SalesPad for BC - Overview

Product Development - 2026-11-24 - Overview

SalesPad for BC - Overview

SalesPad for BC is a suite of extensions from Cavallo that adds workflow, pricing, payment, and automation tools to Microsoft Dynamics 365 Business Central, built for distribution businesses. Every product runs inside BC, so your team keeps working in the screens they already use. Each product can be used on its own, and they are designed to work together.

Together, the suite helps you enforce your business rules on every order, automate the manual steps between order entry and invoicing, protect your margins, and see where every document stands. Mission Control is the center of the suite: its workflow engine connects the other products, so pricing, payments, printing, customer insights, and your own custom logic can run automatically as documents move through your process.

Each product also keeps its own record of what happened and why, through activity logs, price traces, audit logs, and event history. Whether an action was taken by a person or by workflow, you can always see who or what made a change.

Products in the SalesPad for BC Suite

- Mission Control: A no-code workflow engine that routes sales and service documents through your process, checks them against business rules, and automates tasks such as reservations, purchase orders, pick instructions, and invoicing.
- Advanced Pricing: Calculates sales line prices from customer contracts, pricing groups, and formulas, using the priority order you set instead of BC's lowest-price-wins rule.
- Smart Printing: Prints and emails the right documents for each order based on rules you define for the document, customer, and items.
- Profit Scan: Flags quotes and orders that fall below your target margins while they are still in progress, before they are invoiced.
- Customer IQ: Scores every active customer by value (ABCD segmentation) and likelihood to stop buying (churn risk), and shows those scores on customer cards and sales documents.
- Payment Processing: Authorizes, captures, and charges card payments and sends payment links for sales orders through Global Payments PayFabric.
- Scripting: Lets power users build their own validation and automation rules in a drag-and-drop script designer without paying for custom AL code development.
- Custom Fields: Adds unlimited extra fields to various entities like customers, sales and service documents, line items, and products.

How the Products Work Together

Each product adds value inside Business Central on its own. Paired with Mission Control, each one also becomes a step that can run automatically in your sales workflow. The sections below describe how each product connects to the rest of the suite.

How does Mission Control connect the suite?

Mission Control moves each quote, order, invoice, and return through a series of workflow queues that match your process. At each step, workflow can check business rules, send documents down different paths based on their details, and automatically trigger actions like generating purchase orders, pick instructions, and invoices. The other SalesPad products add their own actions and data to these workflows, so an order can be repriced, paid, printed, routed based on customer health, and updated by custom scripts without anyone stopping to do those steps by hand.

Mission Control also adds dashboards inside BC that show where every document is in the process, including documents waiting on approval. Because the other products feed into the same workflow, those dashboards and the Mission Control activity log give one view of everything that has happened to an order.

How does Advanced Pricing work with other SalesPad products?

Advanced Pricing adds configurable pricing rules that automatically apply to sales documents. With Mission Control, Advanced Pricing can reprice sales documents automatically as they move through workflow. This matters most for orders that wait on backorders, holds, or future ship dates: if costs change in the meantime, prices update using the same rules as manual order entry, recapturing margin before it’s lost. Repricing can be limited to certain orders so hard quotes and customer commitments stay as quoted. Every price change is recorded in the line's Price Trace, whether it happened manually or in workflow.

Advanced Pricing also provides actionability for the suite’s margin and customer tools. Mission Control business rules and Profit Scan targets catch orders whose margins fall short, and Customer IQ highlights 'D' customers whose negative margins may point to pricing that needs a second look. Advanced Pricing rules can then be updated to improve margin on current and future orders.

How does Smart Printing work with other SalesPad products?

On its own, Smart Printing narrows each manual print or email to the options that fit the current sales document. With Mission Control, printing and emailing can happen automatically as sales documents move through workflow. Order confirmations can email to the customer when an order is accepted, pick instructions can print at the warehouse step, packing slips can print at shipping, and shipment and tracking details can email to the customer at invoicing. Every document is sent at the right time in your process, automatically.

Custom Fields can be used for Smart Printing’s profile eligibility checks, so certain print and email options are available based on your custom fields. Each automated print and email is recorded in both the Smart Printing audit log and the Mission Control activity log.

How does Profit Scan work with other SalesPad products?

Profit Scan compares each in-progress quote and order to the margin targets you set and flags the ones that fall short. Margin targets can be set company-wide, then made more specific for certain items or item groups. Managers can review flagged documents, accept them with a reason, or email the sales rep about them, and every action is recorded in the document's event history. Profit Scan's margin status fields can be brought into Mission Control so workflow can route or hold orders based on whether they meet their margin targets.

How does Customer IQ work with other SalesPad products?

Customer IQ puts each customer's value and churn risk in front of your team on customer cards and sales documents in BC. With Mission Control, those same scores can drive workflow automatically. Orders from 'A' customers can go to a priority handling queue, orders from customers at elevated or high churn risk can go to a sales rep or manager for a personal check-in before they ship, and orders from 'D' customers can go to a review queue to check whether pricing or discounts need adjusting. This turns customer health from an afterthought into a tightly-integrated driver of value for your business and customers.

How does Payment Processing work with other SalesPad products?

Payment Processing lets your team take payments for sales orders inside BC. With Mission Control, payment steps become part of the workflow: orders can authorize the customer's card when they're entered, capture that payment before they go to the warehouse, take a full charge in one step, or send a payment link to the customer's billing email.

If a payment fails, the order is routed to a review queue instead of moving forward, so issues are caught before the order ships. Because payment status is available to Mission Control automations, orders waiting on payment can sit in a holding queue and continue automatically once they're paid.

How does Scripting work with other SalesPad products?

Scripting covers business rules that don't fit a standard setting without requiring custom code. Power users build scripts that check fields, update records, and block saves when data doesn't meet your requirements. With Mission Control, scripts can run automatically as documents move in workflow. For example, when quotes reach an approved queue, a script can combine all approved quotes for the same customer into one order for shared fulfillment. Workflow handles the steps unique to your process, while Mission Control manages routing, rules, and the rest of the automation. Scripting can also check and update Custom Fields.

How does Custom Fields work with other SalesPad products?

Custom Fields adds the data your business tracks that BC doesn't include by default, such as a priority customer flag or an expedite option on orders. In Mission Control, any of these fields can be used in workflow conditions, business rules, and automations, so you route documents and catch exceptions based on requirements that are unique to your business. Custom Fields also let you bring BC extension fields into your workflows so you can tailor processes and automations based on integrated third-party data.

Common Questions

Do I need Mission Control to use the other SalesPad products?

No. Advanced Pricing, Smart Printing, Profit Scan, Customer IQ, Custom Fields, and Scripting can each be purchased and used without Mission Control. Mission Control is required to run any of these products automatically as part of workflow.

Where do SalesPad products appear in Business Central?

Once installed, SalesPad products are grouped under a single SalesPad menu in Business Central, and their actions appear under a SalesPad category in each page's Actions menu. You can also find any product by searching in BC for its product name, "SalesPad", or "Cavallo".