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# Mission Control: Prepayment Invoices

Cavallo Support - 2025-08-04 - [Mission Control Documentation](#)

Cavallo supports generating Prepayment Invoices from Sales Orders. These invoices can be generated based on either a percent of the document total or a percent of each line item.

## Configuring Prepayment Invoices in Workflow

Using workflow in Cavallo, users can configure order workflows to handle the following scenarios:

- Route documents based on their prepayment status
- Generate prepayment invoices when an order enters a queue
- Generate prepayment invoices when a document is leaving a queue

### Route documents based on their prepayment status

Orders can be routed based on the prepayment status of the order, using the “Document Status” field.

An example of how this can be done is shown below. Select Alternate Path, then add the following condition:  
Field from the order > Document Status > Has any of > These statuses > Fully Prepaid

Does it have any Alternate Path(s)?

^ Fully Prepaid (Path) Delete path ↑ ↓

Add a name or description (Optional):

Fully Prepaid

If all of these conditions are true:

A field from the order ▼ Document Status ▼ Has any of ▼

These statuses ▼ Fully Prepaid X ▼

[Add Condition +](#)

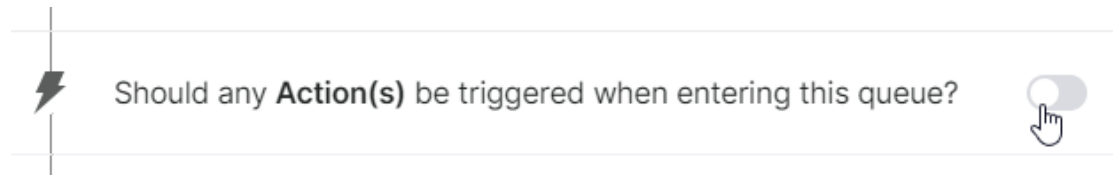
Move to:

5 Pick Package ▼

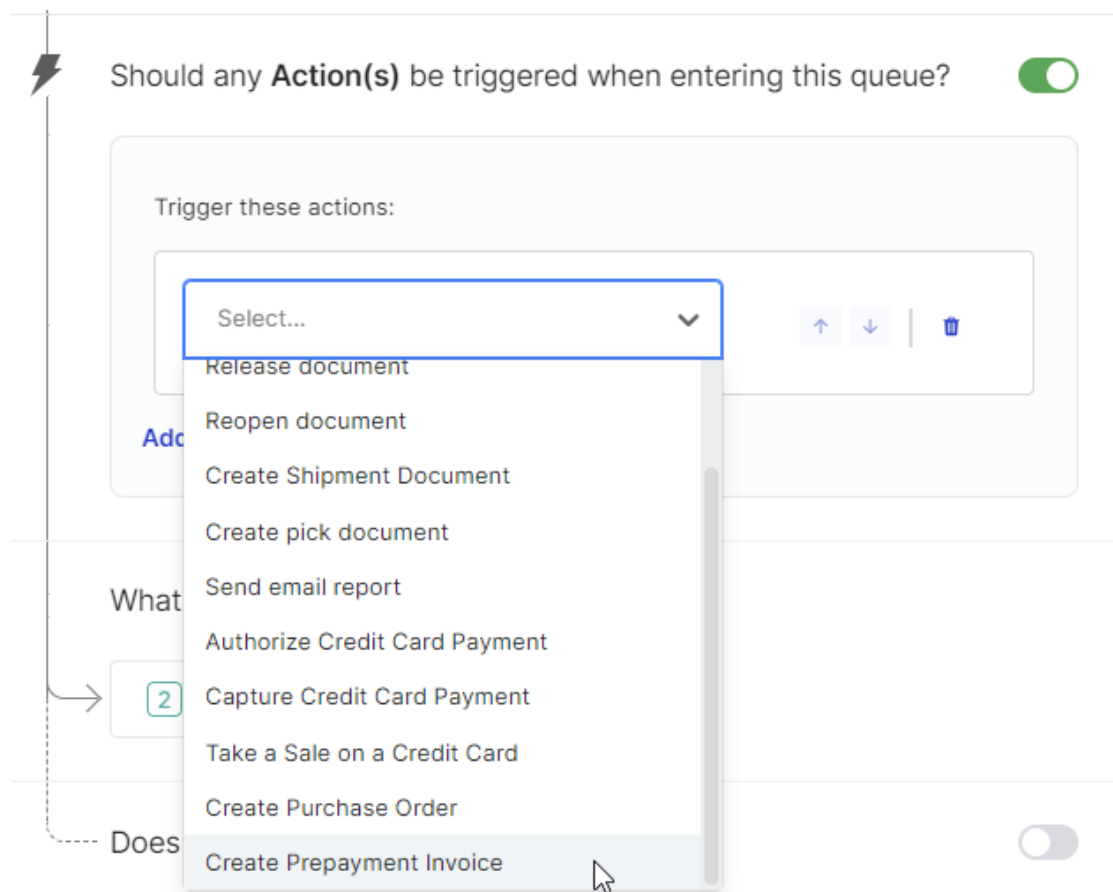
### Generate prepayment invoices when an order enters a queue

The ability to generate a prepayment invoice upon entering a workflow queue is a powerful tool. Allowing for the users to do so enables our users to accelerate their order entry workflow.

To access this powerful tool, navigate to the Order Workflow screen, once there open up the desired queue. Click the edit button and then click the toggle to add an action:



In the first dropdown, scroll down to the bottom of the list and select "Create Prepayment Invoice"



Select whether to create the prepayment invoice based on a percent of the line item or document subtotal. As a note, this percentage will be based on the value of what has been saved on the customer's profile.

Trigger these actions:

Create Prepayment Invoice
▼

📄 What should the prepayment amount be based on?

A percent of the line
▼

A percent of the line
▼

A percent of the document subtotal
▼

[Add more+](#)

Sending the prepayment invoice as an email attachment is also an option. This will follow the same format as sending a report.

⚡ Should the prepayment invoice be emailed?

Sales - Invoice
▼

US Sales Invoice - Blue
▼

Reply to Created By
x
▼

Send to Customer@ABCCompany.com
x
▼

CC to Select address, job title or internal user
▼

BCC to Select address, job title or internal user
▼

Once all of the details have been added, save the changes and then publish all of your workflow changes.

⚙️
Publish Changes

4 waiting for Payment
▼

Does it have any **Alternate Path(s)**?

Save

Cancel

Delete

### Generate prepayment invoices when a document is leaving a queue

Similar to the instructions above, open up the desired workflow queue and select the “Alternate Path” toggle and fill out the conditions that would trigger this action. In the example below, the system is looking for any

document that has a Prepayment % greater than 0.

Does it have any **Alternate Path(s)**?



Prepayment Invoice (Path) Delete path | ↑ ↓

Add a name or description (Optional):  
Prepayment Invoice

If all of these conditions are true:

A field from the order | Prepayment % | is more than | A certain percent | 0%

[Add Condition +](#)

Move to:  
Select Queue

**⚡ Does it need to trigger any Action(s)?** ☐

Toggle on the Actions section of the alternate path and fill out the required fields.

Does it have any **Alternate Path(s)**?



Prepayment Invoice (Path) Delete path | ↑ ↓

Add a name or description (Optional):  
Prepayment Invoice

If all of these conditions are true:

A field from the order | Prepayment % | is more than | A certain percent | 0%

[Add Condition +](#)

Move to:  
Select Queue

**⚡ Does it need to trigger any Action(s)?** ☑

Trigger these actions:

Create Prepayment Invoice ↑ ↓ | 🗑

What should the prepayment amount be based on?  
A percent of the document s...

Should the prepayment invoice be emailed? ☑

[Add more+](#)

Emailing the prepayment invoice can also be selected in the alternate path action.