Campaign Sequence - create orders

The "create order" sequence automates the order-to-invoice process, enabling you to integrate yet another aspect of your business. You can add products, set up payment options, and preview and edit the invoice before it sends.

How to configure the "Create order" process



1. Drag the "Create Order" process onto the canvas

2. Double click to configure

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Add products to the order

1. Click "+Add Products"



2. From the search located on the left type the name of the existing product

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🔎 men	×	
Create Product "men"		
Men's thin tie		
5		

or type the name of a new product and create it on the spot

Product Name	Pr
	No re
Men's wide tie Create Product "men's wide tie"	

3. Click "Add" in the bottom right



Auto pay payment option

• The "Auto Charge" payment option will not send the email template in the "Create order" process





• Instead the receipt email is sent. This is located through "E-Commerce > Settings > Orders & Quotes" and then scroll to the bottom



Edit text for payable Invoice email

This section is used only if an invoice payment option is selected

• Select either "Send payable invoice" or "Send invoice without payment option"

Payment	t Options
۲	Auto Charge this Order (If no credit card is found, an order with a balance due will b
0	Send Payable Invoice
0	Send Invoice without Payment Option
From	amanda.madsen@alwayshelpful.org
Subject	Here is your involce

• Edit the text that will be sent in the email containing their invoice

Hi ~ <u>Contact.FirstName</u> ~, Your invoice for ~Invoice.Total~ is ready to be viewed. I hope you e	Top of email
View my Invoice	
Amanda <u>Madsen</u> Media <u>amanda.madsen@alwayshelpful.org</u> (414) 399-9899 - Mobile	
Bottom of email	

How to make your "Create order" process and sequence "Ready"

1. When done change both "Create order" process and the sequence "Ready"

	Saved	at 11:46 AM	Edit	Reporting	Draft
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2. Slide the "Draft" to "Ready"

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← Create Order					Saved of 11:35 AM	Edit Reporting	Draft 🕕
	Add your Products			+ Add P	roducts		
	Product Name	Product Price	Qty	Total Amount			
	Men's thin tie	\$50.00	1	\$50.00			L2
			Total:	\$50.00			
	Payment Options	er with a balance due will be create	d)				
	Send Payable Invoice Send Invoice without Payment Option						
	From amanda.madsen@alwayshelpful.org						
	Subject Here is your involce						
	Hi ~Contact.FirstName~.						
	Your invoice for ~Invoice.Total~ is ready to be v	iewed.					
		View my Invoice					
	Amanda Madsen						

Note: If either the "Create order" process or the sequence is left in "Draft" it will not be published

Q: Can I upload a company logo from here?

A: No, you'll need to update your invoice logo in the Branding Center > Logos section of the product.