

# Create An Order From An Opportunity Record

The create an order method is essentially a streamlined way of creating a manual order in Infusionsoft. It generates an unpaid order record based on the product/subscription program interest recorded in the opportunity record (including products, payment terms, and discounts.) After the order is created, the sales rep manually records the customer's credit card payment or sends an invoice requesting payment. This method is less automated, but can be more immediate. If the customer is ready to buy and pay by credit card right away, this method reduces the risk of losing the sale because the customer does not complete the shopping cart purchase process. The create an order method will trigger purchase actions once the order payment is recorded, if you have configured the system to do so.

1. Attach products, subscriptions, and / or product interest bundles to an opportunity and add applicable discounts, payment plans, and time limits.

The screenshot displays the 'Interests' section of an Infusionsoft interface. On the left, there are labels for 'Product', 'Subscription Plan', and 'Bundle'. To the right, a search box contains the text 'kit'. A dropdown menu is open, showing four options: 'Basic Water Testing Kit', 'Deluxe Water Test Kit', 'Pro Water Test Kit', and 'Calcium Hardness Kit'. The 'Calcium Hardness Kit' option is highlighted. To the right of the search box and dropdown, there are two red 'X' marks. Below the search box, there is a table with the following columns: 'Products', 'Price', 'Qty', 'Subtotal', 'Discount %', and 'Total'. The table currently displays 'No Product Interests'.

2. Select **Create an Order** from the opportunity actions.

Project Revenue: \$0.00

Created: Ma  
Last Updated: Ma

## Tasks & Appointments

*This contact does not have any tasks or appointments*

3. Select a credit card on file, and click the **Add** button to enter a new one, or leave the credit card field blank to create an unpaid order. Click on the **Process** button to create the Order.

## Create an Order

### Create an Order

This will create a single Order for all product interests and a separate Subscription for each subscription plan interest.

Credit Card:

**Unpaid Order:** If this is an unpaid order, the Sales Rep will need to manually send an Invoice to request payment. If it is a paid order, this may happen automatically, if your system is set up to Email Invoice Upon Successful Payment.