



Mission Control: Prepayment Invoices

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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



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.



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



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



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.



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



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