products like Profit Analytics, consolidating settings for both applications into a unified framework was a strategic improvement.



This new settings experience can be accessed via the “Settings” dropdown menu within Mission Control or by clicking the cog wheel icon on the Company Select page. Once on the settings page, administrators will have access to all the same Mission Control settings as before the migration. Please note that this experience is only available for users who have migrated off of our allocations framework.



his version includes some smallerchanges to the application:

- Fixed an issue that would prevent custom fields from publishing
- Updated the experience of adding a custom field to use a pop up modal rather than a new window.
- Added the ability to recieve notifications for all business rules

October 30, 2024

The Business Central extension for this version of Cavallo can be downloaded from AppSource. This version includes some small bug changes to the application:

- Resolved an issue that prevented custom fields from working properly with Profit Analytics
- Fixed an issue with duplicate queue naming
- Added a new field to the workflow builder called “Customer Total Amount” which allows business logic against live calculations of customer balance
- Resolved an issue with inviting new users where copy/paste of values into fields would present an error

October 2, 2024

The Business Central extension for this version of Cavallo can be downloaded from AppSource. This version includes some small bug changes to the application:

- Resolved an issue that prevented custom fields from working properly with Profit Analytics
- Fixed an issue with duplicate queue naming
- Added a new field to the workflow builder called “Customer Total Amount” which allows business logic against live calculations of customer balance

September 18, 2024

The Business Central extension for this version of Cavallo can be downloaded from AppSource. This version includes some small bug changes to the application:

- Added the ability to disable business rules
- Relocated access to the below app areas:
- Workflow: Moved from the upper right hand drop down menu to the application header
- User Groups: Relocated from the settings menu to the upper right hand drop down
- Custom Fields: Moved from the upper right hand drop down menu to the application header
- Deprecated the “Updates” feature

September 5, 2024

The Business Central extension for this version of Cavallo can be downloaded from AppSource. This version includes some small bug changes to the application:

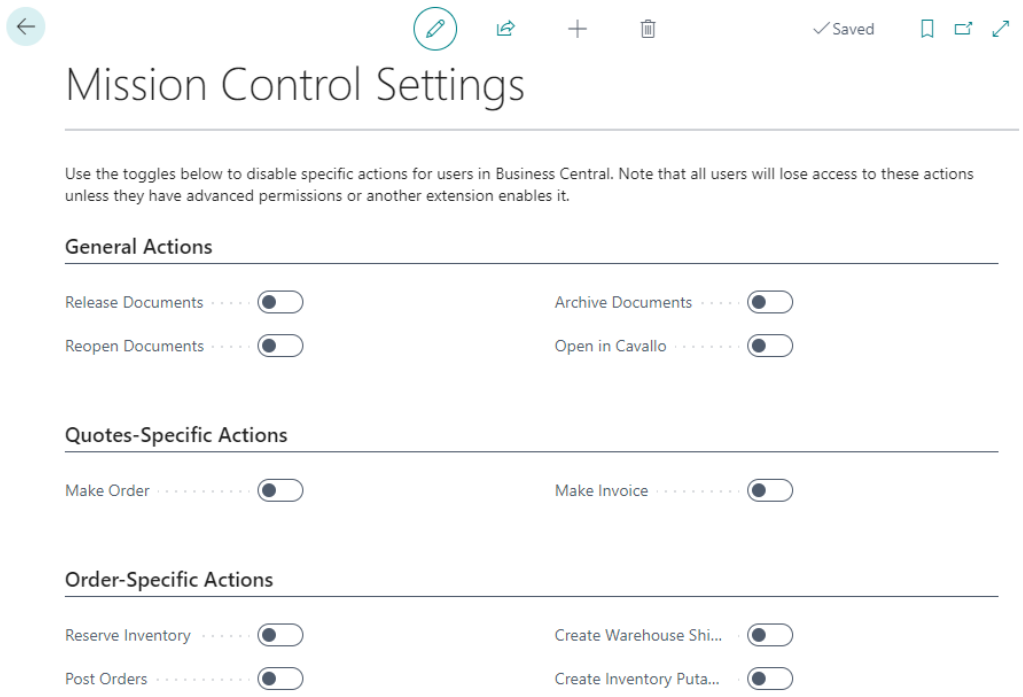
- Resolved an issue with custom fields that changed field IDs when environments are copied
- Fixed an issue that prevented users from adding new queues when editing an existing workflow rule
- Fixed an issue that caused a user to reroute when clicking the filter button in automated action logs
- Corrected an issue within email reporting selection where the user had to click the report a second time

August 21, 2024

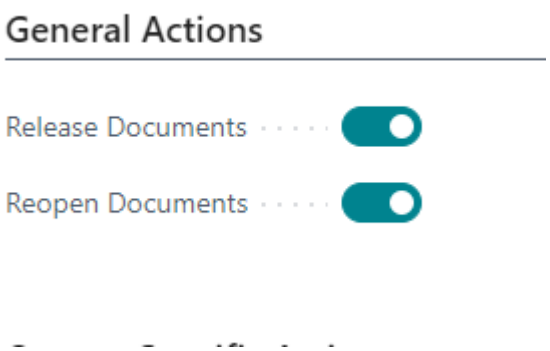
The Business Central extension for this version of Cavallo can be downloaded from AppSource. This version includes our latest new feature within Business Central in addition to several smaller changes:

Disabling Business Central Actions

In the latest update to Mission Control for Business Central, Cavallo has added the capability to restrict specific sales document actions for users. This enhancement allows business leaders to configure Mission Control workflows more effectively, ensuring compliance without requiring manual oversight. As a result, businesses can confidently rely on order takers and sales representatives to adhere to established processes throughout the quote-to-cash cycle.



When any of the above toggles are enabled, the selected actions within Business Central will be hidden from users on sales documents and within any Mission Control screens. However, users with "Super" permissions or "Cavallo All Access" will still be able to view these actions, even if they are disabled. This ensures that admin users retain the ability to manually manage documents as needed.



Allow your workflows and business rules to guide the quote to cash cycle and ensure 100% order accuracy with this new feature. Please visit our support page for more information!

The latest version of Mission Control also includes the following:

- Added a new column to Business Central called “Created At” to track archived document times
- Fixed an issue with “Get Company Integer” that prevented client secrets from setting correctly
- Added new on-save handling for API checks on sales documents
- Fixed an issue that prevented emails from generating on purchase order actions

June 11, 2024

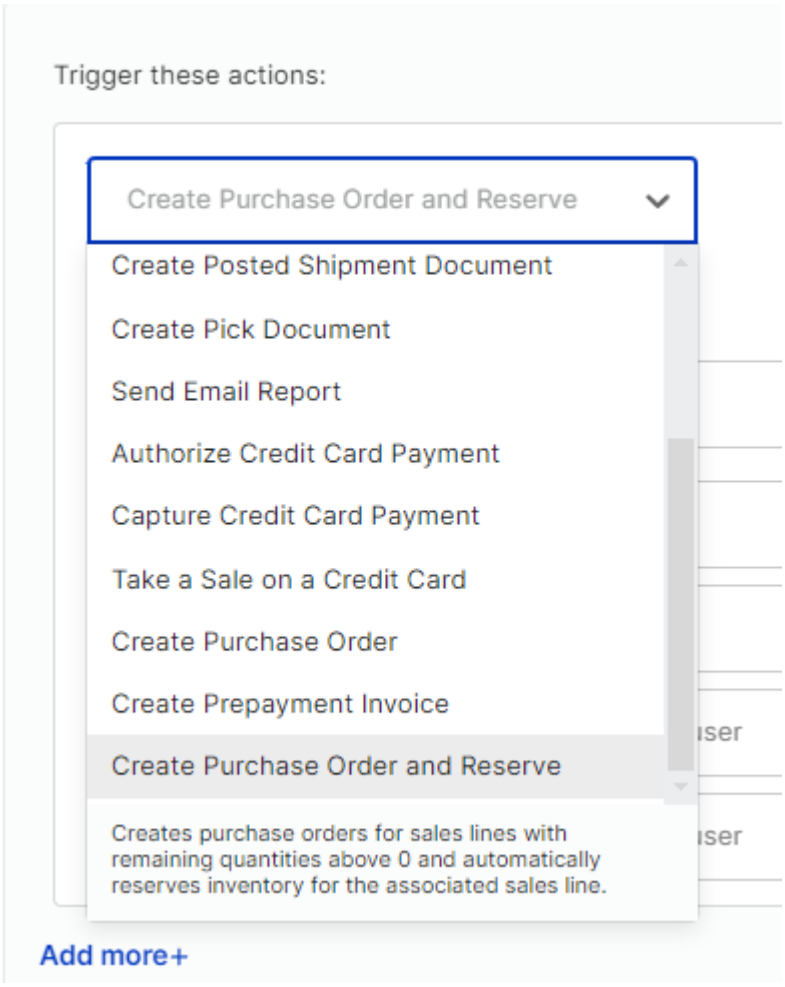
The Business Central extension for this version of Cavallo can be downloaded from AppSource. This version includes some small bug changes to the application:

- Fixed an issue that was causing workflow queue renaming to fail
- Added logic the balance field to ensure it is recalculating every time the document is loaded

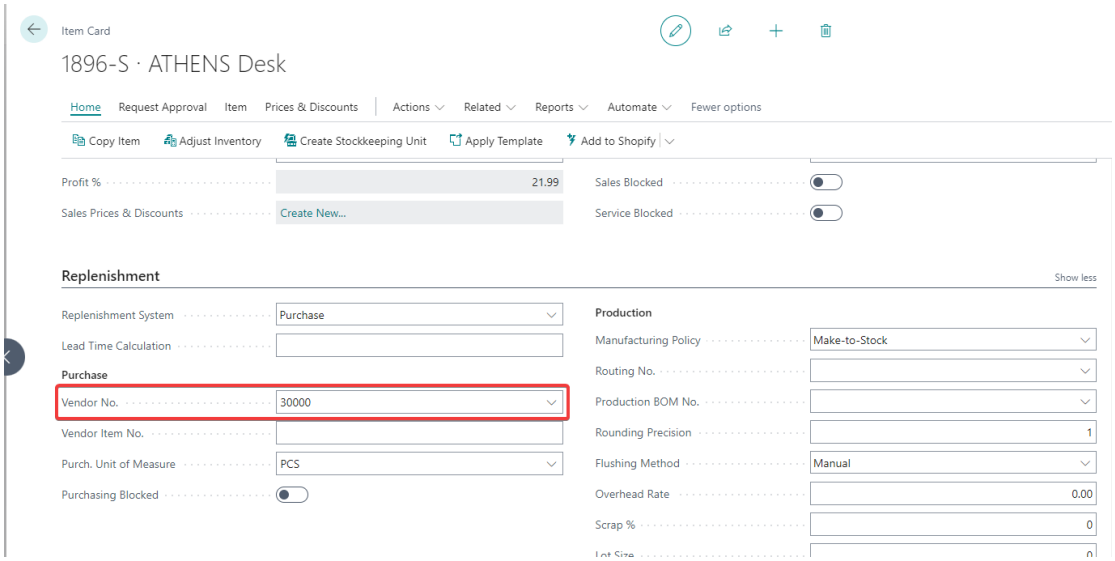
May 30, 2024

The Business Central extension for this version of Cavallo can be downloaded from AppSource. This version includes our latest workflow action, "Purchase and Reserve," along with several minor features and bug fixes.

Purchase and Reserve Via Workflow
In Business Central, users can reserve inventory for sales lines, keeping the inventory on hand accurate. If inventory is lower than demand, CSRs and Buyers typically coordinate to manually create a purchase order for the shortfall and then manually reserve the newly purchased inventory to the sales line. Mission Control's "Purchase and Reserve" action streamlines this process by automatically generating a purchase order for any remaining quantity, while allowing in-stock inventory to continue down the fulfillment chain.



Once this action is configured in the workflow, any item with a default vendor set on the item card in Business Central and with any quantity remaining on the sales lines will be automatically purchased when the action is triggered.



Any user of reservations can take advantage of this new action today and significantly reduce clicks in the order entry and fulfillment process! To get started with this feature today, please navigate to our support page!

This version of Cavallo also includes a number of fixes and updates around the application, including the following:

- Added tool tips for all workflow actions
- Updated the “Date” column on payments to use created on date.
- Fixed an issue allowing double capture of authorizations via the “Capture Complete” flag

May 15, 2024

The Business Central extension for this version of Cavallo can be downloaded from AppSource. This version of Cavallo also includes a number of fixes and updates around the application, including the following

- Resolved an issue that would allow users with lower permissions to manually move a documents workflow queue
- Added a “Has qty remaining” calculated column to display the difference between qty outstanding and reserved qty.
- Added a status to understand when a sales document has qty remaining

May 1, 2024

The Business Central extension for this version of Cavallo can be downloaded from AppSource. This version of Cavallo also includes a number of fixes and updates around the application, including the following:

- Resolved an issue where Mission Control in Business Central dashboard KPIs would show 0 on refresh.
- Resolved an issue with login where a user would receive “No Email”
- Fixed an issue between sales orders and purchase orders when POs are created with workflow

April 17, 2024

The Business Central extension for this version of Cavallo can be downloaded from AppSource, or is available here (Version 1.0.1867.0). Please note that our non-app source releases will soon discontinue, so please follow the instructions here to switch over to our app source app!

This version of Cavallo also includes a number of fixes and updates around the application, including the following:

- Removed the ability to take actions while a document is in an approval queue.
- Resolved an issue that prevented the related document count from updating.
- Added the ability to view custom fields within Mission Control in Business Central

April 3, 2024

The Business Central extension for this version of Cavallo can be downloaded from AppSource, or is available here (Version 1.0.1867.0). Please note that our non-app source releases will soon discontinue, so please follow

the instructions here to switch over to our app source app!

This version of Cavallo also includes a number of fixes and updates around the application, including the following:

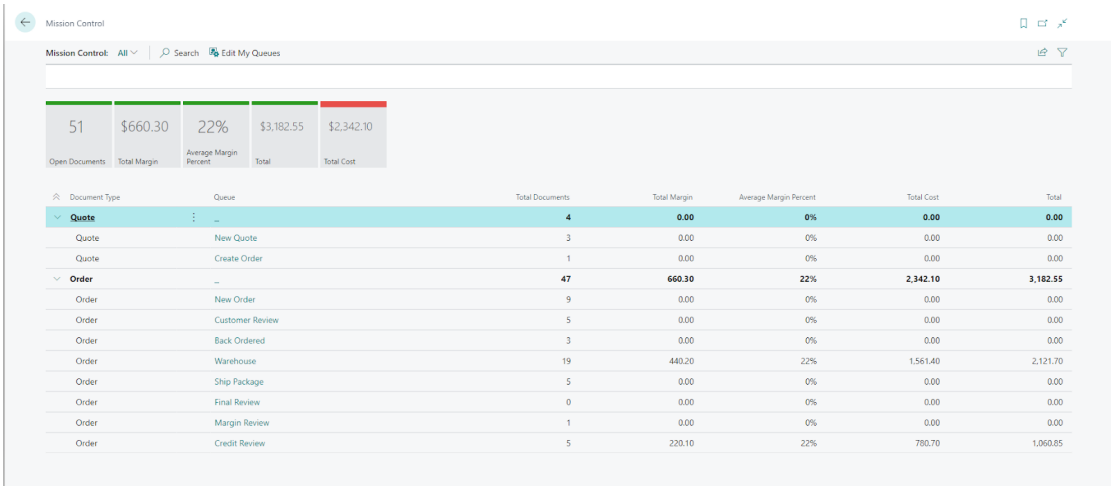
- Added the ability to see document type in the related documents screen within Business Central.
- Fixed an issue that prevented Mission Control KPI tiles from refreshing
- Updated the business rules email template to route users to Business Central
- Resolved an issue that prevented “My Queues” in Mission Control from filtering correctly
- Fixed an issue where Mission Control in Business Central would be hidden under the personalization menu.
- Added the ability to use custom fields within queue drill ins.
- Resolved an issue with the authorization/capture functionality that would result in incorrect balance remaining.
- Fixed an issue that would prevent allocations from occurring

March 21, 2024

The Business Central extension for this version of Cavallo can be downloaded from AppSource, or is available here (Version 1.0.1867.0). Please note that our non-app source releases will soon discontinue, so please follow the instructions here to switch over to our app source app!

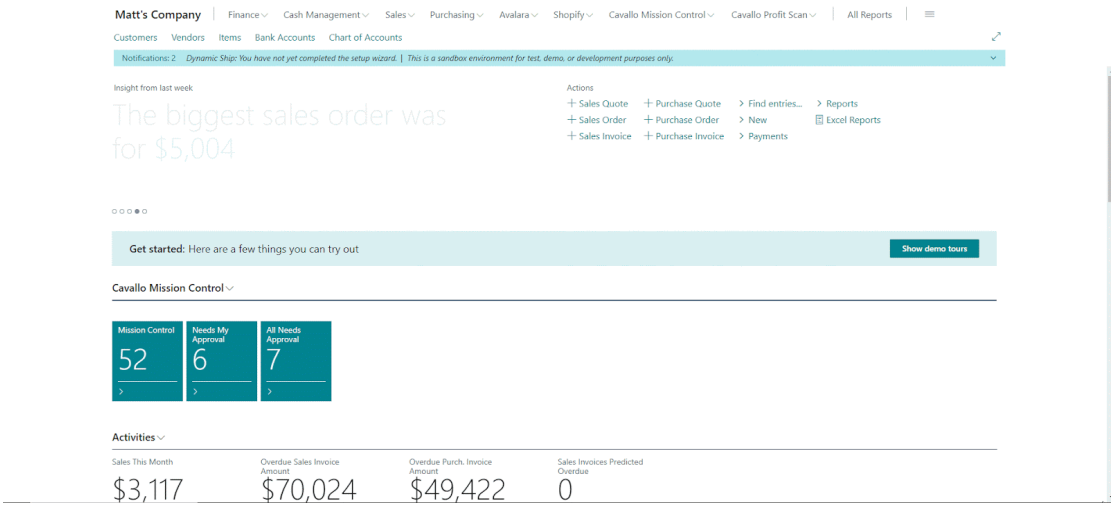
Mission Control In Business Central

In the latest release, we're excited to announce expanded integration capabilities with the Mission Control Dashboard directly within Business Central! With this update, users can seamlessly access the powerful features of Cavallo Mission Control without leaving the ERP environment. Now, Customer Service Representatives (CSRs) and Sales Representatives can stay focused within the Business Central platform while harnessing the full suite of automations and enhanced workflow visibility provided by Mission Control.



Document Type	Queue	Total Documents	Total Margin	Average Margin Percent	Total Cost	Total
Quote	_	**4**	**0.00**	**0%**	**0.00**	**0.00**
Quote	New Quote	3	0.00	0%	0.00	0.00
Quote	Create Order	1	0.00	0%	0.00	0.00
Order	_	**47**	**660.30**	**22%**	**2,342.10**	**3,182.55**
Order	New Order	9	0.00	0%	0.00	0.00
Order	Customer Review	5	0.00	0%	0.00	0.00
Order	Back Ordered	3	0.00	0%	0.00	0.00
Order	Warehouse	19	440.20	22%	1,561.40	2,121.70
Order	Ship Package	5	0.00	0%	0.00	0.00
Order	Final Review	0	0.00	0%	0.00	0.00
Order	Margin Review	1	0.00	0%	0.00	0.00
Order	Credit Review	5	220.10	22%	780.70	1,060.85

Configuring workflows in Cavallo Mission Control triggers automatic integration with multiple role center views in Business Central via the Cavallo API connection. This enables users to seamlessly access their workflows in their entirety. They can set “My Queues” filters to focus solely on their designated tasks and dive into each queue to examine document-level details such as document margin, statuses and related documents.



This version of Cavallo also includes a number of fixes and updates around the application, including the following:

- Added the ability to view related documents and gross margin on document archives within Business Central
- Fixed an issue with the workflow builder that would prevent all queues from displaying on the left side of the screen
- Added the ability to disable automated actions
- Added the ability to route orders by customer dimension
- Resolved an issue where allocations prevented workflow submits.
- Fixed an issue preventing API tokens from fetching and storing for 30 days.

March 6, 2024

The Business Central extension for this version of Cavallo can be downloaded from AppSource, or is available here (Version 1.0.1768.0). Please note that our non-app source releases will soon discontinue, so please follow the instructions here to switch over to our app source app!

This version of Cavallo includes a number of fixes and updates around the application, including the following:

- Fixed an issue that would prevent custom fields from sorting properly
- Resolved an issue with customer creation that would prevent reports from printing
- Added more in depth error messaging to documents that failed to submit
- Resolved an issue that prevented workflow queue from changing in Business Central
- Resolved an issue that would cause slowness when take prepayments
- Fixed an issue that would prevent automations actions on quotes from firing.

February 21, 2024

The Business Central extension for this version of Cavallo can be downloaded from AppSource, or is available here (Version 1.0.1768.0). Please note that our non-app source releases will soon discontinue, so please follow the instructions here to switch over to our app source app!

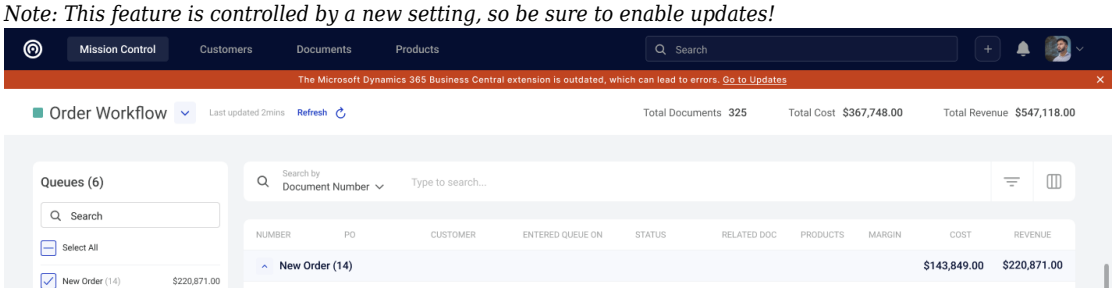
This version of Cavallo includes a number of fixes and updates around the application, including the following:

- Fixed an issue that caused the Qty On Hand to recalculate often
- Resolved an issue causing the sales lines to recalculate often
- Added the ability to view the Work Description field from the Mission Control Dashboard.
- Fixed an issue with the Cavallo factbox in Business Central that would require authentication too frequently
- Resolved an issue with Payfabric cash receipt generation that would insert the wrong due date
- Fixed an issue where workflows with no queues could still publish
- Resolved an issue with sorting by a custom field in approval queues
- Fixed an issue that would prevent specific automated actions from running

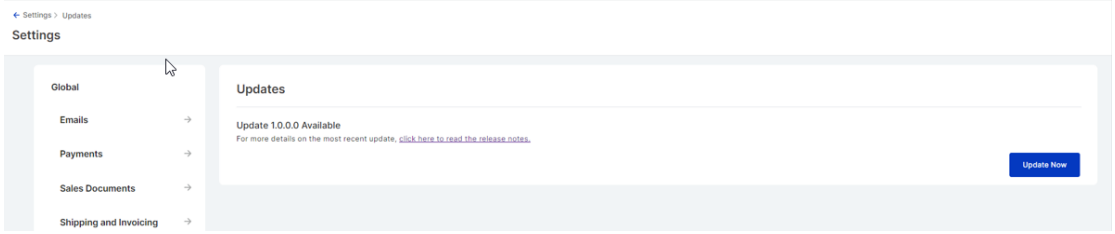
February 7, 2024

The Business Central extension for this version of Cavallo can be downloaded from AppSource, or is available here (Version 1.0.1742.0). Please note that our non-app source releases will soon discontinue, so please follow the instructions here to switch over to our app source app!

In-App Updates
In the latest version of Cavallo, users now have the ability to understand when their extension is out of date. This feature aims to allow users to take control of their update schedule and ensure the latest version is installed all without leaving the Cavallo application!
Note: This feature is controlled by a new setting, so be sure to enable updates!



The update banner will now appear for all users whenever there is a new version of the extension available to be installed. Clicking the “Go to Updates” link will bring an admin user directly to the correct page within Cavallo to take the action required to update. Once initiated, users will be unable to process orders until the update is complete, so please ensure that updates are done at a time that won’t interfere with any business processes.



For more information regarding how to use in app updates, please refer to our support page!

This version of Cavallo also includes a number of fixes and updates around the application, including the following:

- Added the ability to route by the work description field
- Added gross margin percentage and gross margin amount fields to the sales line grid in Business Central
- Resolved an issue that prevented invoicing charge lines
- Resolved an issue that would prevent the broken business rules column from populating correctly in Business Central

January 25, 2024

The Business Central extension for this version of Cavallo can be downloaded from AppSource, or is available here (Version 1.0.1690.0). Please note that our non-app source releases will soon discontinue, so please follow the instructions here to switch over to our app source app!

This version of Cavallo includes a number of fixes and updates around the application, including the following:

- Fixed an issue that work preventing quote entry
- Added the ability to disable cash receipt generation for cash and check payments
- Resolved an issue that prevented real time business rule updates in the Business Rules fact box.
- Resolved several inconsistencies with icon styling
- Fixed an issue preventing the screen from refreshing in order entry when breaking a business rule
- Adding paging to order entry to prevent lagging while entering orders
- Fixed an issue with workflow that prevented credit card auths from capturing.
- Fixed an issue that was preventing the Cavallo permissions from being respected in Business Central
- Resolved an issue preventing emails from sending via workflow
- Fixed the open in BC button
- Resolved an issue with warehouse pick/ship documents

January 10, 2024

The Business Central extension for this version of Cavallo can be downloaded from AppSource, or is available here (Version 1.0.1664.0). Please note that our non-app source releases will soon discontinue, so please follow the instructions here to switch over to our app source app!

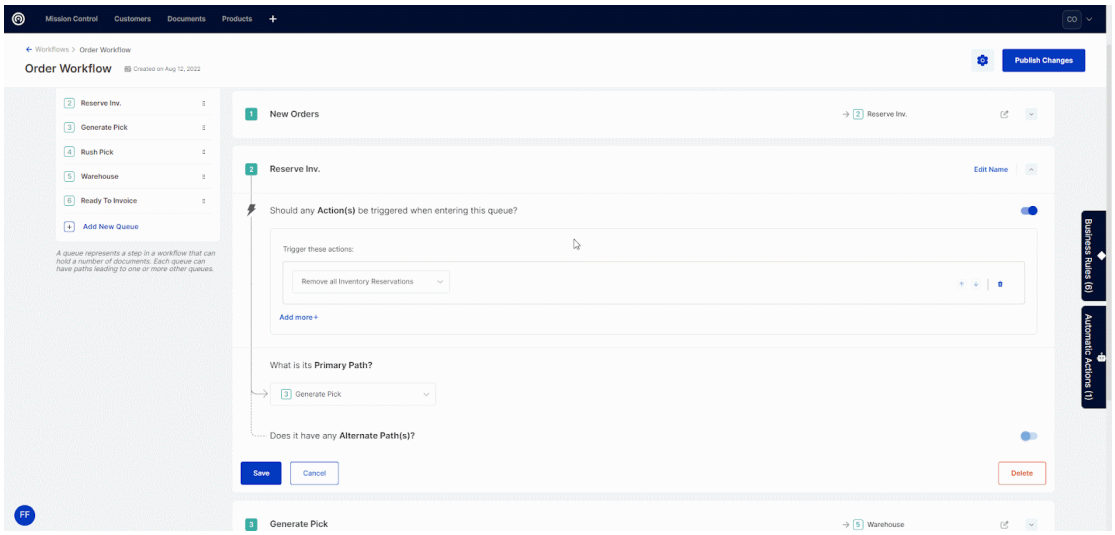
This minor release resolves an issue that could prevent picking a document if there was a negative quantity available for a line.

December 15, 2023

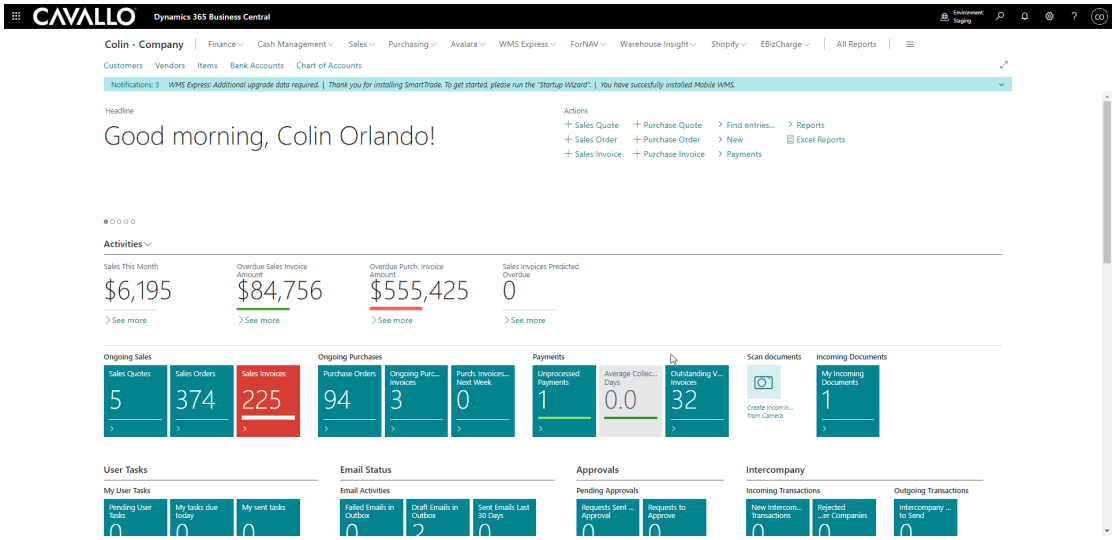
The Business Central extension for this version of Cavallo can be downloaded from AppSource, or is available here (Version 1.0.1654.0). Please note that our non-app source releases will soon discontinue, so please follow the instructions here to switch over to our app source app!

Workflow Reservation Support

In the latest version of Cavallo, users can now customize their workflows to integrate seamlessly with Business Central reservations. This improvement simplifies the manual task of reserving inventory, allowing users to minimize clicks and dedicate more time to achieving margin goals and ensuring customer satisfaction. Users can now efficiently route orders based on reservation status, automatically reserve inventory, and enforce business rules to prevent early inventory reservations in the process.



Any reservation made by the Cavallo workflow engine will be reflected in the Business Central grids as well providing for full visibility. Reservations has also been fitted to work with Cavallo's backordering so that in the event that not enough inventory is available to reserve, the backorder column will automatically be set with the remaining quantity and the backorder status applied to further route on.



For more information regarding how to use reservation with workflow, please refer to our support page!

Other Updates

This version of Cavallo includes a number of fixes and updates around the application, including the following:

- Created a new reset to default option in the column picker
- Resolved an issue that would prevent users from opening documents in Business Central from Cavallo

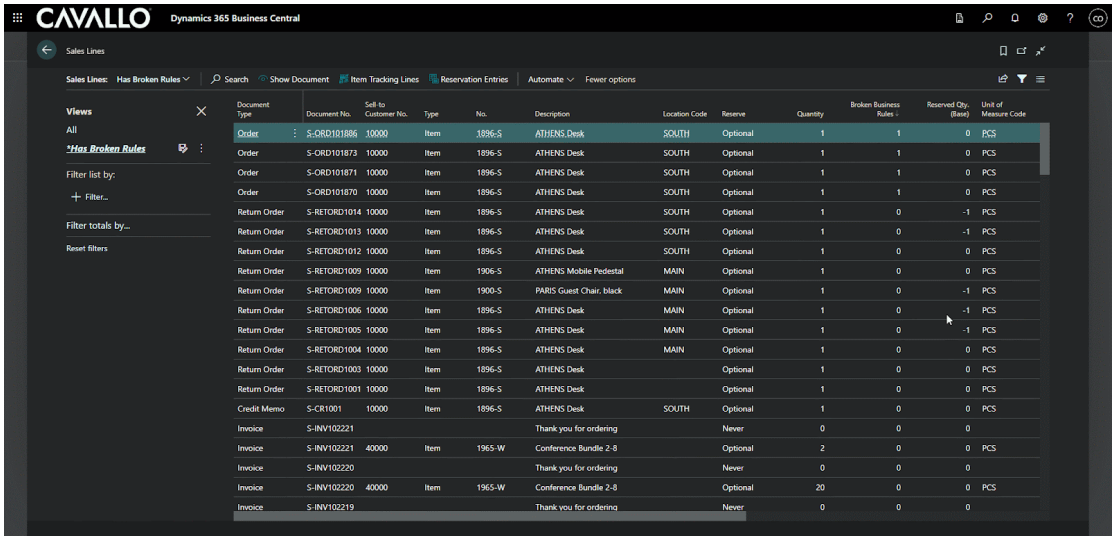
- Updated sales line business rules functionality in Business Central to show users more information in the Cavallo factbox
- Fixed an issue with the business rules setup screen where the dropdown menus would default to being open
- Resolved an error that would prevent a new workflow queue name from updating correctly
- Fixed an issue that prevented sub reports from being selected in all email windows
- Corrected an error with the workflow builder that would prevent specific margin percentage rules from saving
- Resolved an issue where new top level workflow queues would cause workflow automation issues
- Fixed an issue that prevented the inventory drawer from opening on sales documents

November 30, 2023

The Business Central extension for this version of Cavallo can be downloaded from AppSource, or is available here (Version 1.0.1573.0). Please note that our non-app source releases will soon discontinue, so please follow the instructions here to switch over to our app source app!

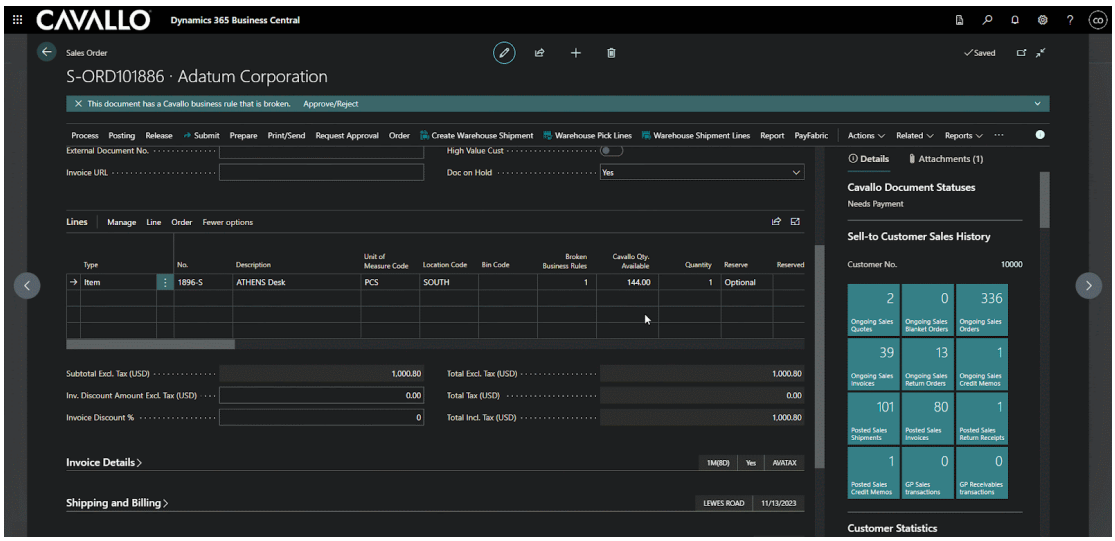
Sales Line Item Business Rules

In the most recent update of Cavallo, users can more easily identify the sales line that triggered a specific business rule violation. This functionality allows business leaders to streamline the process of identifying problem orders, significantly reducing the time required to address issues those orders may have. This can be achieved through the use of the new "Broken Business Rules" column and by filtering on that column.



Document Type	Document No.	Sell-to Customer No.	Type	No.	Description	Location Code	Reserve	Quantity	Broken Business Rules	Reserved Qty. (Base)	Unit of Measure Code
Order	S-ORD101886	10000	Item	1896-S	ATHENS Desk	SOUTH	Optional	1	1	0	PCS
Order	S-ORD101873	10000	Item	1896-S	ATHENS Desk	SOUTH	Optional	1	1	0	PCS
Order	S-ORD101871	10000	Item	1896-S	ATHENS Desk	SOUTH	Optional	1	1	0	PCS
Order	S-ORD101870	10000	Item	1896-S	ATHENS Desk	SOUTH	Optional	1	1	0	PCS
Return Order	S-RETORD1014	10000	Item	1896-S	ATHENS Desk	SOUTH	Optional	1	0	-1	PCS
Return Order	S-RETORD1013	10000	Item	1896-S	ATHENS Desk	SOUTH	Optional	1	0	-1	PCS
Return Order	S-RETORD1012	10000	Item	1896-S	ATHENS Desk	SOUTH	Optional	1	0	0	PCS
Return Order	S-RETORD1009	10000	Item	1906-S	ATHENS Mobile Pedestal	MAIN	Optional	1	0	0	PCS
Return Order	S-RETORD1009	10000	Item	1900-S	PARIS Guest Chair, black	MAIN	Optional	1	0	-1	PCS
Return Order	S-RETORD1006	10000	Item	1896-S	ATHENS Desk	MAIN	Optional	1	0	-1	PCS
Return Order	S-RETORD1005	10000	Item	1896-S	ATHENS Desk	MAIN	Optional	1	0	-1	PCS
Return Order	S-RETORD1004	10000	Item	1896-S	ATHENS Desk	MAIN	Optional	1	0	0	PCS
Return Order	S-RETORD1003	10000	Item	1896-S	ATHENS Desk		Optional	1	0	0	PCS
Return Order	S-RETORD1001	10000	Item	1896-S	ATHENS Desk		Optional	1	0	0	PCS
Credit Memo	S-CR1001	10000	Item	1896-S	ATHENS Desk	SOUTH	Optional	1	0	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	2	0	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	20	0	0	PCS
Invoice	S-INV102219				Thank you for ordering		Never	0	0	0	

This new column is accessible both in the sales line search and at the line level within sales orders. As rules are broken, the corresponding line will increment and exhibit the count of broken rules. Clicking on this count will open the approvals window, providing users with a comprehensive view of the specific line that is broken and the underlying business rule that corresponds. This functionality enhances the transparency and efficiency of managing broken rules within Business Central.



For more information regarding how to use this new business rule visibility, please refer to the support article below!

https://cavallo.kayako.com/article/2335-how-to-use-cavallo-workflow-in-business-central

Other Updates

This version of Cavallo includes a number of fixes and updates around the application, including the following:

- Fixed an issue with cash receipt creation that could cause duplicates on invoice
- Fixed an issue that prevented sales lines from displaying the correct currency
- Resolved an error with custom fields that prevented any 3rd party fields from integrating with Cavallo
- Fixed an issue that prevented the cursor from displaying on the last line added
- Fixed an issue that caused the filters dropdown to be moved towards the top fo the scree
- Updated the business rules filter in business central to allow users to quickly filter all the documents with broken business rules on the sales line
- Resolved an error with automated actions that would leave orders in open state after invoicing

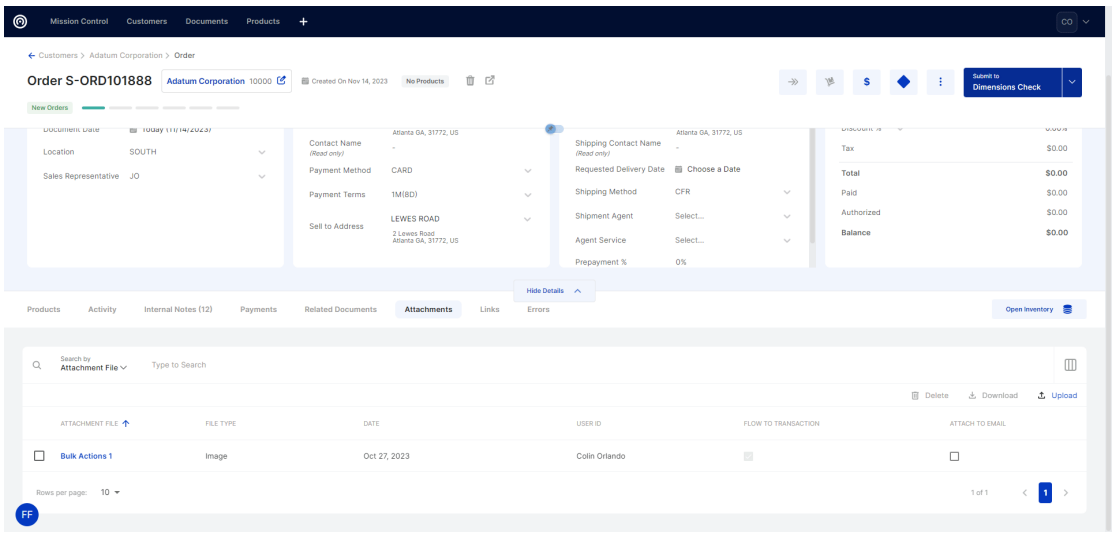
November 15, 2023

The Business Central extension for this version of Cavallo can be downloaded from AppSource, or is available here (Version 1.0.1529.0). Please note that our non-app source releases will soon discontinue, so please follow the instructions here to switch over to our app source app!

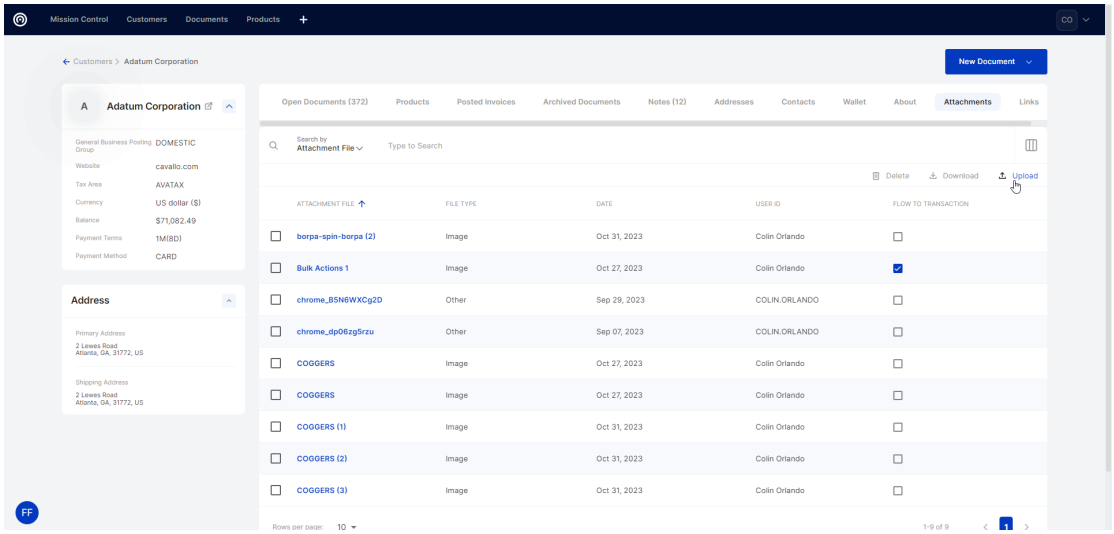
If you use PayFabric in Business Central, and make use of our App Source version of our app, download and install this version of the PayFabric Cavallo extension (Version 1.0.1.0) found here. If you use PayFabric with the non App Source version of Cavallo, load this version of the PayFabric Cavallo extension (Version 1.0.0.26) here.

Make sure to load these versions of the extension in your environment to use these new features! Instructions for installing the latest version of the extension can be found here.

Attachments
The latest version of Cavallo has added support for Attachments or links available throughout the application! This new functionality allows users to conveniently manage and access essential supporting documentation across various levels, including customers, products, and sales documents. With attachments now accessible on both sales documents and sales line items, users can swiftly add documents to ensure the accuracy of their orders.



Users can easily upload attachments or links at the customer and product level, ensuring that these attachments automatically integrate with their sales transactions, reducing the need for duplicate efforts. Furthermore, users have the flexibility to selectively attach specific files to emails, whether through manual action or workflow automation, enhancing the overall functionality and productivity of operations.



For more information regarding how to use attachments, please refer to the documentation below!

[Attachments in Cavallo]

Other Updates

This version of Cavallo includes a number of fixes and updates around the application, including the following:

- Added the ability to search for filters when building a filter set
- Resolved an issue with saving new phone numbers on customer contacts
- Fixed an issue that prevented the payments field in the document header from updating
- Resolved an issue that would allow documents in approval queues to be submitted normally
- Fixed an issue that prevented document errors from recording in the activity log
- Updated the custom fields integration screen to have an improved user interface

November 1, 2023

The Business Central extension for this version of Cavallo can be downloaded from AppSource, or is available here (Version 1.0.1430.0). Please note that our non-app source releases will soon discontinue, so please follow the instructions here to switch over to our app source app!

If you use PayFabric in Business Central, and make use of our App Source version of our app, download and install this version of the PayFabric Cavallo extension (Version 1.0.1.0) found here. If you use PayFabric with the non App Source version of Cavallo, load this version of the PayFabric Cavallo extension (Version 1.0.0.26) here.

Make sure to load these versions of the extension in your environment to use these new features! Instructions

for installing the latest version of the extension can be found here.

This version of Cavallo includes a number of fixes and updates around the application, including the following:

- Resolved an issue where the transfer to order bulk action was visible on incorrect screens
- Fixed an issue where users would be redirected when editing customer wallet
- Fixed an issue where the date selector would close out when attempting to create filters with a date parameter
- Resolved a securities issue where select bulk actions would remain visible for users who didn't have proper permissions.
- Fixed an issue with searching where no results where shown past page 1
- Added the ability to view credit memos in document lists
- Updated copy on the related documents tab to better match Business Central's document names.
- Resolved an issue on customer creation that would prevent a new customer from saving
- Resolved an issue that prevented the search by field from clearing
- Fixed an issue preventing custom fields with longer text from importing
- Resolved an error where credit card payments wouldn't show in the paid field on the document header

October 19, 2023

The Business Central extension for this version of Cavallo can be downloaded from AppSource, or is available here (Version 1.0.1383.0). Please note that our non-app source releases will soon discontinue, so please follow the instructions here to switch over to our app source app!

If you use PayFabric in Business Central, and make use of our App Source version of our app, download and install this version of the PayFabric Cavallo extension (Version 1.0.1.0) found here. If you use PayFabric with the non App Source version of Cavallo, load this version of the PayFabric Cavallo extension (Version 1.0.0.26) here.

Make sure to load these versions of the extension in your environment to use these new features! Instructions for installing the latest version of the extension can be found here.

This version of Cavallo includes a number of fixes and updates around the application, including the following:

- Fixed an issue where pick documents were being generated even when the available inventory for that item was zero.
- Corrected an issue where certain bulk actions were available when no documents were selected.
- Fixed an issue where automatic actions were not being properly applied after a bulk action was run on a document.
- Improved performance of loading data from Business Central in certain circumstances.
- Resolved an issue when creating pick documents when the Unit of Measure for a picked item is less than one.
- Corrected a margin calculation issue when an invoice is posted from a document that has a discount.

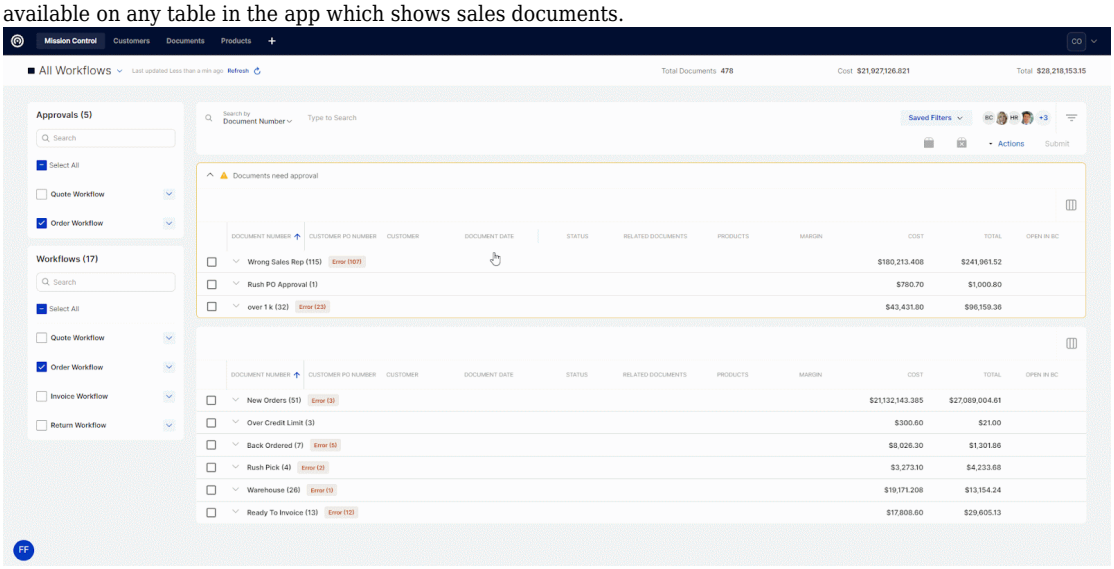
October 5, 2023

The Business Central extension for this version of Cavallo can be downloaded from AppSource, or is available here (Version 1.0.1351.0). Please note that our non-app source releases will soon discontinue, so please follow the instructions here to switch over to our app source app!

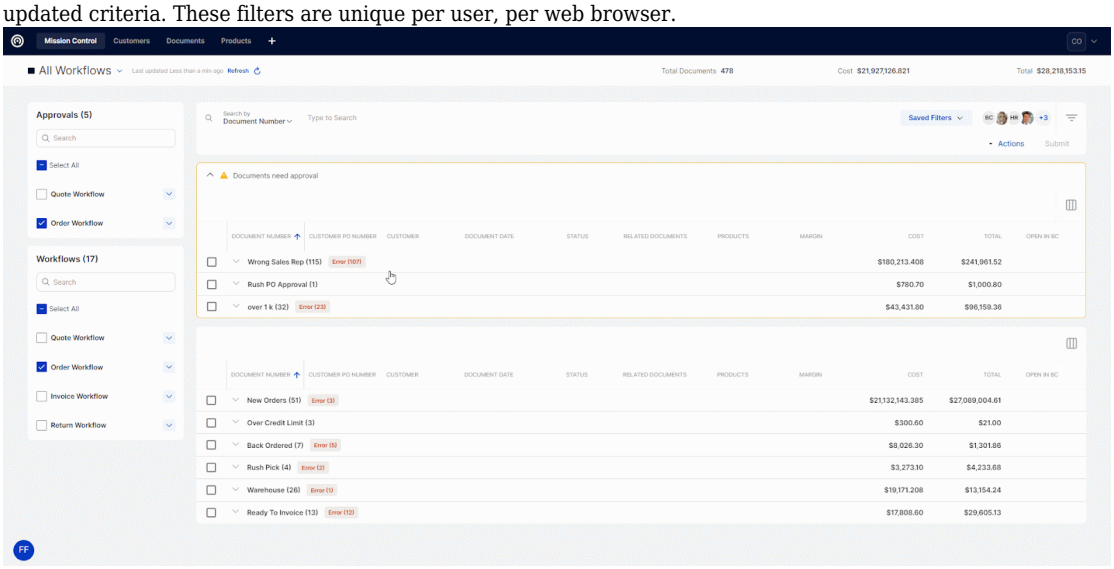
If you use PayFabric in Business Central, and make use of our App Source version of our app, download and install this version of the PayFabric Cavallo extension (Version 1.0.1.0) found here. If you use PayFabric with the non App Source version of Cavallo, load this version of the PayFabric Cavallo extension (Version 1.0.0.26) here.

Make sure to load these versions of the extension in your environment to use these new features! Instructions for installing the latest version of the extension can be found here.

Saved Filters
The latest version of Cavallo has added new filtering capabilities throughout the application! This new filtering functionality allows users to get to the data they need, when and where they need it. These filters are now available on any table in the app which shows sales documents.



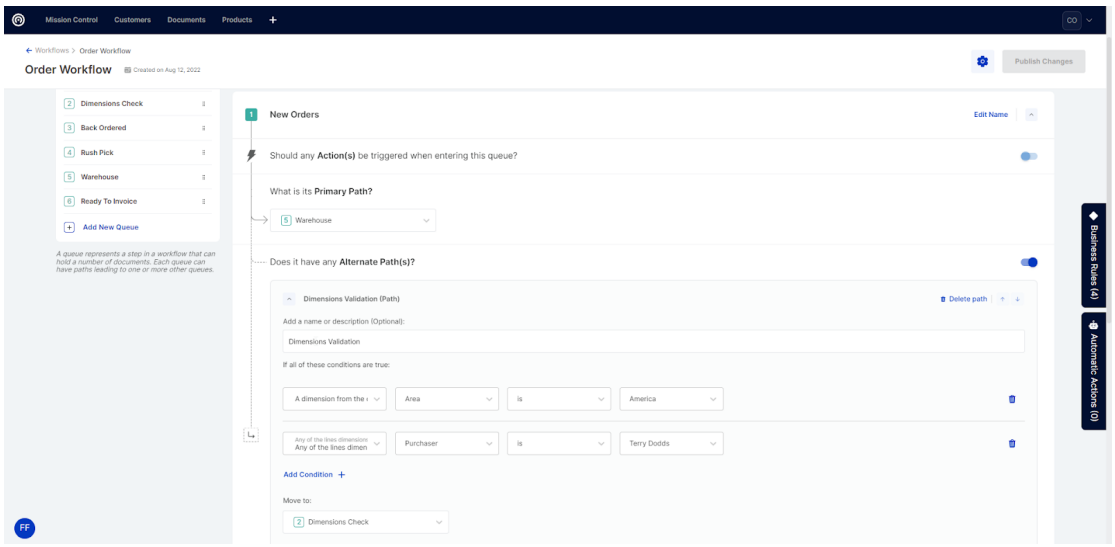
As seen below, users can now save and reuse filters. When a filter set is saved with a unique name, it becomes accessible from the "Saved Filters" dropdown menu, simplifying the process of reusing filters. Users can make changes to a saved filter by selecting it from the dropdown, allowing for the creation of new filter sets with updated criteria. These filters are unique per user, per web browser.



For more information regarding how to use saved filters, please refer to the support article below!

Filtering Data in Tables

Routing by Dimensions
Cavallo has broadened its workflow capabilities to support dimensions from Business Central. Dimensions play a pivotal role in Business Central's accounting and order processing procedures, so it is very valuable to route orders based on the dimensions associated with it or its lines.



Conditions based on dimensions have also been added to Business Rules. Building rules based on dimensions is particularly powerful, as it allows conditions and criteria to be built which allow catching documents which break rules based on which group or type of products are being sold.

Other Updates

This version of Cavallo includes a number of fixes and updates around the application, including the following:

- Resolved an issue with generating pick documents including items with small decimal units of measure.
- Fixed an issue that would cause extra loading time for documents in certain circumstances
- Fixed an issue that would prevent users from loading more than 10 ship-to addresses
- Resolved an issue that would prevent the sorting of custom fields columns
- Fixed an issue that would cause the bulk submit to be available with nothing selected
- Resolved an issue that would add temporary errors to orders that broke a business rule
- Fixed the deselect checkbox functionality so orders are deselected on first attempt.
- Fixed an issue where sorted grids would load twice
- Aligned the bulk actions menu when actions are pinned
- Resolved an error during picking document generation where lines with no location would trigger a bulk actions error.
- Resolved an issue where bulk selecting documents and then paging for more results would clear existing selections
- Resolved an error where adding a new card from the customer wallet would redirect the user back to customer search.
- Resolved messaging around bulk picking to give descriptive errors.
- Fixed an error that would cause bulk actions notifications to be sent to all users in a company
- Resolved an error that would cause temporary bulk errors to persist past 24 hours.
- Fixed an error that prevented the bulk actions menu from closing when clicked
- Fixed an error that would hide the location and unit of measure when documents had open warehouse shipments.
- Created activity logs for allocations and canceled allocations
- Resolved an error that hid the “new contact” and “new address” buttons on the new grids.
- Fixed an issue where the “view in business central” button brought users to the wrong link.

September 21, 2023

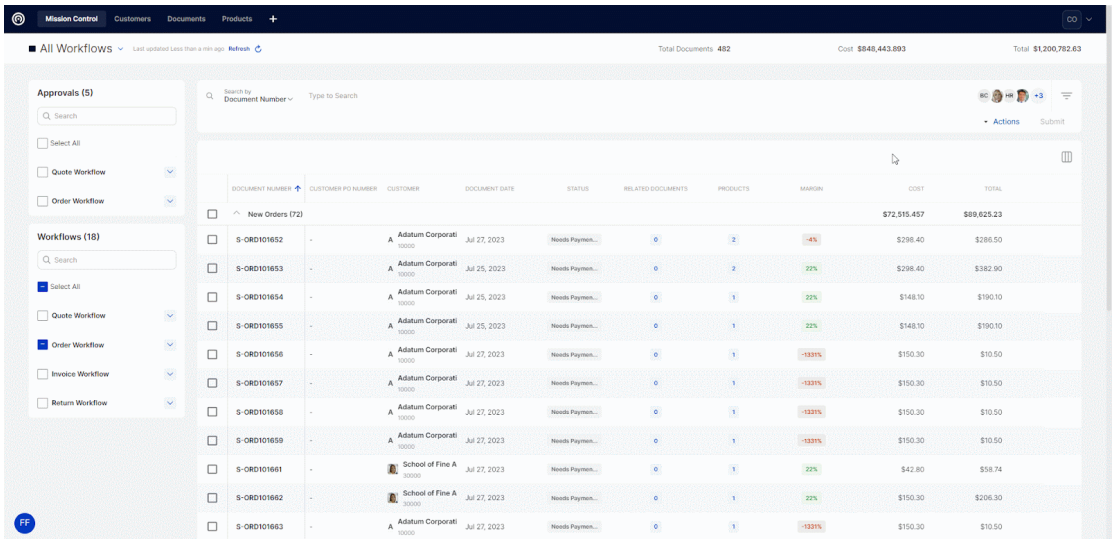
The Business Central extension for this version of Cavallo can be downloaded from AppSource, or is available here (Version 1.0.1320.0). Please note that our non-app source releases will soon discontinue, so please follow the instructions here to switch over to our app source app!

If you use PayFabric in Business Central, and make use of our App Source version of our app, download and install this version of the PayFabric Cavallo extension (Version 1.0.1.0) found here. If you use PayFabric with the non App Source version of Cavallo, load this version of the PayFabric Cavallo extension (Version 1.0.0.26) here.

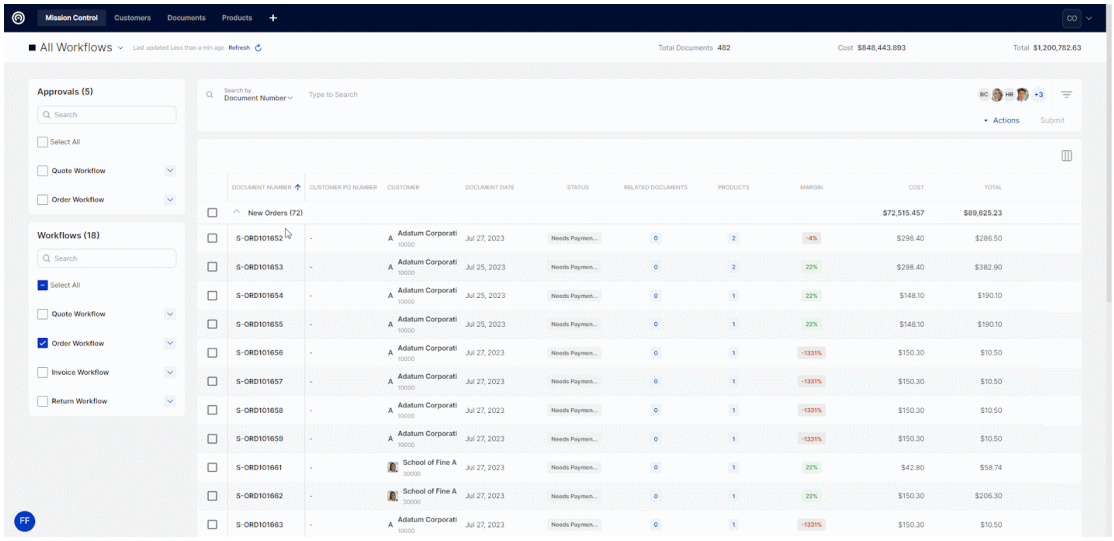
Make sure to load these versions of the extension in your environment to use these new features! Instructions

for installing the latest version of the extension can be found here.

Table Updates
In the latest version, the tables within Cavallo have been overhauled to optimize efficiency in day to day operations and allow users to take actions on multiple documents at the same time. The UI for tables has been updated to support actions such as quickly resizing and reorganizing columns, and new “Bulk Actions” allow users to multi-select documents and take action on them at once instead of one by one.



When an action is selected, the user will be notified that the selected action has been scheduled, and once the action is ran if the action was completed successfully or not, while allowing the user to continue working on tasks in other parts of the application:

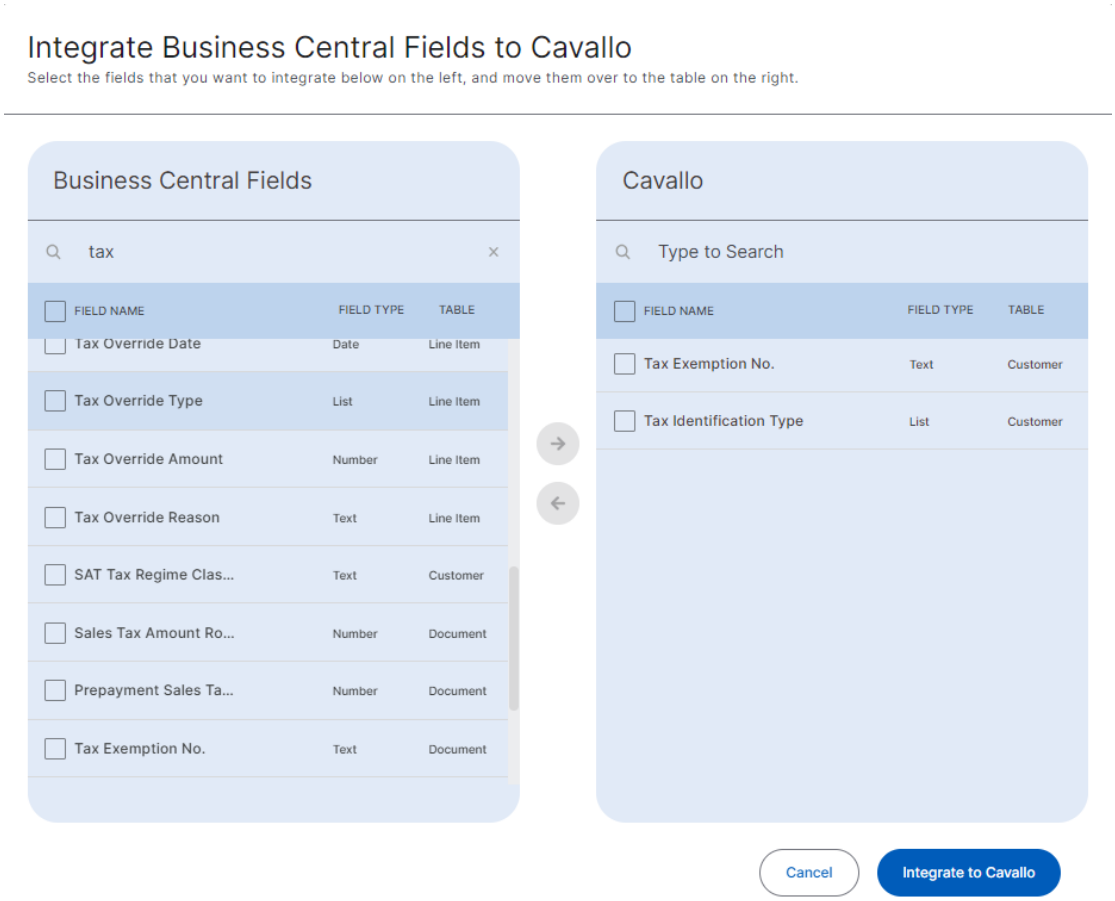


Additional documentation for using the updated tables and bulk actions can be found below:

Using Tables In Cavallo

Cavallo Bulk Actions

Support for non-US regions
The latest version of Cavallo is now compatible and installable in any region! This change allows organizations using versions other than the US version of BC to make use of Cavallo’s powerful order management and order entry tools.



Note: If your company is currently using the U.S. version of Cavallo, some of the immediate changes that you will notice include:

- Tax Identification Type and Tax Exemption fields will no longer displayed by default in Cavallo
- Region-specific shipping information will no longer be displayed

These fields can be reintegrated into the application using the custom fields import functionality (pictured above). If you have a sandbox and production environment, this mapping will need to occur in both environments. More details on how to do this can be found here: Custom Fields.

If you have any other questions or concerns, please feel free to connect with your Professional Service team or technical support.

Other Updates

This version of Cavallo includes a number of fixes and updates around the application, including the following:

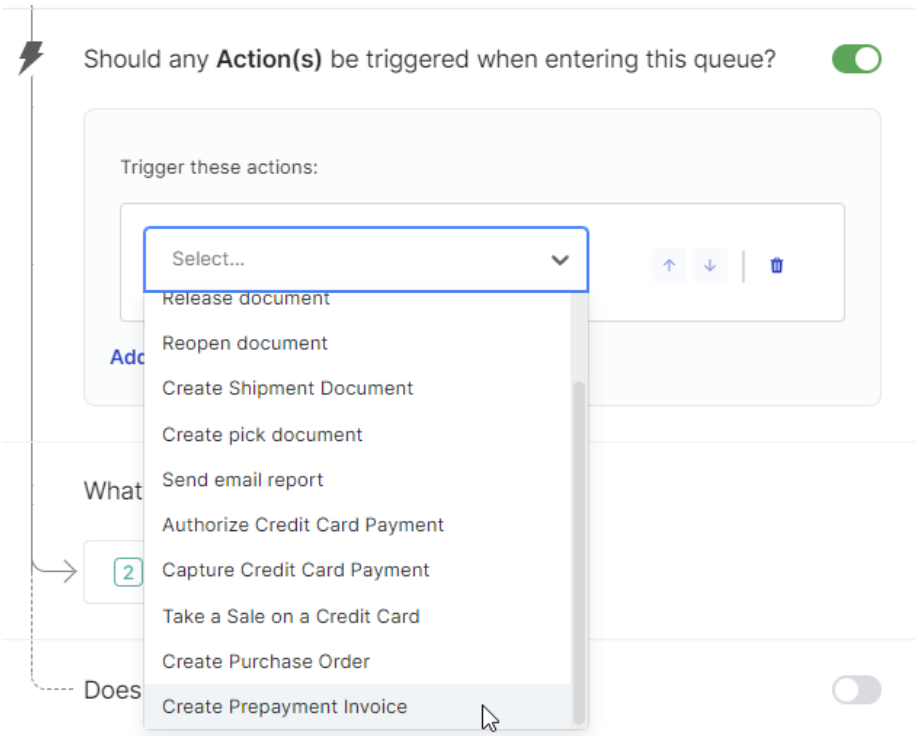
- Fixed an issue with workflow configuration where editing the top queue could cause the app to crash.
- Resolved an issue with new customer creation that could display a blank screen on initial save.
- Added new loading states to address and contact fields on the customer card
- Fixed an issue with workflow alternate paths where changing the “optional name” would result in a publishing error.
- Resolved an error with workflow alternate paths where the credit card amount wasn’t required to save.
- Resolved an issue with business rule notifications that would only show the last rule approved in a series of approvals.
- Fixed an error on the customer wallet that would redirect users that attempted to enter a new card number.
- Resolved an issue with the Cavallo API that prevented users from approving business rules in Business Central.
- Corrected an issue with warehouse picking documents where Cavallo would set the Qty. to handle.

September 8, 2023

The Business Central extension for this version of Cavallo can be found here (Version 1.0.1271.0). If you use PayFabric in Business Central, the latest version of the PayFabric extension for Cavallo can be found here (Version 1.0.0.26). Make sure to load these versions of the extension in your environment to use these new features! Instructions for installing the latest version of the extension can be found here.

Prepayment Invoices in Workflow

Cavallo supports generating prepayment Invoices from sales orders within the workflow. A prepayment invoice can be generated as documents enter a new queue or as they exit the queue. When setting up a prepayment invoice, they can either be set for a percent of the document subtotal or as a percent of the line items.

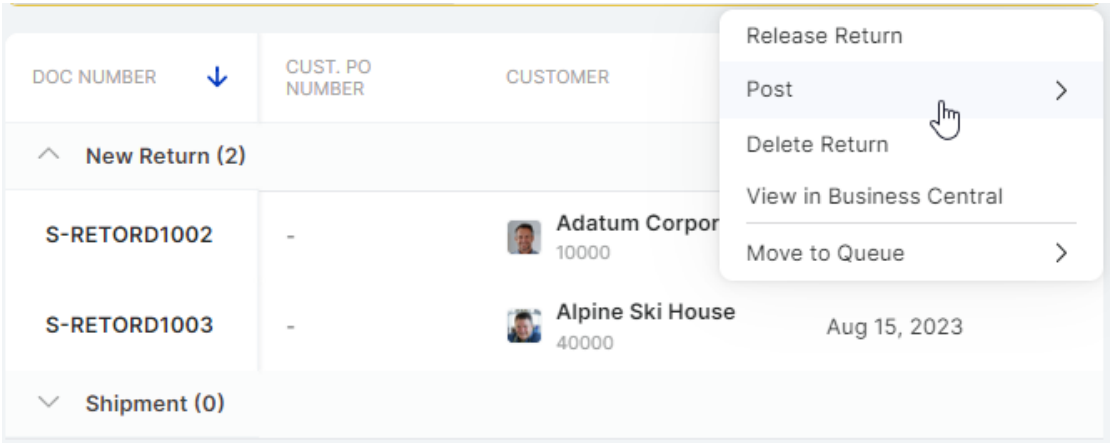


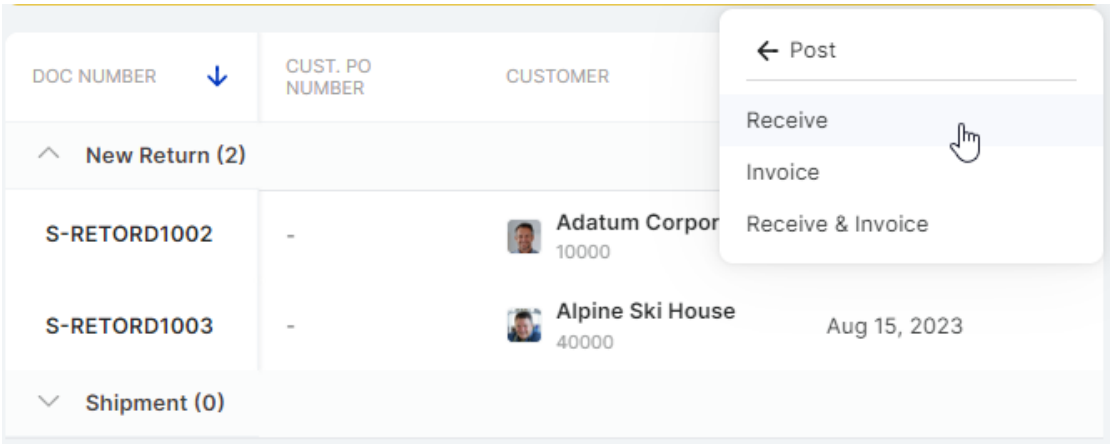
For more information on this, please refer to the following support article:
https://cavallo.kayako.com/article/2358-prepayment-invoices

Receiving/Invoicing Returns

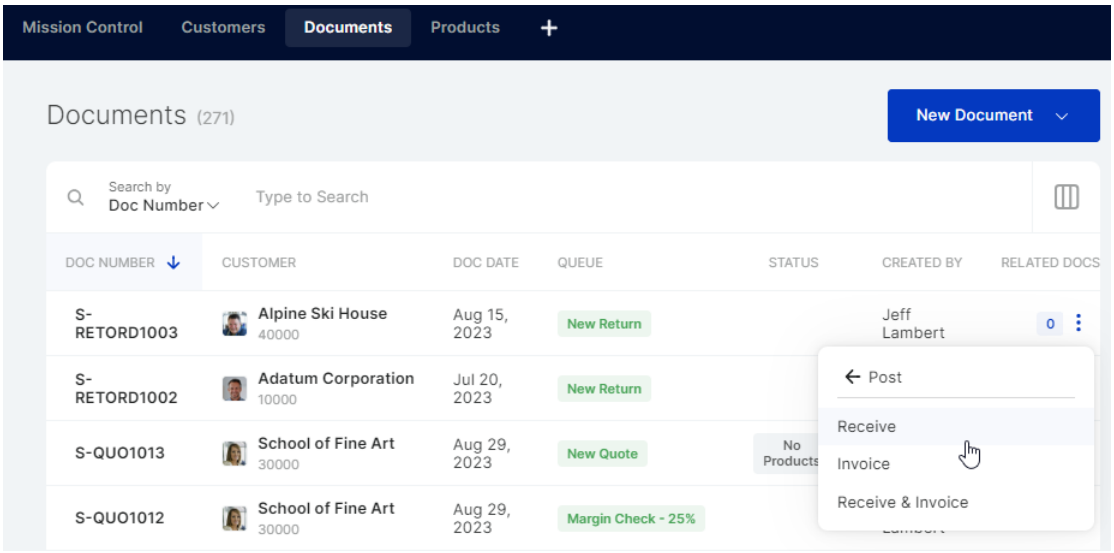
It is now possible to post receiving and invoices for any returns. Currently this can be done in three locations: on Mission Control, on the Document screen, or on the Document detail screen.

On Mission Control:

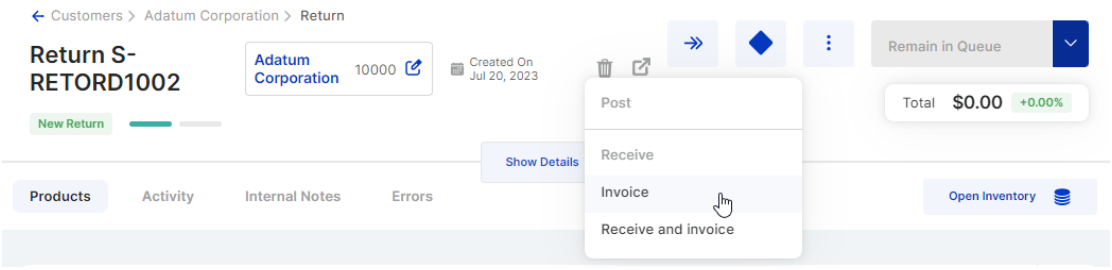




On Document Screen:



On Document Detail Screen:



Other Changes

This version of Cavallo includes a number of fixes and updates around the application, including the following:

- Switched our logins to use Auth0. Support page can be found here.
- Fixed issue with not being able to save payment methods when the Cavallo Custom PayFabric extension was not installed.
- Added support for having a space in the customer number.
- Fixed issue where various fields, including home page, were not saving correctly when entering new customers.
- Resolved issue where some deleted documents were still being tallied in the workflow queue totals
- Fixed error where header level discount values were not being saved, this only affected the percent/value of the discount and did not have impact on the order total.
- Fixed an issue that prevented users from sorting their customers in alphabetical order.

August 23, 2023

The Business Central extension for this version of Cavallo can be found here (Version 1.0.1224.0). If you use PayFabric in Business Central, the latest version of the PayFabric extension for Cavallo can be found here (Version 1.0.0.25). Make sure to load these versions of the extension in your environment to use these new features! Instructions for installing the latest version of the extension can be found here.

App Source
Cavallo is now available on Microsoft AppSource! Being available on AppSource means that users will now be able to download and install our extension via the App Source portal inside of Business Central instead of by manually installing our extension file. If you'd like to make the switch to this new download method, reference the instructions here.

Cavallo will maintain the current process of distributing non-AppSource extensions through the end of September 2023. After that, the Cavallo extension distributed through AppSource will be the only way to get the most recent updates.

Other Changes

This version of Cavallo includes a number of fixes and updates around the application, including the following:

- Fixed an issue where a user would need to refresh their screen to see any changes made within the work description field on the document header.
- Resolved an issue that prevented users from changing the currency on certain customers
- Added support for loading default values for General Business Posting Group and Location Code on customer templates when creating new customers.
- Resolved an error that would prevent the Cavallo API from being set automatically in Business Central
- Resolved an issue that prevented open orders from generating shipment documents.

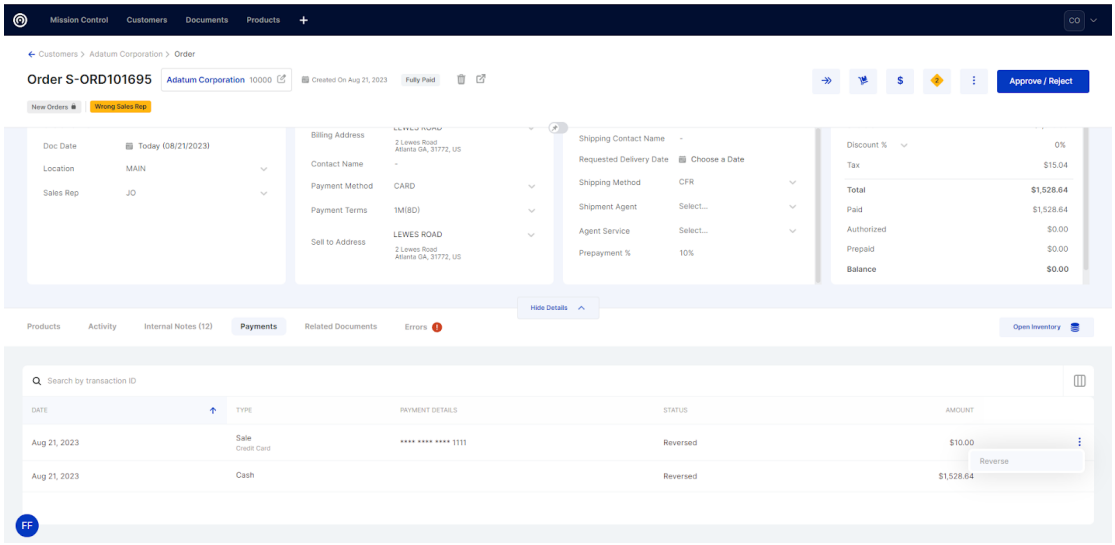
- Resolved an issue where reversing a payment in Business Central was not writing back to Cavallo.
- Fixed an issue where workflow actions would attempt to allocate and backorder non inventory items.
- Added the ability to add a negative quantity on orders
- Resolved an issue which would prevent margin from being calculated properly in some circumstances.

August 10, 2023

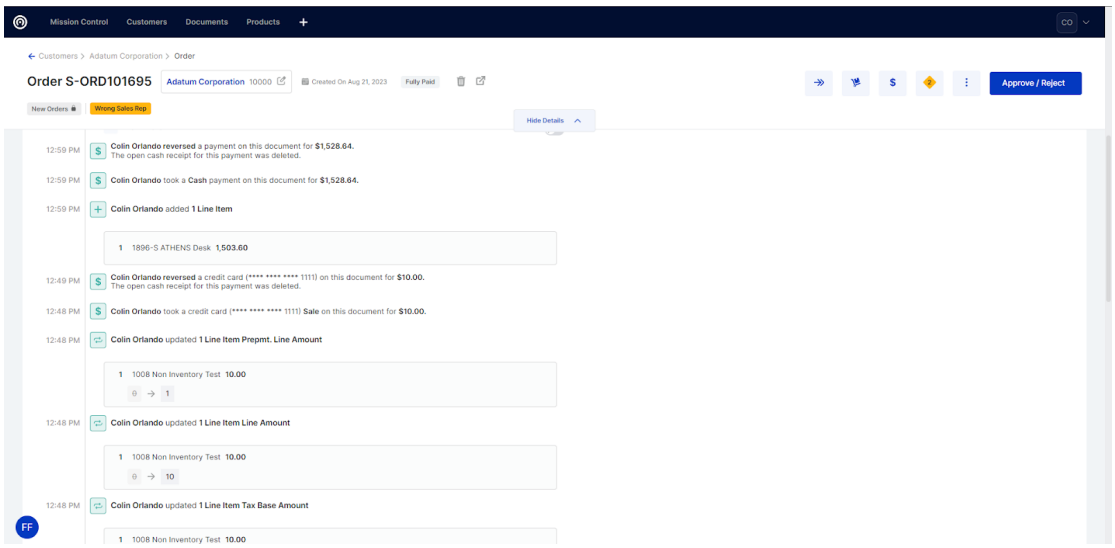
The Business Central extension for this version of Cavallo can be found here (Version 1.0.1103.0). If you use PayFabric in Business Central, the latest version of the PayFabric extension for Cavallo can be found here (Version 1.0.0.24). Make sure to load these versions of the extension in your environment to use these new features! Instructions for installing the latest version of the extension can be found here.

Reversing Payments for Sales Orders

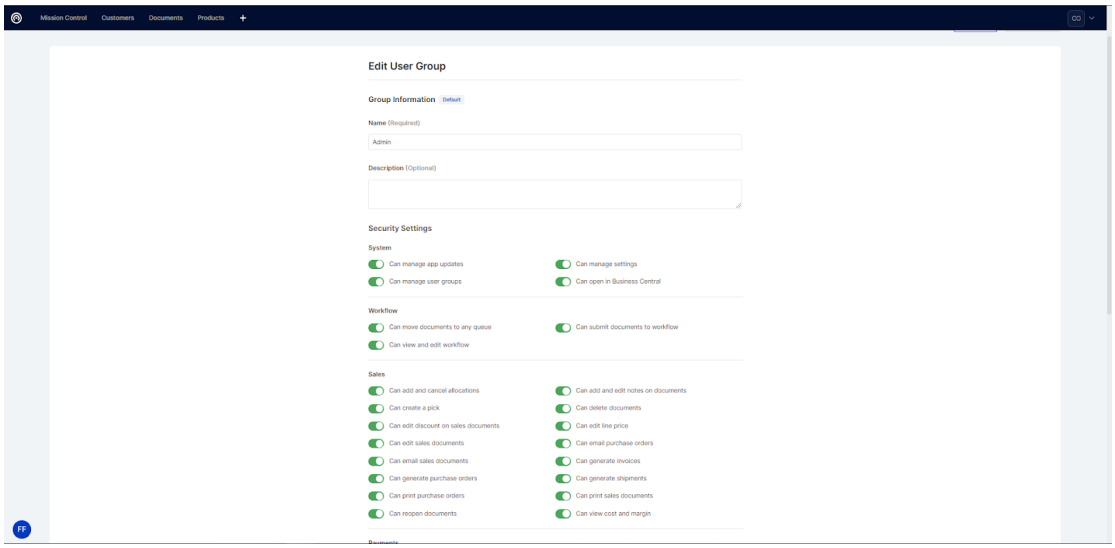
In the latest version of Cavallo, we have built out a major enhancement to our payment processing system which will allow users to execute reversals on any existing payment. We understand that flexibility and control over payment transactions are essential for your business operations. The reversal feature empowers users to effortlessly handle refunds from credit, cash and check transactions all within our intuitive and user-friendly platform. In recent releases we've also made a number of other changes in our PayFabric integration, including support for passing Level 2 and 3 payment data to further bolster payments.



In the photo above, there are two main updates that have been made to the payments tab to allow users to track reversals. First off, a new column called "Status" has been added to the column chooser to allow users to understand where in the payment currently sits in its lifecycle. Second, the ability to reverse any given payment has been added to an ellipsis menu on the payment line.



The Cavallo activity log has also received update to reflect when a payment was reversed and if the corresponding cash receipt was deleted in the process.



Last but not least, a new security setting has been added to allow users to control who has the ability to reverse a payment in Cavallo.

Other Updates

- Added support for generating “Take” and “Place” lines on warehouse picks
- Added the language code field to customer creation and customer card
- Resolved an issue that caused variant availability to be off
- Fixed the alignment for the qty allocated icon on sales documents
- Resolved an issue that would prevent searching by document number on the product card
- Fixed an issue that prevented printing archived documents
- Resolved an issue that was preventing business rule approval/rejection emails from being sent
- Updated the length of approval comments shown in the activity log to be no more than the first 300 characters, this does not change the max character length of individual comments on business rule approvals (up to 600)
- Added the ability to enter a negative quantity when creating/editing an order
- Updated the length of Address Code to 10 characters to align with BC field structure
- Fixed a bug with not being able to delete any imported custom fields
- Fixed a bug where the email address for a customer contact was not being saved properly
- Updated the ability to delete and re-sequence workflow actions
  Added better visibility into invoice types for posted invoices

July 26, 2023

The Business Central extension for this version of Cavallo can be found here (Version 1.0.1077.0). If you use PayFabric in Business Central, the latest version of the PayFabric extension for Cavallo can be found here (Version 1.0.0.23). Make sure to load these versions of the extension in your environment to use these new features! Instructions for installing the latest version of the extension can be found here.

This version of Cavallo includes a number of fixes and updates around the application, including the following:

- Added support for sending level 2 and level 3 payment data while processing credit card payments with Nodus PayFabric.
- Added the "Work Description" field to Sales Documents
- Resolved an issue in Mission Control where all filters would be removed when removing a single filter.
- Resolve an issue where scrolling in the window for building filters would reset the entire screen's scrolling behavior.
- Resolved an issue which prevented some on-premises Business Central companies from adding sales lines to documents.

July 12, 2023

The Business Central extension for this version of Cavallo can be found here (Version 1.0.996.0). If you use PayFabric in Business Central, the latest version of the PayFabric extension for Cavallo can be found here (Version 1.0.0.23). Make sure to load these versions of the extension in your environment to use these new features! Instructions for installing the latest version of the extension can be found here.

This version of Cavallo includes a number of fixes and updates around the application, including the following:

- Fixed an error with purchase order generation that would prevent users from using any option except for “backordered qty”
- Improved our error messaging when purchase orders fail to generate.
- Resolved issues with payfabric where shipping and billing addresses failed to populate on new cards
- Corrected problem where margin calculations were not displaying properly and causing issues transitioning through the workflow
- Improved error messaging capture to help improve production support
- Fixed an issue that prevented all payment terms from appearing in dropdown menu

June 28, 2023

The Business Central extension for this version of Cavallo can be found here (Version 1.0.977.0). If you use PayFabric in Business Central, the latest version of the PayFabric extension for Cavallo can be found here (Version 1.0.0.23). Make sure to load these versions of the extension in your environment to use these new features! Instructions for installing the latest version of the extension can be found here.

This version of Cavallo includes a number of fixes and updates around the application, including the following:

- Resolved an issue with margin sometimes being calculated incorrectly
- Fixed an issue that would prevent the correct workflow queue from showing on quotes in Business Central
- Updated existing error messaging on purchase orders to show proper error text.
- Resolved an issue preventing users from printing archived quotes
- Updated existing business rules notification logic to show the number of rules approved in one action.
- Fixed display issue when trying to save a business rule when a required field is missing.
- Fixed the logic when saving a business rule while using the “Is After” selector for a date.

June 14, 2023

The Business Central extension for this version of Cavallo can be found here (Version 1.0.917.0). If you use PayFabric in Business Central, the latest version of the PayFabric extension for Cavallo can be found here (Version 1.0.0.23). Make sure to load these versions of the extension in your environment to use these new features! Instructions for installing the latest version of the extension can be found here.

This version of Cavallo includes a number of fixes and updates around the application, including the following:

- Fixed several issues that would cause document margin to show incorrectly

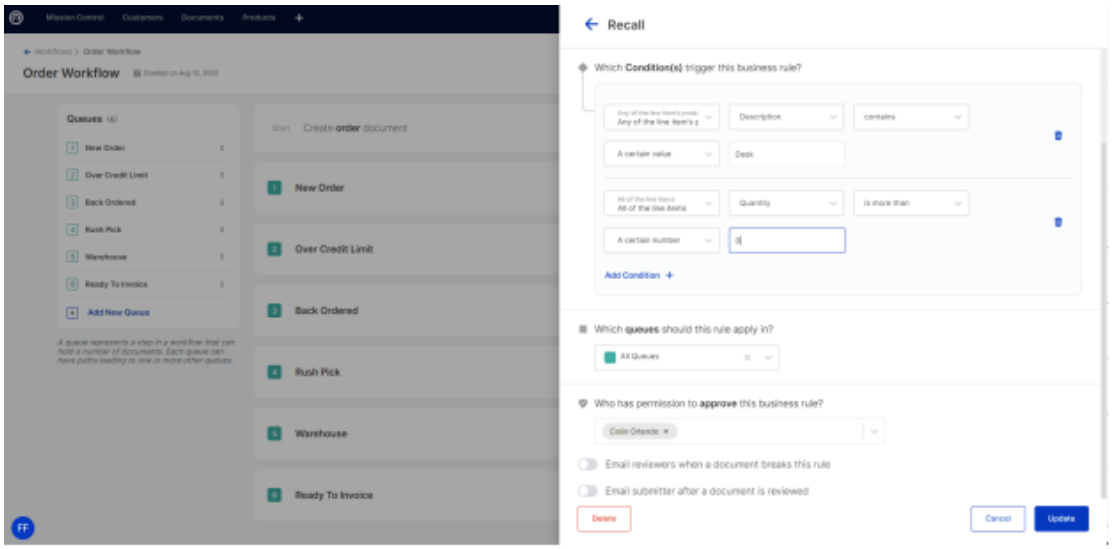
- Fixed an issue on the user security settings that would kick users back out to the customer search if the screen size became too small.
- Resolved an issue where comment lines would register incorrectly with non-item lines.
- Fixed an issue where the display indicator on select non item fields would appear blank
- Resolved an issue with the invoicing functionality from mission control where incorrect values were shown in the “qty to invoice” field.
- Fixed an issue with backorder and allocations validation where incorrect quantities could be shown if an item was over allocated.
- Fixed several issues within Workflow that blocked the ability to save changes.
- Fixed issue within Workflow that would not properly display table options for filters

June 1, 2023

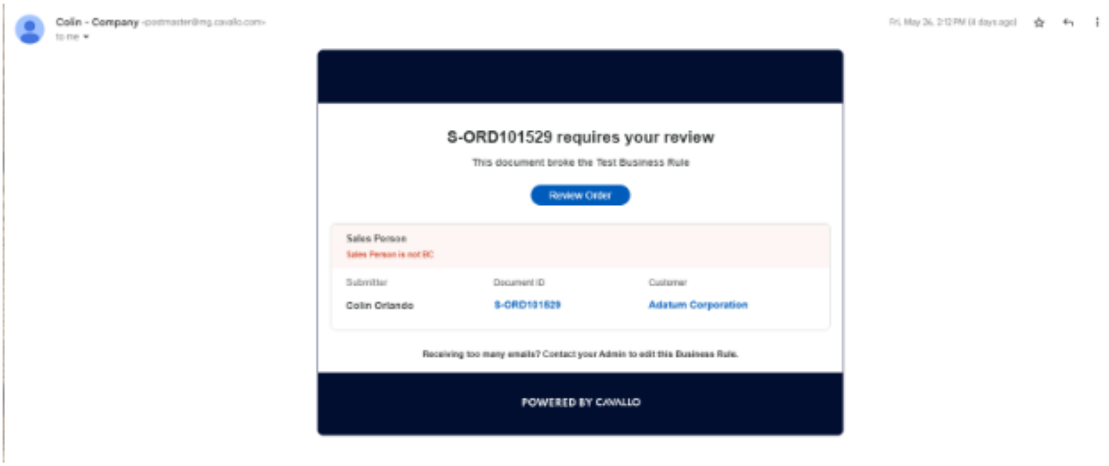
The Business Central extension for this version of Cavallo can be found here (Version 1.0.900.0). If you use PayFabric in Business Central, the latest version of the PayFabric extension for Cavallo can be found here (Version 1.0.0.23). Make sure to load these versions of the extension in your environment to use these new features! Instructions for installing the latest version of the extension can be found here.

Emails for Business Rules

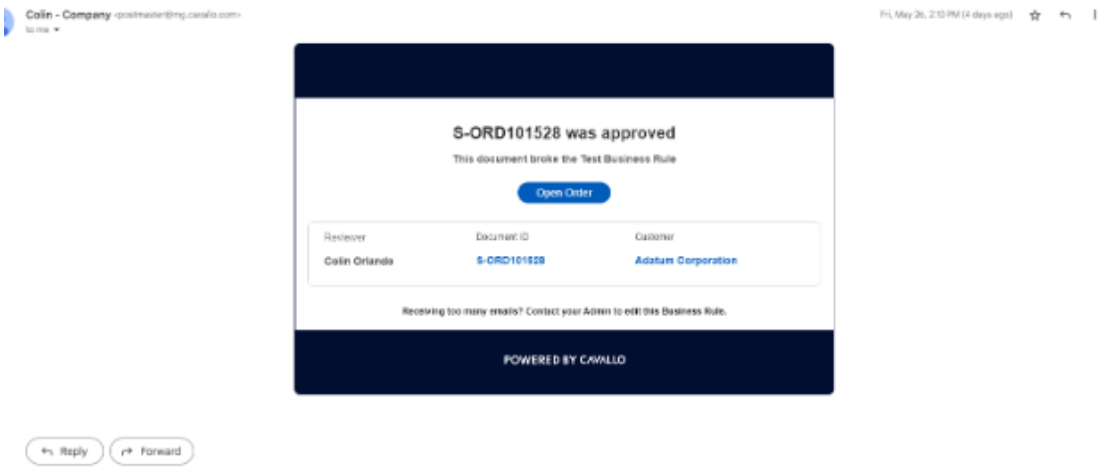
When managing quotes, orders, and invoices, communication about issues is important, and every minute can count if you're waiting on an approval for a certain document. To help with this need, the latest version of Cavallo includes new functionality that allows users to be emailed when Business Rules are broken, approved, or rejected!



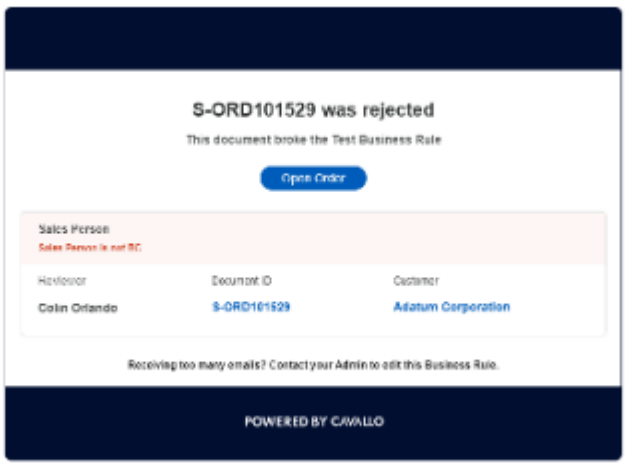
In the example above, in order to receive an alert for any given business rule, there are two toggles that have been added to the business rule configuration screen. The first toggle will email the group of users who are allowed to take action on the specific business rule (Reviewers), while the second toggle will email the user that submitted the order to review (Submitters). These toggles are off by default, but edited at any point.



Once an order has been submitted for review, the email will be sent out in the above format. Each email will show one business rule with all the conditions that require attention with the ability to click “Review Order” and navigate directly to the order in question. In the event that more than one rule is broken, the email notifications are programmed to send on queue entry. Once the first business rule is resolved, the order will automatically move to the next broken rule queue and then email will be triggered.



For each decision that is made, the submitter will receive an email notification with the comments of the reviewer if applicable. In the event all rules are approved, the final approval email will alert the submitter the order has been approved to move on. In the event of a rejection, the email will alert the user the order has been rejected. See the above and below images for the exact formatting.



Understanding how critical processing time is during any sales cycle, business rule notifications aim to empower users by allowing them to tackle bottlenecks head on and to ensure each order is following the standard operating procedures of the organization.

Other Updates

- Added the ability to copy the tracking number from the package tracking number field
- Added the location for each line on the "Generate Pick" modal
- Added the ability to print historical sales documents
- Resolved an issue with printing from specific pop ups such as when an order is fully invoiced.
- Added support for inventory visibility per item variant
- Fixed an issue where the lines location wouldn’t reset if a new variant was chosen
- Fixed an issue where the archived purchase order report would appear empty
- Fixed an issue around the business rule condition builder that allow conditions to be shown in the correct order.
- Resolved issues around mission control where the screen would not refresh following a purchase order generation.
- Resolved an issue where certain specific items would not show because of issues with the sku
- Added support for the bin code field within the Cavallo sales line grids
- Added support for bin selection logic when generating warehouse picks and shipments in Cavallo
- Resolved an issue that would prevent printing archived quotes
- Fixed an issue where archiving a document with broken business rules would lead to a locked state.
- Added logic that prevents manual queue movement for documents with broken business rules.
- Resolved an issue with the product card where specific scenarios would leave the documents tabs blank
- Fixed an issue where publishing a new business rule for a workflow would clear order statuses
- Fixed the horizontal margins on the new queue window in workflow creation
- Resolved an issue with date conditions that would prevent business rules from saving
- Resolved an issue on automated actions where the status “fully received” was preventing saves.
- Fixed an issue where automated a