Mission Control: Setup Steps

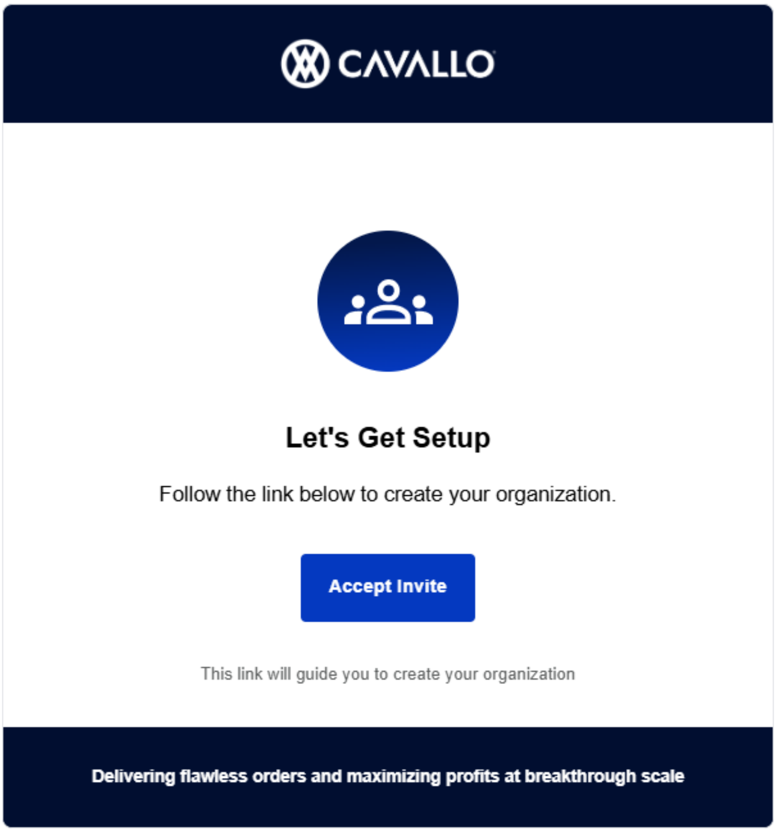
Product Development - 2026-08-28 - Mission Control Documentation

Mission Control setup involves installing the User Management app, connecting it to Business Central, and adding users. After these initial steps, you can create your operational workflows, establish business rules to safeguard your documents, and configure automatic actions to keep everything moving without manual user intervention. There are also optional setup steps for those who need to lock down BC UI to enforce workflow paths, or log extra details to BC's native activity logs.

Check out the Mission Control Documentation page for the full list of setup and feature documentation for Mission Control.

Install Mission Control for BC

When you buy Mission Control, Cavallo sets up your organization and assigns the first owner role. Your owners will have full admin rights to introduce other admins and users, and control those users' access rights. The first owner is notified with a welcome email where they can log into the User Management web app and begin setting up Mission Control.



Log in with your Microsoft credentials to connect Mission Control to your Business Central environment. You will receive instructions to install the Cavallo Core Connector extension for BC, and then use that to connect your BC environment to the User Management app.

Configure the S2S Connection

A Service to Service connection allows Mission Control to communicate with BC. Microsoft has in-depth documentation on this native BC functionality here. You can simply follow the steps below to establish this connection.

1. In the Business Central client, search for Microsoft Entra Application (formerly known as Azure Active Directory Application) and launch the page
2. Select "New" to create a new connection
3. In the Client ID Field, enter the Application (Client) ID for Cavallo: **f24cae8d-df4f-4729-9ea8-d2d84c53c7be**
4. Enter the Description field as “Cavallo”
5. Set the state to Enabled. This will prompt to create a user for the connection if it doesn't already exist, select "Yes" to continue
6. Assign the **D365 BUS FULL ACCESS**, **D365 Snapshot Debug** and **CAVALLO ALL ACCESS** permission sets in each company which will be accessed by Cavallo
    1. If Nodus PayFabric is installed in the company, also give the **NODUS PF ALL ACCESS** permission set in each company
    2. If Avalara AvaTax is installed in the company, also give the **AVA AVATAX POST**, **AVA AVATAX SETUP** and **AVA AVATAX VIEW** permissions set in each company
    3. If any InsightWorks modules are installed, also give any InsightWorks permission sets, including **IWORKS COMMON**, **LICENSE PLATE MGMT**, and **WHI-ALL**
    4. If Versapay is installed in the company, also give the **EFT GENERAL -CL-** permission set
    5. If you are using service documents, also give the **D365 BUS PREM** permissions in each company
7. As an Administrator Entra user, select the “Grant Consent” button in the header of the screen to establish the connection
    1. Note that this typically requires an IT admin who has access to grant OAuth consent for applications

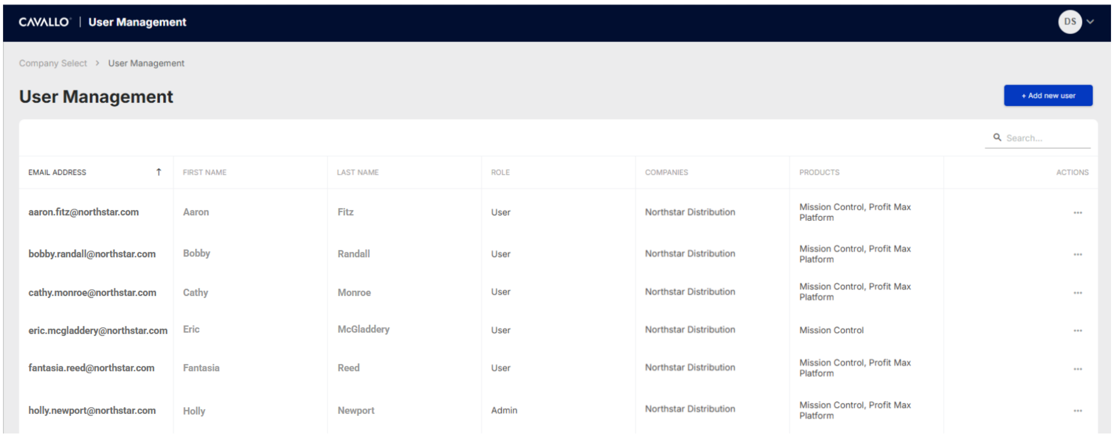
Once this connection is complete, Mission Control can communicate with Business Central.

Add Users

Invite other Mission Control users as owners, admins, or users.

- Owners can do everything that admins can do, and they can also manage other owners.
- Admins will be able to add other admins and users, and control their access rights within the User Management app.
- Users will be able to use Mission Control products within Business Central. They do not need to log into the User Management app directly - when they first try to use a Mission Control feature in BC, they will be prompted to log in with their Mission Control credentials.

Invited users will receive a welcome email with a link to log in and complete their setup. They can log in with either the Microsoft account that they use to log into Business Central, or a Google account.



BC Super users automatically have admin access to control Mission Control features and configuration within BC.

Set Up Workflows

Mission Control workflow is a robust document process orchestration engine. You can quickly and easily build out tailored, automated processes that route sales documents and service documents through defined workflow queues, fully controlling how they move from entry through fulfillment and invoicing. For in-depth steps on setting up your workflows, refer to this documentation.

Set Up Business Rules

Business rules ensure that documents meet specific requirements before they are allowed to continue in workflow. In many cases, business rules are used to make sure that a document does not need any corrections or updates. They can also add extra validation around potential concern points, such as low order margin. For more information on setting up business rules, refer to this documentation.

Set Up Automatic Actions

Automatic actions ensure that documents automatically progress in workflow if they meet specific criteria, which eliminates manual user intervention. This gives business owners confidence that their documents are moving through the pipeline, and it provides greater control for the entire process flow. For details on setting up automatic actions, refer to this documentation.

Optional Setup Steps

Lock Down BC UI

Mission Control also includes the capability to lock down certain actions in BC, enforcing workflow by preventing users from manually releasing, reopening, and archiving documents, among other things. For more information on this access control, refer to this documentation.

Log Extra Details

Mission Control can also add extra logging to the native BC activity logs about changes it makes to documents and lines. For more information on this extra logging detail, refer to this documentation.