Mission Control: Workflow Management

Megan De Freitas - 2024-11-25 - Mission Control Documentation

Cavallo’s Workflow is a robust, user-friendly document flow engine. Users can quickly and easily build out tailored, fully automated processes that will rapidly route sales orders through various queues. Business rules [link to other Support page here] can also be added to ensure that orders are meeting certain checks and adding value to the overall order management system.

Where to find the Workflow Editor

After clicking on the menu in the upper right hand corner, choose the Workflows option.

From here, the Workflows screen will appear. On this screen, there are four workflows that are included in the Cavallo Cloud app: Quote, Order, Invoice, and Return.

Each document type has its individual workflow that can be configured. Clicking the name will open up the working screen to allow for configuration and editing within the workflow setup screen.

Editing Queues

The workflow edit screen allows users to configure the details of a given workflow.

In the Queues list on the left, users can reorder the queues by clicking and holding the dots on the right hand side of a list item, then dragging and dropping it into a new position. Users can create new queues by clicking on “Add New Queue” and then following the prompt.

To the right of the Queues list, each workflow queue is broken out into its own drawer. To see what is triggered for each individual queue, click the caret button on the right side of the drawer to expand it. Expanding the drawer will give the user visibility into the configuration of the given queue.

Editing Conditions

With the queue either expanded or closed, click the edit button to edit the selected queue.

With the queue expanded:

- Actions can be added for when a document enters the queue.
- The primary path can be set for where the document should route to next.
- Alternate paths can be added as a document exits the queue.
- Additional actions can be added to the queue.
- Transfers can be configured for a document.

On Entry or On Exit Actions

Toggling on actions will enable configuring actions that should occur when a document enters or leaves a queue. These actions could include reserving inventory, sending emails, capturing payment, and more.

Primary Path

The primary path is the queue the document will route to after this queue if no alternate paths are taken based on the state of the document and the conditions set on the path. This can be changed to create customized routing for each document type to meet unique business needs.

Alternate Paths

Alternate paths can be created to route the document based on certain defined conditions. These conditions can be based on a field from the order, the customer, a line item, a line item’s product, a dimension from a line item, or a dimension from the order.

It is recommended to name each alternate path to help future users understand its purpose.

Once the condition has been set, select the queue that a document should route to if the condition has been satisfied. Routing will now be available on Documents and on Mission Control based on the main or alternate path. If necessary, additional alternate paths can be set by clicking the “Add alternative path” button, then selecting “Path”.

Example Alternate Path

Here is an example of an alternate path for the New Orders queue. On exit, orders should flow to the Warehouse queue, but if the customer does not have a default card to charge, the order is being routed to Customer Review.

Alternate Path - Actions

Adding an Action within the Alternate Path section will allow for actions to be performed on documents that are in the given queue.

To add one, click the “Add alternate path” button, then select “Action”.

This will bring up the action menu where the user can select from the same list of actions listed above in “Entry Actions”:

Alternate Path - Transfers

Adding a Transfer within the Alternate Path section will allow the user to transfer their documents automatically as they are processed within a given queue. Documents can only be transferred from Quote to Order, or from Order to Invoice.

To add a transfer path, click the “Add alternate path” button, then select “Transfer”.

After selecting Transfer, the user will need to fill out all of the following information to control how the transfer will be processed.

Processing Alternate Paths

Alternate paths will process in order from top to bottom. If there are actions that are listed before any alternate paths, they will process before the document is evaluated for moving through an alternate path.

If the desire is to have actions taken against the documents in a given queue without being moved to a different queue, simply keep the primary path as “Remain in this queue”, and any actions listed in the Alternate Paths section will be processed for the given document.

Saving Changes

As edits are completed on each individual queue, they will need to be saved by clicking the Save button:

Once all the workflow queue changes have been saved, click the “Publish Changes” button on the top right. Doing so will immediately make changes to how the workflow functions. There will be no need for any of the users to refresh their screens or log out to see these changes.

Any documents that are transitioned after the changes are published will follow the new flow. If there are any documents that are open and being worked on while changes are being made to the workflow, the document will follow the latest saved version of the workflow.

Note: *There are no additional validation steps to publish a new/updated workflow. With this in consideration, only grant access to update the workflow to trusted members of the organization.*

Business Rules

Business rules help ensure that documents are in the correct state before they are transitioned into another queue. In many cases, business rules are used to make sure that a document does not need any corrections or updates. They can also be used to add extra validation around any potential concerns for a given document, such as low margin.

Some examples of business rules that may be helpful are:

- Check for low margin on the document.
- Check for excessive discounts on a given line item.
- Check for any items that may be backordered.
- Check that all line items have been fulfilled before shipping.
- Check for any line item inconsistencies that could cause problems later in the process.

For more details on how to use Business Rules, please see this article.

Automatic Actions

Automatic Actions help ensure that documents are moved through the workflow if they meet the criteria listed in the given queue, which helps reduce manual checks and reviews. This gives business owners more confidence that their workflows are moving orders through the pipeline, and it provides greater control to the entire process flow.

Below is an example of how Automatic Actions can enhance the business process:

- Documents that are waiting on items that have been backordered sit in a Backorder Queue.
- On a regular interval, checks are made to see if the backordered inventory has been received by the warehouse and can therefore be allocated.
- When the inventory is logged into the system, the next run of the Automatic Action will
    - see the available inventory,
    - allocate those items to the orders that were waiting for them, and
    - then send them to the next queue so that they can be picked.

For more details on how to use Automatic Actions, please see this article.