Mission Control: Workflow Actions

Product Development - 2026-08-20 - Mission Control Documentation

Mission Control Workflow Actions

The following table lists all currently supported workflow actions for Mission Control. These actions can be set up to trigger automatically as documents progress through workflow. For more information on workflow configuration, refer to this documentation.

Important note: some of the following workflow actions require certain SalesPad for BC add-ons, BC add-ons, or extra configuration steps. The table includes details on those dependencies where applicable.

Category	Action	Description	Special Notes	Requires	Doc Types	Extra Config
Reservations	**Reserve Inventory for All Items**	Reserves available inventory against every reservable line on the document	Follows BC's inbound inventory hierarchy Respects the workflow's backorder method Successful even when no quantity was reserved	N/A	Sales Orders	No
Reservations	**Remove All Inventory Reservations**	Cancels all reservations on the document	Releases inventory to available stock Does not change line backorder quantities Successful even if the document had no reservations	N/A	Sales Orders	No
Reservations	**Reassign Sales Order Reservations**	Transfers reservations from source docs to target docs based on BC's Reservation Reassign Policy	Policy with lowest sequence number wins Successul even when doc has no matching policy	Reservation Reassignment license in BC Reservation reassign policy set up	Sales Orders	Yes
Lifecycle	**Release Document**	Transitions the document to Released status in BC, locking it from further changes	Successful even when the document is already released	N/A	Sales Orders, Sales Invoices, Sales Return Orders	No
Lifecycle	**Reopen Document**	Reopens a previously released document in BC, restoring its editability	Successful even when the document is already open	N/A	Sales Orders, Sales Invoices, Sales Return Orders	No
Lifecycle	**Quote to Order**	Closes the current quote and creates its corresponding order	Configured via the Transfer option instead of Action in workflow	N/A	Sales Quotes	No

Lifecycle	**Order to Posted Invoice**	Closes the current order and creates its corresponding posted invoice	Configured via the Transfer option instead of Action in workflow The posting date can be set to match the current date, the document date, or the posting date Invoices can also be automatically emailed when the toggle is set	N/A	Sales Orders	No
Editing	**Update Document**	Updates one or more fields on the document header using mappings from customer fields, document fields, or fixed values	Custom fields are supported on both source and target	N/A	Sales Orders	Yes
Editing	**Update Costs**	Recalculates and updates cost values on the document lines based on current item cost data in BC		N/A	Sales Orders	No
Editing	**Add Document Line**	Adds a new line item to the document with a configured line type and field-to-field mappings for the new line	Item Type can be one of: Item (default), Comment, G/L Account, Resource, Fixed Asset, Charge (Item), Allocation Account.	N/A	Sales Orders	Yes
Editing	**Reprice**	Recalculates pricing for every line on the document based on the latest pricing rules		Advanced Pricing add-on	Sales Orders	Yes
Purchasing	**Create Purchase Order**	Creates purchase orders for sales lines that have valid purchasing codes, vendors, and remaining quantities above zero	Lines are grouped into separate POs for each combination of purchasing code and vendor After the PO is created, the PO Number is set on the sales lines, and the SO Number is set on the purchase lines POs can also be automatically emailed when the toggle is set	BC vendors set up Purchasing codes on items set up	Sales Orders	Yes
Purchasing	**Create Purchase Order and Reserve**	Creates POs for sales lines with remaining quantities above zero and automatically reserves the purchased inventory against the originating sales lines	The total unreserved quantity is added to the purchase order Reservations persist until the purchased inventory is received and consumed by the linked sales order	BC vendors set up Purchasing codes on items set up	Sales Orders	Yes
Warehouse	**Create Pick Document**	Creates a warehouse shipment for the document along with a warehouse pick for all pickable lines	"Available" vs "Reserved" determines which line quantities are considered pickable	BC warehouse locations set up	Sales Orders	Yes
Warehouse	**Generate Warehouse Shipment**	Creates a warehouse shipment for the document		BC warehouse locations set up	Sales Orders	No

Warehouse	**Create Posted Shipment Document**	Creates and immediately posts a sales shipment for the document, producing a Posted Sales Shipment in BC	Uses BC's sales shipment posting mechanism The shipment date and posting date can be individually set to match the current date, the document date, or the posting date Lines that cannot be shipped are skipped	N/A	Sales Orders	Yes
Payment	**Create Prepayment Invoice**	Creates and posts a prepayment invoice for the document using the configured prepayment percentage on the document or customer	Prepayment percentage can be set to calculate a percentage of the line or of the document subtotal Prepayment invoices can also be automatically emailed when the toggle is set	BC prepayment config set up	Sales Orders	Yes
Payment	**Authorize Credit Card Payment**	Authorizes (holds) funds on the customer's default credit card without capturing the payment	Amount to authorize can match the order balance or the balance of shipped items Multiple authorizations on the same document each create separate holds Authorizations are held per PayFabric's configured hold duration	Credit Card Processing add-on PayFabric in BC Customer default card set up	Sales Orders	Yes
Payment	**Capture Credit Card Payment**	Captures previously authorized funds on the customer's credit card, finalizing the transaction	Amount to capture can match the order balance or the balance of shipped items Capture cap behavior can be modified to cap at the original authorization amount, or allow capturing more than what was authorized	Credit Card Processing add-on PayFabric in BC Prior authorization on document	Sales Orders	Yes
Payment	**Take a Sale on a Credit Card**	Performs both authorization and capture in a single atomic transaction	Amount to capture can match the order balance or the balance of shipped items Unlike authorize-then-capture, a declined card cannot be retried at a later workflow step	Credit Card Processing add-on PayFabric in BC Customer default card set up	Sales Orders	Yes
Payment	**Create a PayLink**	Sends a payment link to the billing customer's email address, allowing them to complete payment via the link	PayLinks can be set to authorize, which only creates a hold, or charge, which will process the full payment on submission Amount to authorize or capture can match the order balance or the balance of shipped items	Credit Card Processing add-on PayFabric in BC Customer billing email set up	Sales Orders	Yes
Comms	**Send Email Report**	Sends the document as an email using a Business Central report layout to one or more recipients	Any layout for any of the built-in BC Sales Header printed reports can be configured to send	BC printed reports set up	Sales Orders, Sales Invoices, Sales Return Orders	Yes
Comms	**Smart Printing**	Triggers Smart Printing based on the active print profiles for the document, which can result in printing and/or emailing		Smart Printing add-on	Sales Orders, Sales Invoices, Sales Return Orders	Yes

External	**Webhook**	Sends an HTTP POST request with document data to a user-specified URL	A Test button sends a test request to the entered URL and displays a pass or fail result based on the response	Webhook endpoint set up	Sales Orders, Sales Invoices, Sales Return Orders	Yes