Mission Control: Workflow Management

Cavallo Support - 2026-10-26 - Mission Control Documentation

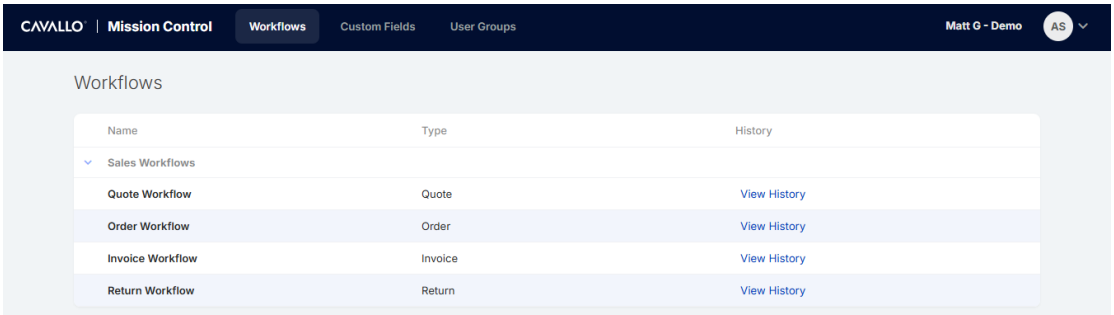
Mission Control Workflow Management

Mission Control workflow is a robust document process orchestration engine. Users 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. Business rules ensure that documents meet certain checks and otherwise reroute to manager review queues, and automated actions submit documents through workflow automatically in the background on defined schedules to keep processes moving without manual user intervention.

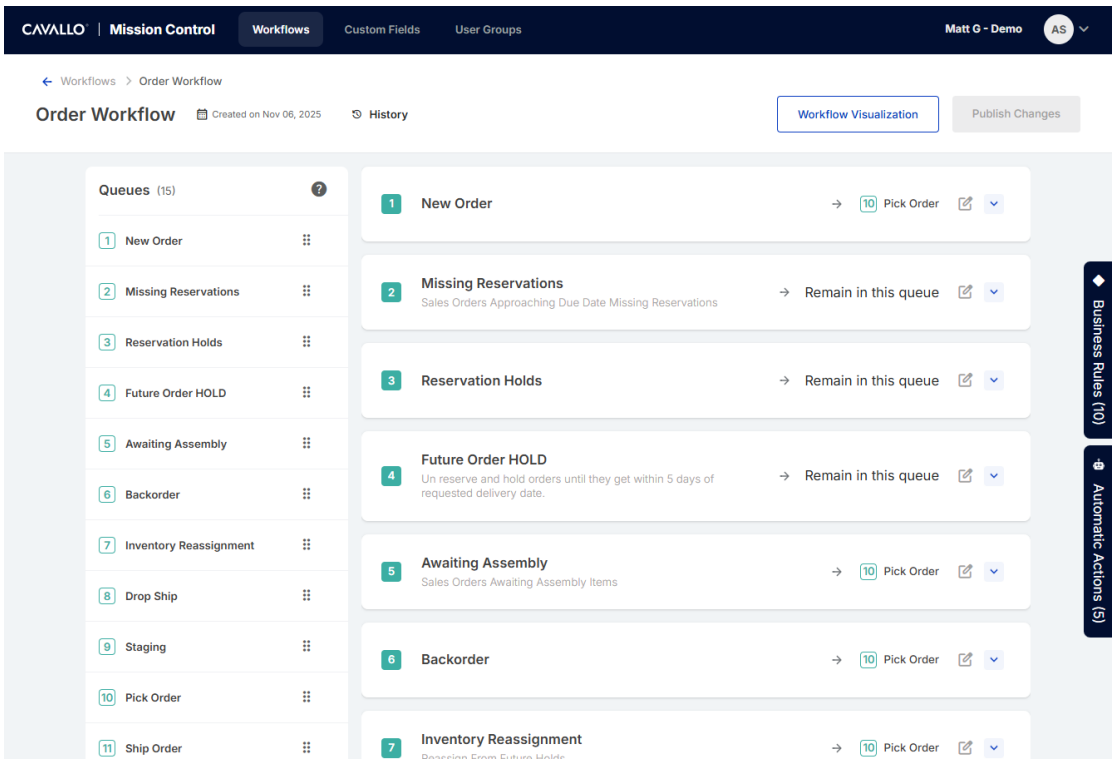
- Workflow Configuration
- Conditions
- Actions
- Primary Path
- Alternate Paths
    - Actions
    - Transfers
    - Processing Order
- Saving and Publishing
- Configuration Decision Trees

Workflow Configuration

In the User Management app, select the Workflows option at the top left. The Workflows screen shows the four possible sales workflow types: Quote, Order, Invoice, and Return. If you use service documents, service quotes, orders, and invoices will also be available.

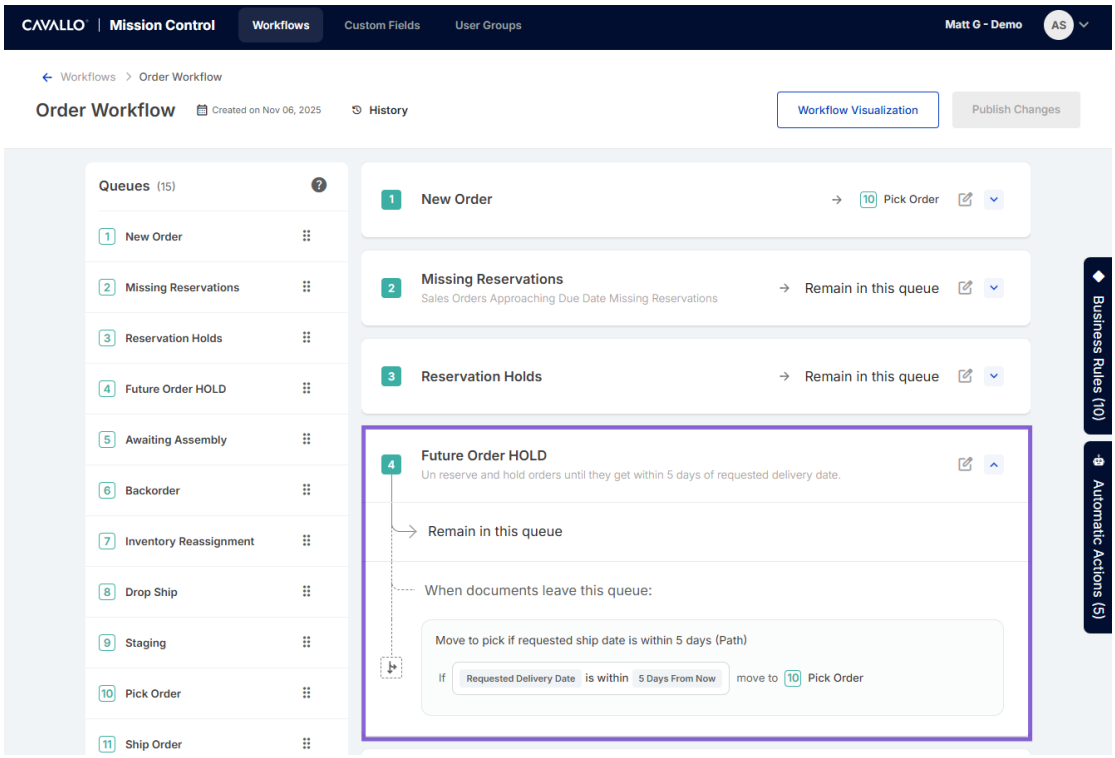


Each document type has its own individual workflow. Select one to view and edit it.

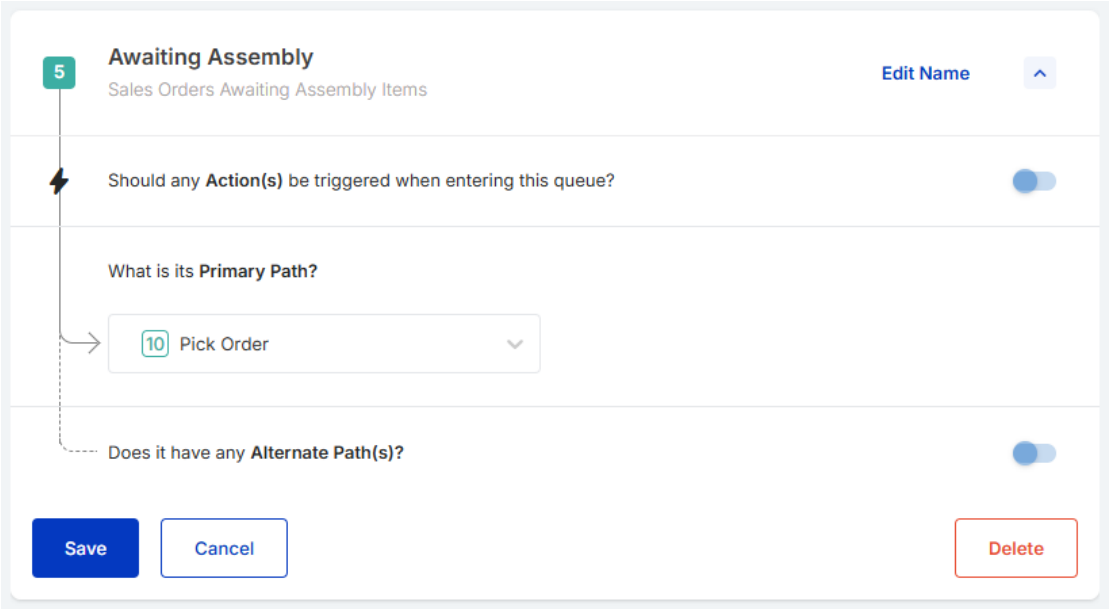


In the Queues list on the left, you can add new queues for this workflow by clicking Add New Queue and following the prompt directions. Reorder a queue by clicking and holding the dots on the right side of the queue name, then dragging and dropping it into a new position in the list.

To the right of the Queues list, each workflow queue's details can be configured. Click the caret button on the right side of the drawer to expand it and see its details at a glance.

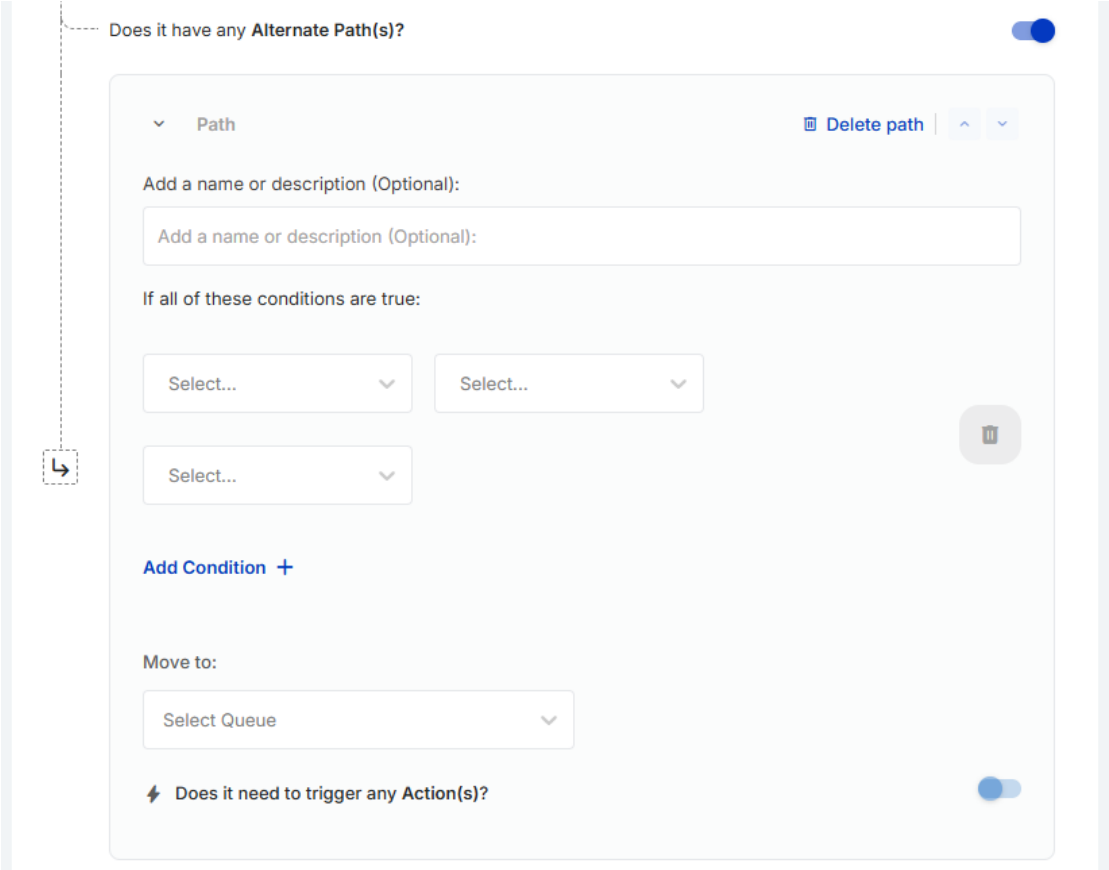


Click the edit button to edit the selected queue.



With the queue expanded, various options become available:

- Actions can be triggered when a document enters the queue
- The primary path controls where the document goes next
- Alternate paths can control other possible queue destinations for documents
    - Actions can be triggered when a document leaves the queue
    - Transfers can be triggered to convert quotes to orders, or orders to posted invoice



Conditions

Conditions can be used to route certain documents to specific queues and control which orders trigger workflow actions. This can be based on:

- Document fields and dimensions
- Customer fields and dimensions
- Line item fields and dimensions
- Product fields

When checking line item fields and dimensions as well as product fields, there are options to restrict processing based on “all”, “any”, and “none”:

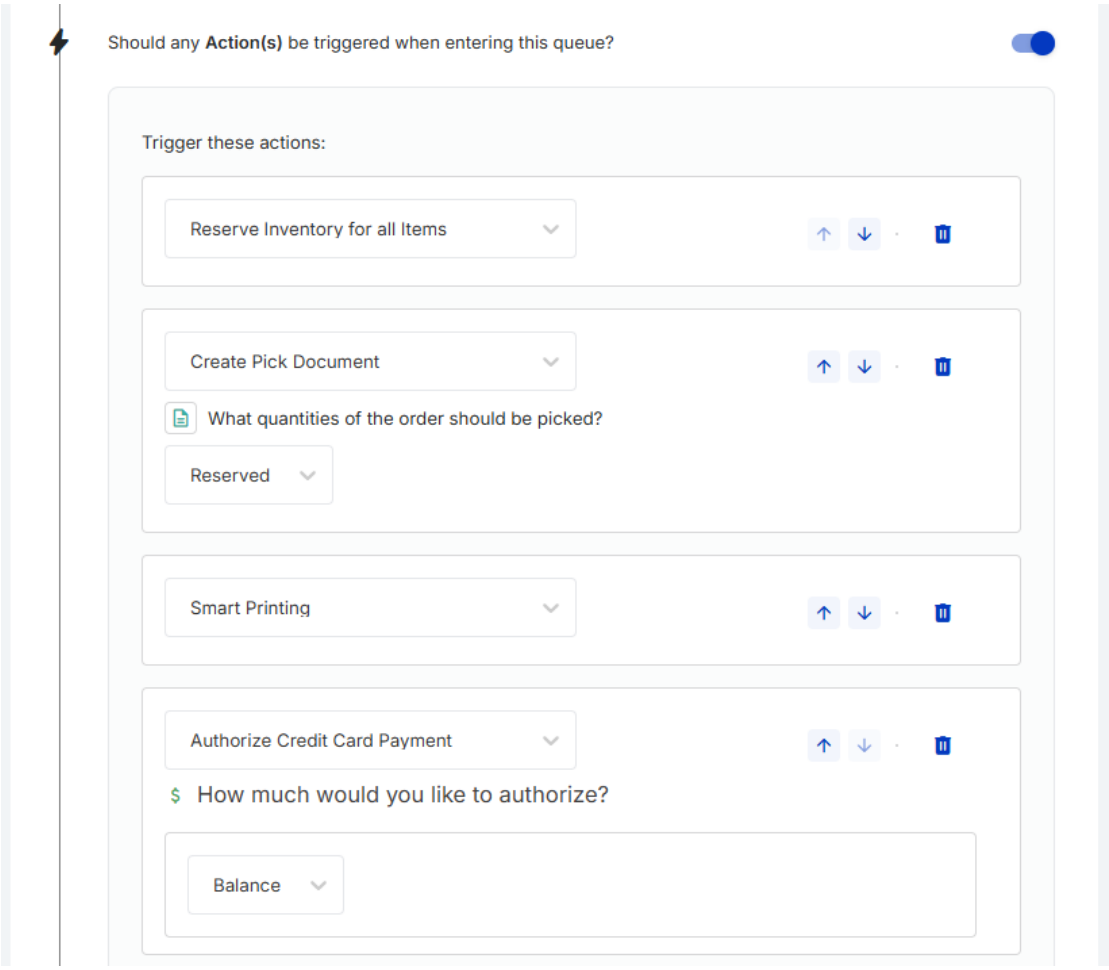
- Checking “all” means all line items / products on the document must meet that condition
- Checking “any” means that at least one line item / product on the document must meet that condition
- Checking “none” means that no line items / products on the document are allowed to meet that condition

When using multiple “any” checks as part of the same condition, each condition must be met for the same single line item. If a condition is set to check whether any line item has a certain custom field flagged and any product has a certain item class, then one line item on the order must have that field flagged and have that item class. If one line item has that field flagged, and a separate line item has that item class, then that will not pass the check. If your situation needs that to be allowed, then you must create separate alternate paths or automatic actions for each of the “any” checks.

Actions

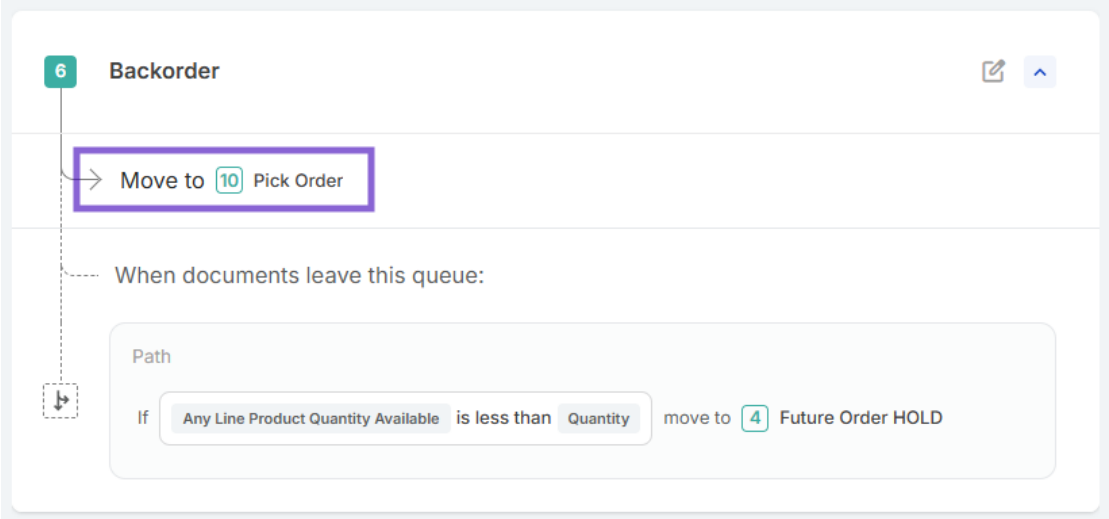
Actions can trigger when a document enters ("On Entry") or leaves ("On Exit") a workflow queue. These actions can automatically reserve inventory, send emails, capture payments, and more.

For a full list of Mission Control's currently supported workflow actions, refer to this documentation.



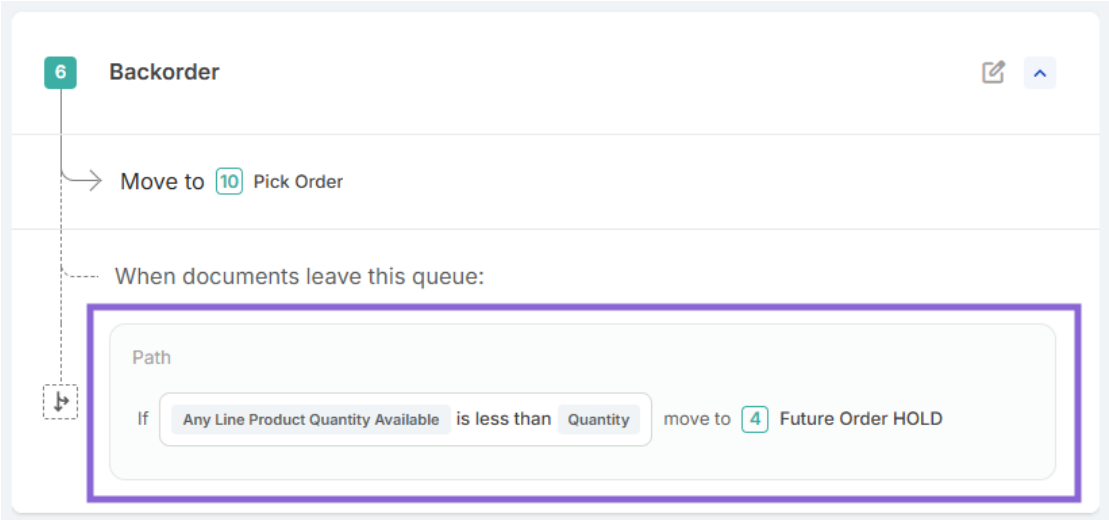
Primary Path

The primary path controls the default destination where documents will go when they leave this queue, as long as no alternate paths reroute the document elsewhere. If there are no alternate paths that could reroute documents, then all documents leaving this queue will follow the primary path.



Alternate Paths

Alternate paths reroute the document from the primary path based on certain conditions. These conditions can be based on a field from the order, the customer, a line item, or a line item's product, or a dimension from the order or a line item. More than one alternate path can be set up for the same queue, so documents can go to a variety of places based on their current state.

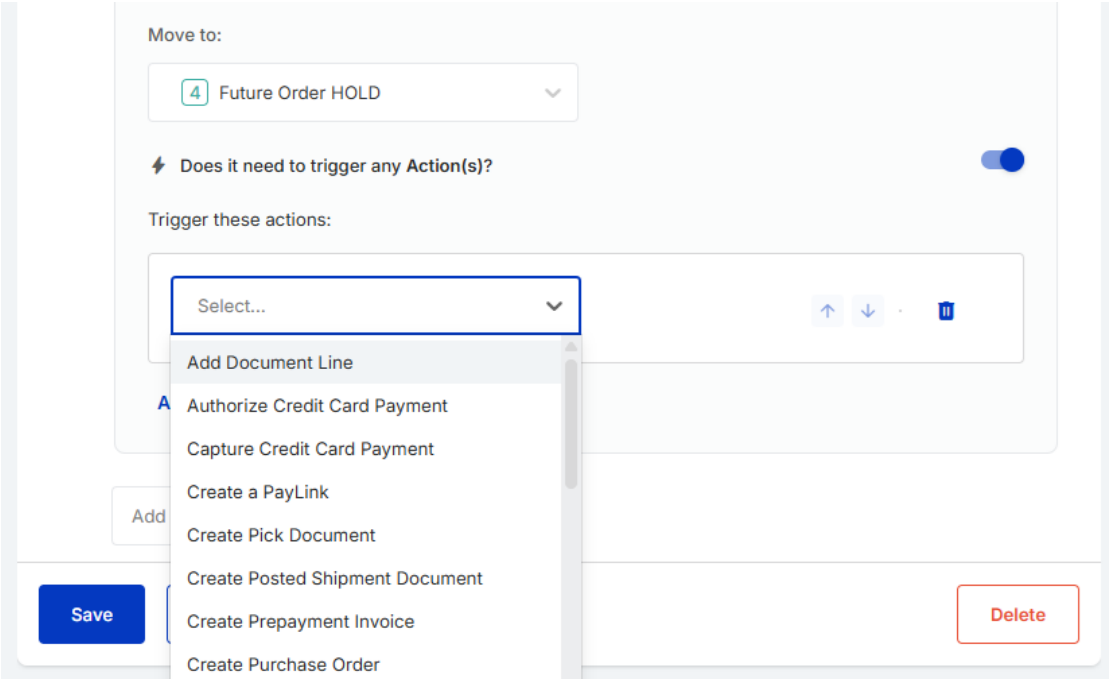


In the above example, if any of the lines' product's quantity available is less than the line's quantity, then the order will move to the Future Order HOLD queue instead of continuing to the Pick Order queue.

It is recommended to name each alternate path to help people understand its purpose at a glance, which helps streamline workflow maintenance.

Alternate Path Actions

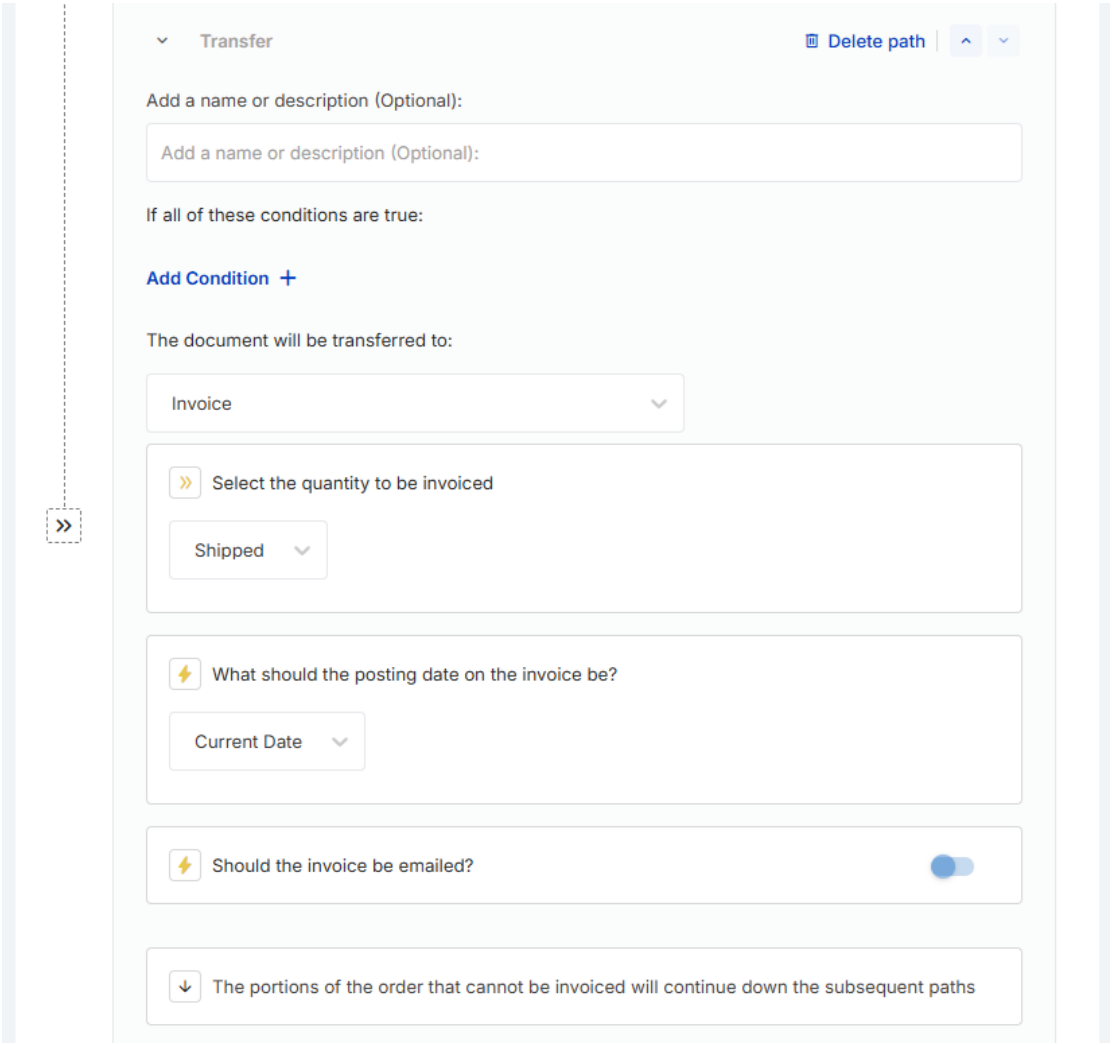
Actions on alternate paths only trigger for documents that meet the conditions to be rerouted down that path. To add one, click the "Add alternate path" button, then turn on "Does it need to trigger any Action(s)?". Select the action that should trigger when documents meet those conditions. Multiple actions can be added, and they will trigger in the listed sequence.



Alternate Path Transfers

Transfers on alternate paths only trigger for documents that meet the conditions to be rerouted down that path.

Documents can be transferred from quote to order, or from order to posted invoice. To add a transfer path, click the “Add alternate path” button, then select “Transfer”, and fill out all of the requested fields to control how the transfer will be processed. You can control the quantity to be invoiced, the invoice posting date, and automatic emails with attached reports.



Processing Order

Alternate paths process in order from top to bottom. Actions that are listed before alternate paths will process before the document is evaluated for moving through the following alternate path(s). This lets you set up more complex handling like running the same action for all the documents that leave the queue, then splitting off certain documents to a different path with a certain action, then running other actions for the documents that are left, and so on.

If documents should process actions without being moved to a different queue, simply keep the primary path as “Remain in this queue”. Any actions listed in the Alternate Paths section will still be processed for the given document.

Saving and Publishing

Changes to workflow queues must be saved by clicking the Save button at the bottom of the queue.

Once all workflow queue changes have been saved, click the “Publish Changes” button at the top right of the workflow edit screen. Doing so will immediately change how the workflow functions for users in the system, without any need to refresh their screens or log out and back in.

Any documents that are submitted to workflow after the changes are published will follow the new flow. Any documents that are currently open and being worked on will follow the latest saved version of the workflow.

Note: *There are no additional validation steps to publish a new/updated workflow.*

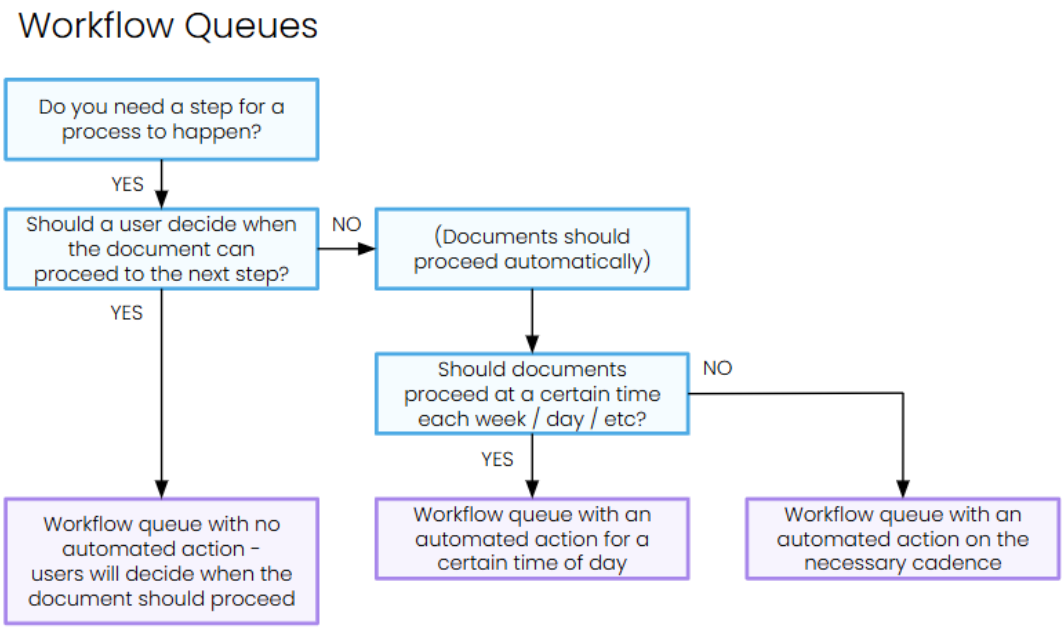
Only grant workflow update access to trusted members of the organization.

Configuration Decision Trees

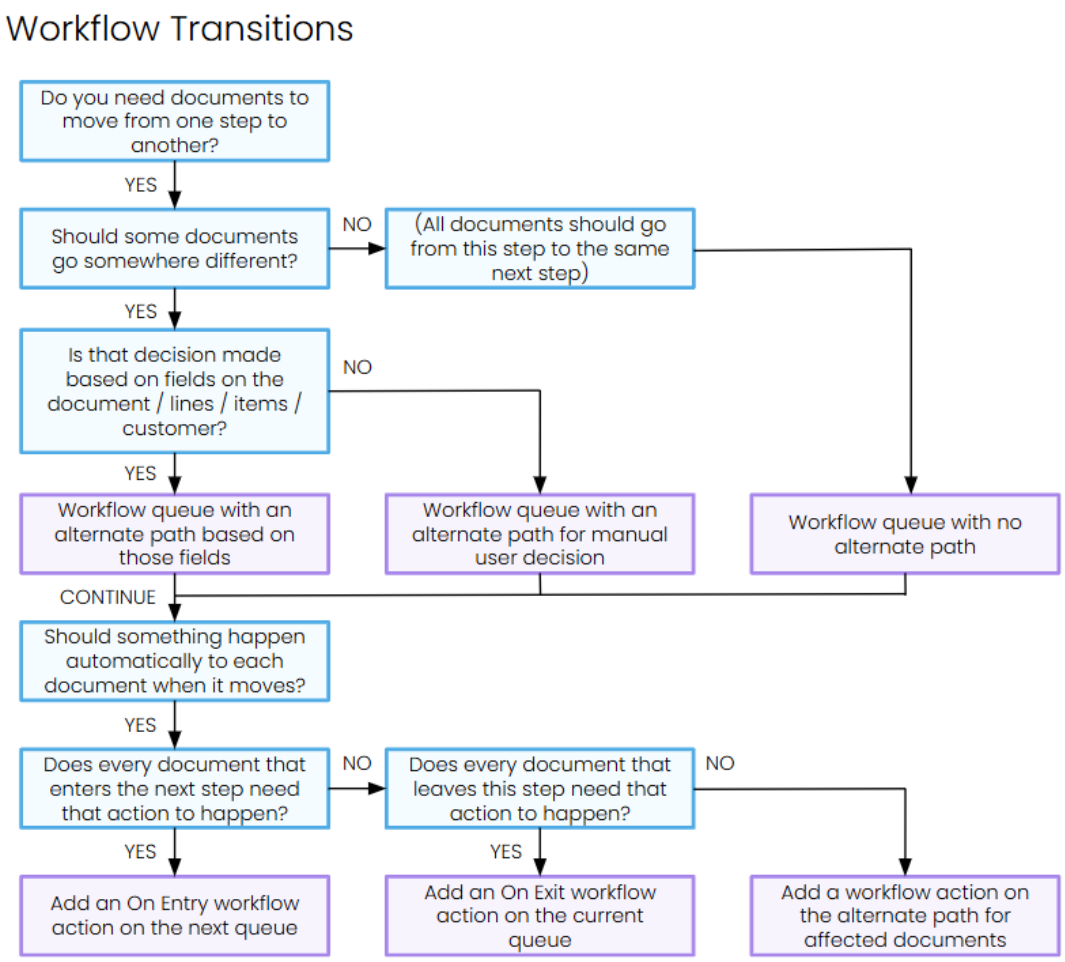
Use the following configuration flowcharts to determine how to set up different processes in workflow.

Ready to set up more complex automated processes like backorders, drop ships, future order holds, and reservation reassignments? Check out this documentation for step-by-step configuration that ties together workflow, automatic actions, and business rules.

Workflow Queues for Process Steps



Workflow Transitions for Process Movements



Business Rules for Field Validation

