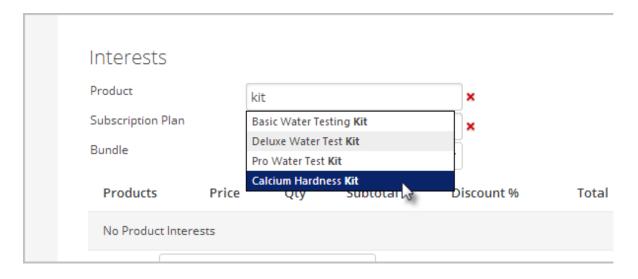
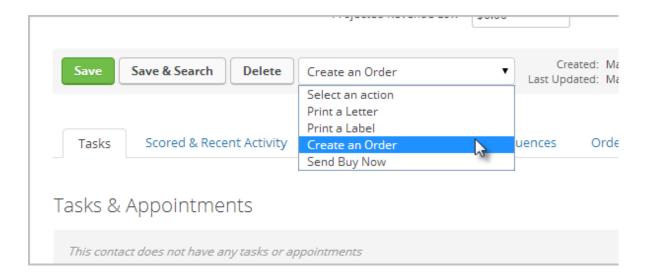
Create An Order From An Opportunity Record %

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 action s once the order payment is recorded, if you have configured the system to do so.

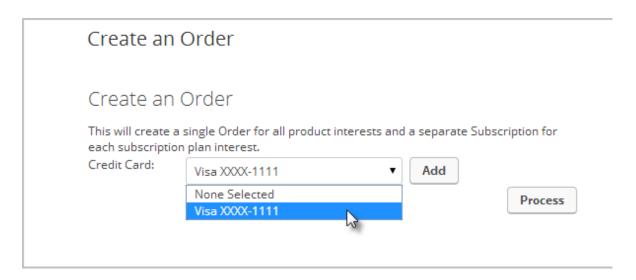
1. Attach products, subscriptions, and / or product interest bundles to an opportunity and add applicable discounts, payment plans, and time limits.



2. Select Create an Order from the opportunity actions.



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.



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.