Mission Control: Prepayment Invoices

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

Mission Control supports generating prepayment invoices for sales orders. Prepayment invoices can be generated based on either a percent of the document total or a percent of each line item, which uses BC's native fields for defining customer prepayment percentages. Orders can be checked for whether they are fully prepaid and routed in workflow accordingly, and automatically forwarded out of holding queues once they are fully prepaid.

Configuring Prepayment Invoices in Workflow

Sales order workflows can:

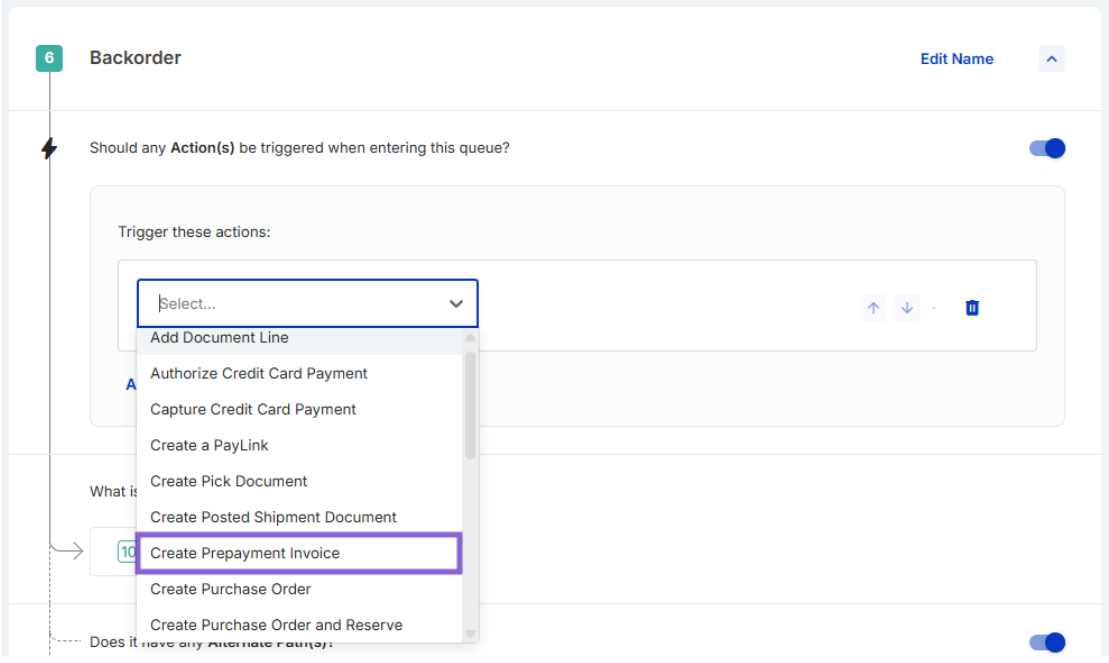
- Generate prepayment invoices when an order enters a queue
- Generate prepayment invoices when an order leaves a queue
- Route orders based on their prepayment status
- Automatically forward fully prepaid orders

Generate prepayment invoices when an order enters a queue

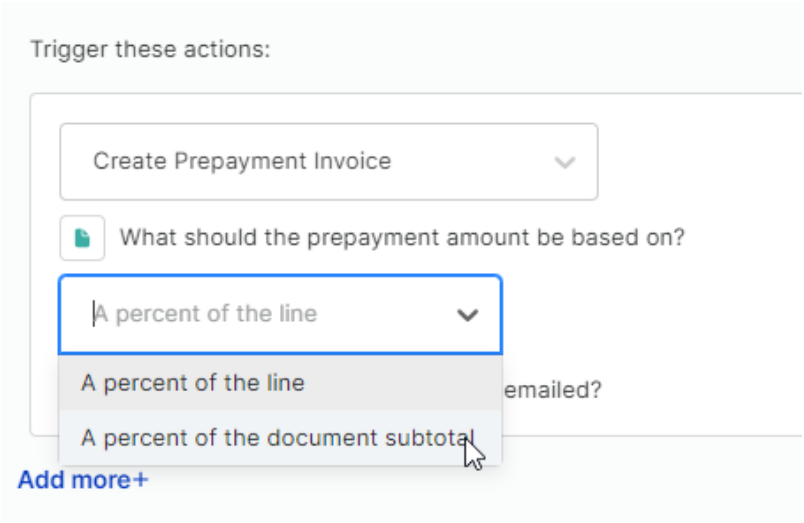
Prepayment invoices can be generated when orders enter certain workflow queues, ensuring that every order that goes into that queue has a prepayment invoice.

In Mission Control, on the Workflows screen, launch the Order workflow type and then select the queue that should generate prepayment invoices. Click the edit button and toggle on "Should any Action(s) be triggered when entering this queue?".

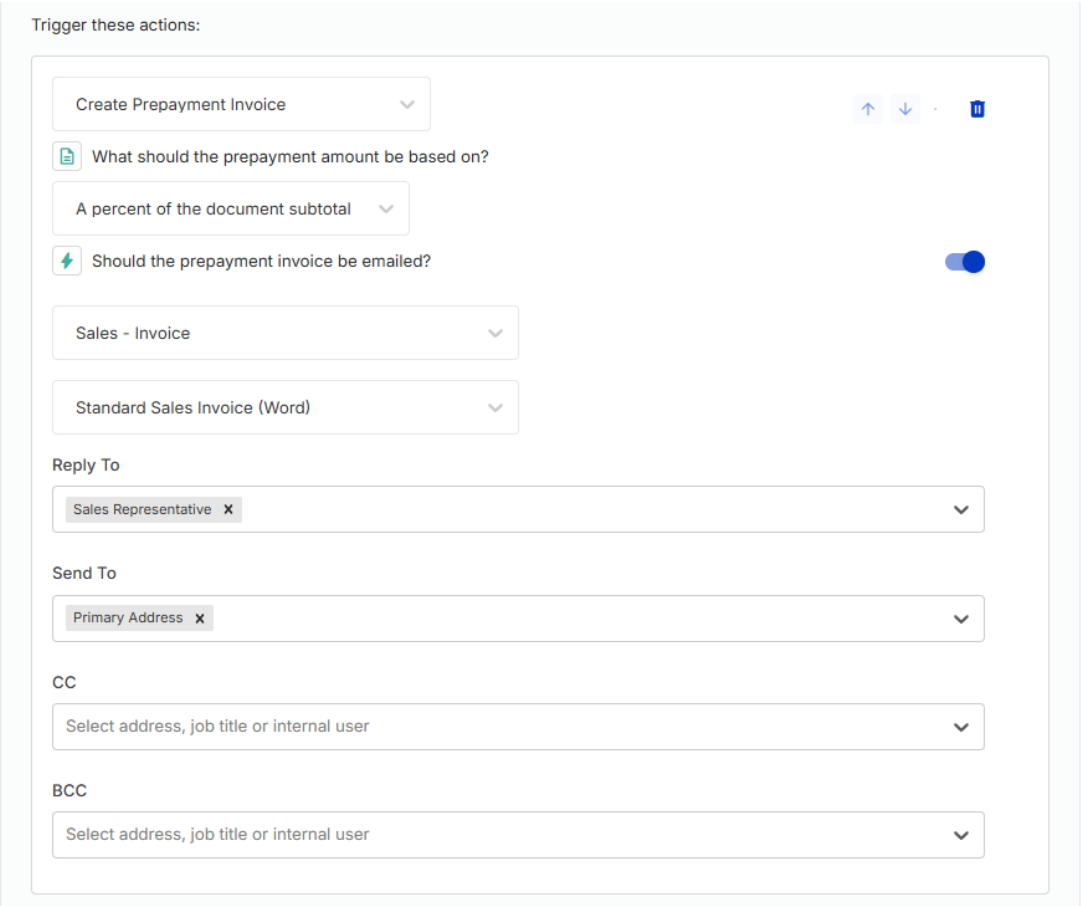
In the actions dropdown, select “Create Prepayment Invoice”.



Select whether to create the prepayment invoice based on a percent of the line item or document subtotal. The percentage used for each sales order will be based on that customer's profile.



A prepayment invoice report can be automatically emailed to specified contacts. Select the report, which email addresses should receive it, who will receive any responses from those contacts, and optionally add CC and BCC emails.



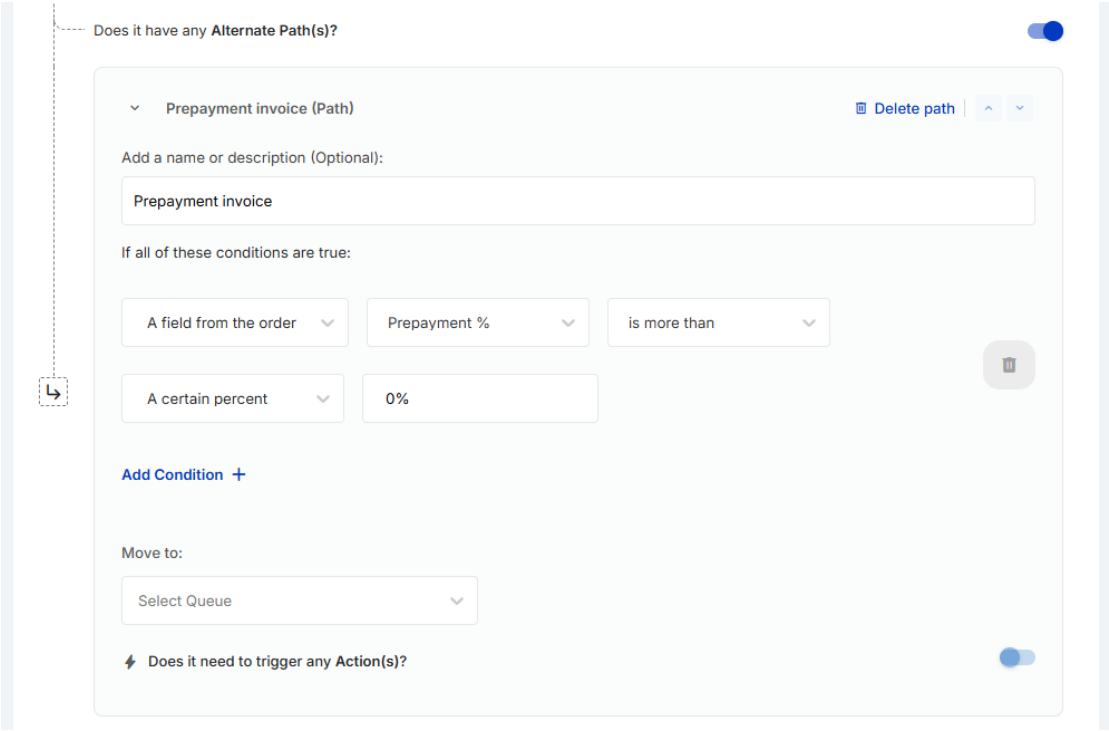
After the action is fully set up, remember to save and publish the workflow to update Business Central.

Generate prepayment invoices when a document is leaving a queue

Prepayment invoices can be generated when orders leave particular queues so that every order has a prepayment invoice before it continues to the next step. Because this is configured using alternate paths, conditions can also be added so that only specific orders generate prepayment invoices.

In Mission Control, on the Workflows screen, launch the Order workflow type and then select the queue that should generate prepayment invoices. Click the edit button and then toggle on "Does it have any Alternate Path(s)?".

Add any conditions to control which orders generate prepayment invoices. In the example below, any document that has a Prepayment % greater than 0 will trigger this path.



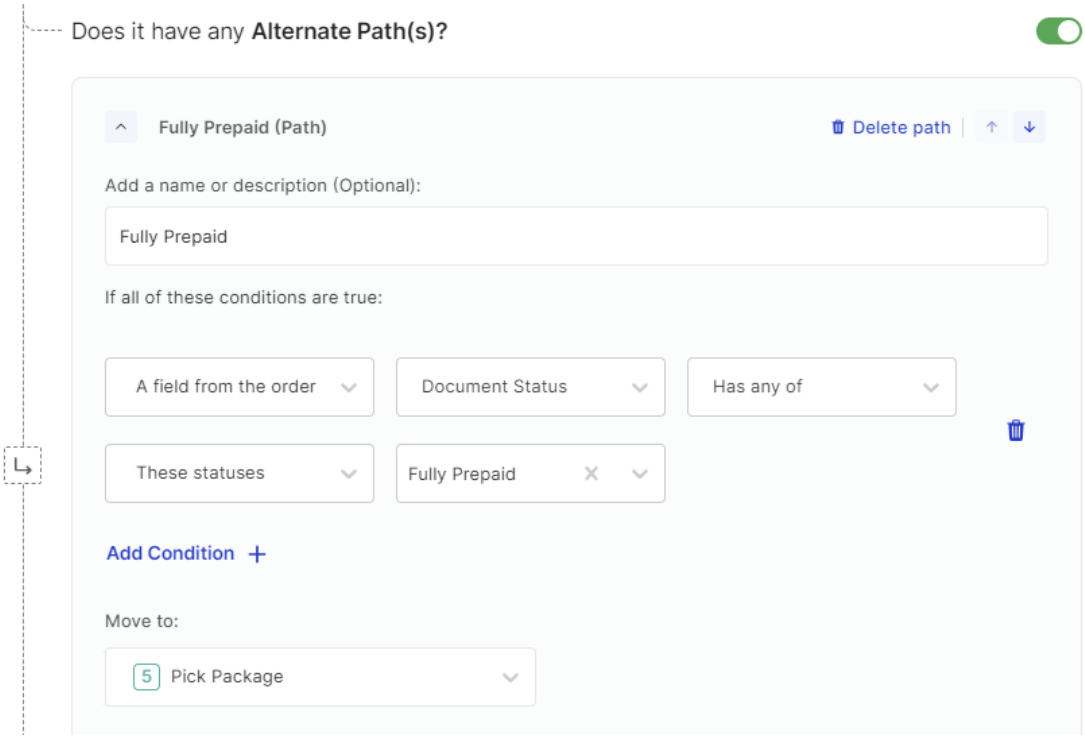
Toggle on "Does it need to trigger any Action(s)?", select the "Create Prepayment Invoice" action, and fill out its configuration details. This has all the same options as the entry action shown in the previous section.

After the action is fully set up, remember to save and publish the workflow to update Business Central.

Route documents based on their prepayment status

Orders can be routed in workflow based on their prepayment status. This ensures that orders are fully prepaid before they are allowed to continue in the process, and it helps capture any orders that had payment issues so they can be reviewed.

On any queue where prepaid orders should be checked, add an alternate path, then add the following condition: A field from the order > Document Status > Has any of > These statuses > Fully Prepaid. In this example, fully prepaid orders can continue to the Pick Package queue.



Automatically forward fully prepaid orders

If orders that need prepayments are waiting in a holding queue for those payments to be made, they can be automatically submitted through workflow once the payment is made so that people do not need to manually check and process those orders.

This can be accomplished with an automatic action. Check for that same Fully Prepaid document status, and set the action to run on a periodic schedule every 15 minutes so that it checks frequently for fully prepaid orders. Make sure to target the holding queue where these orders wait for payments, enable the automatic action, and then save and publish your changes to update Business Central.

New Automatic Action

↳ Documents will be **submitted to the next queue** when the automatic action executes.

Which **Condition(s)** trigger this automatic action?

A field from the order | Document Status | Has all of

These statuses | Fully Prepaid

Add Condition +

Evaluation Policy

Periodic

Check for condition(s) every 15 minutes

Which **queues** should this automatic action apply to?

Future Order HOLD

Enable automatic action.

Cancel Save