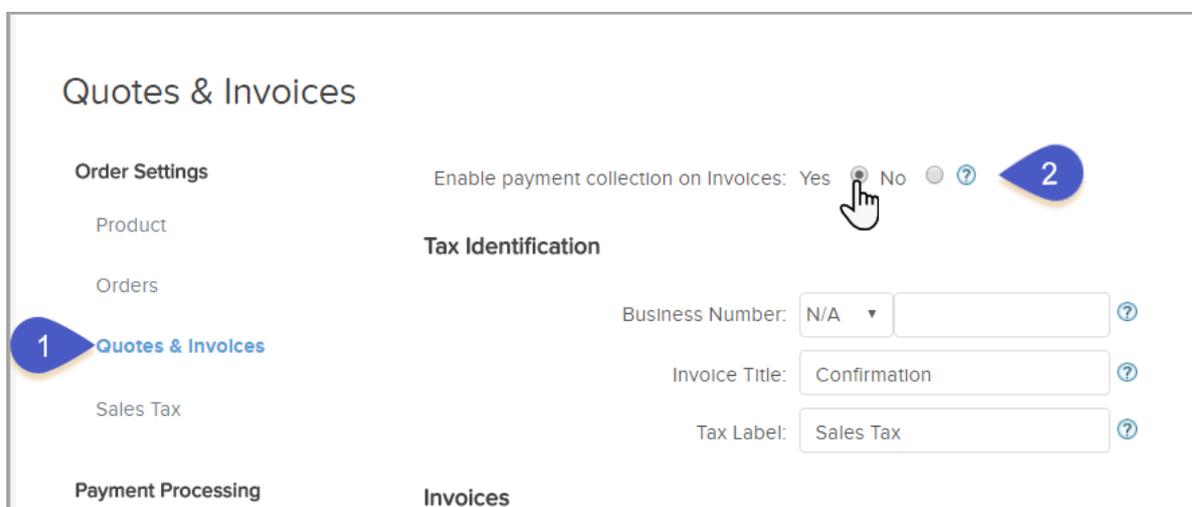


# Setup Payment Collection Invoice

## Enable payment collection on Invoices

The invoices will work with all order types: online orders, unpaid orders, or manual orders. To enable this feature:

1. Go to **E-Commerce > Settings**
2. Click on **Orders**
3. Under the *Invoice* section, you will see a new setting allowing you to enable this new feature.



4. Click **Save**

As an example, we'll show you the workflow of sending an invoice from a manual order.

When you are ready to send the invoice from a manual order, click the **Send Invoice** button at the bottom of the order record and follow the instructions below:

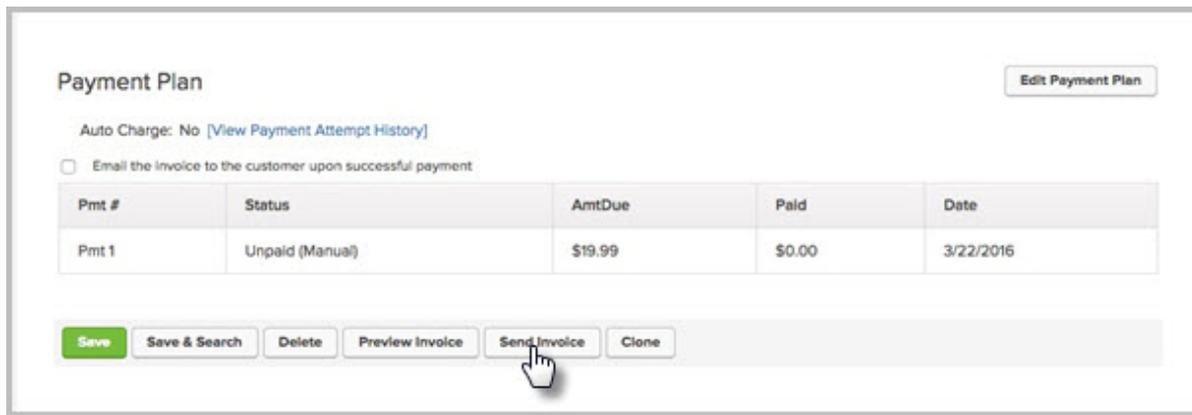
**Payment Plan** Edit Payment Plan

Auto Charge: No [\[View Payment Attempt History\]](#)

Email the invoice to the customer upon successful payment

Pmt #	Status	AmtDue	Paid	Date
Pmt 1	Unpaid (Manual)	\$19.99	\$0.00	3/22/2016

Save Save & Search Delete Preview Invoice Send Invoice Clone



1. **Payment Options:** Choose whether to send the invoice with or without an online payment option.

## Email Invoice to Contact

### Payment Options

- Send Invoice with payment option
- Send Invoice without payment option

To

Subject

*Specialized*   
**CONSULTING**

Hi Mr. Invoices,

Your Invoice for \$105.25 is ready to be viewed.

[View My Invoice](#)

Mr. Invoice

mr.invoice@email.com

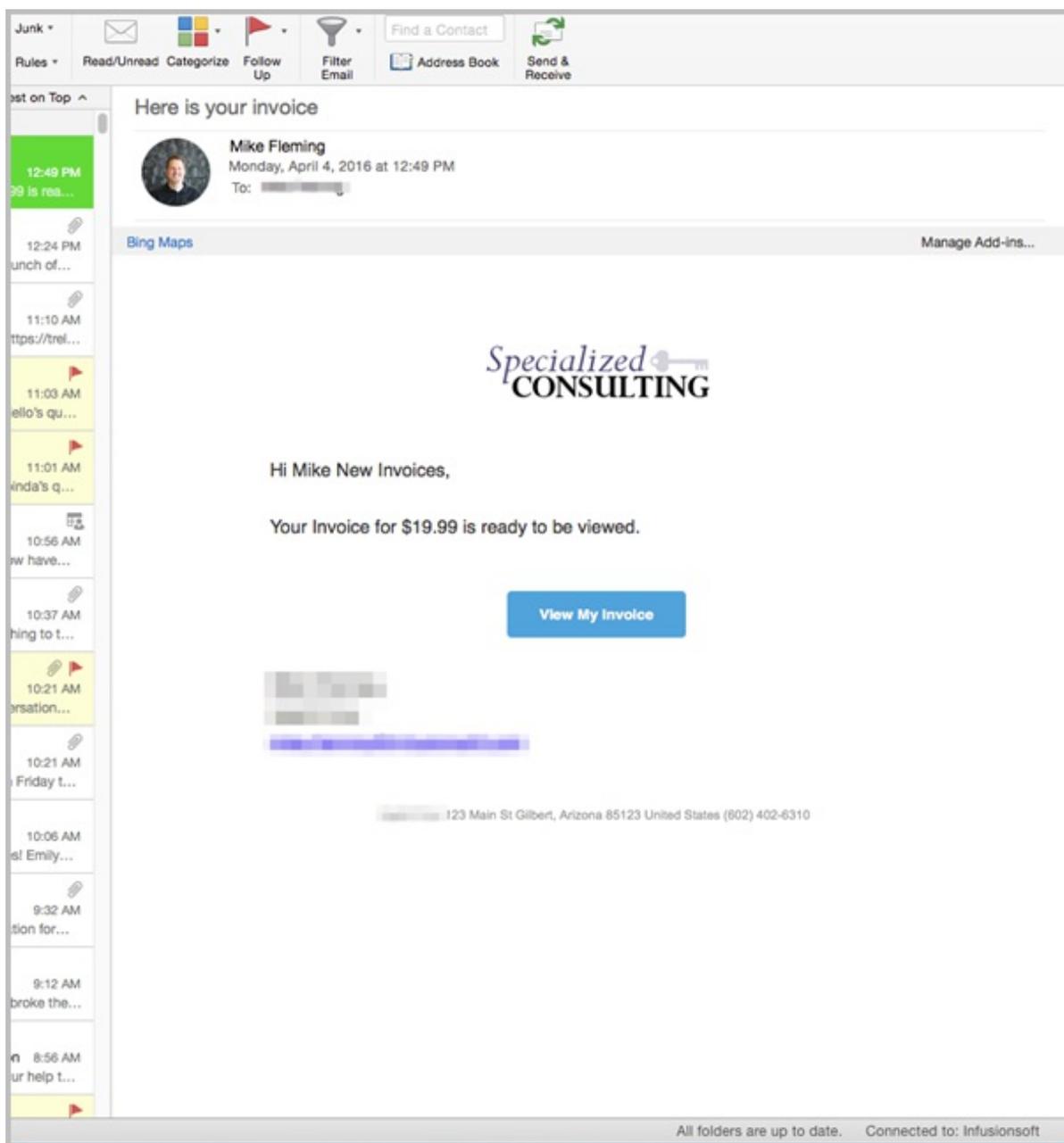
[Send Invoice](#)

2. Modify the To and Subject line if you wish.

3. Edit the open text fields

Pro Tip: The logo is pulled from Nav > Admin > Branding Center > Logo Tab > External Pages Logo

4. Click **Send Invoice**
5. Your customer will receive the invoice email with a button labeled, **View my Invoice**. They can view the invoice and its current status (paid or unpaid) at any time in the future.



6. At the bottom of the online invoice, there will be an option to **pay now**.

## INVOICE FROM INFUSIONSOFT

**Due \$19.99**

123 Main St  
Gilbert, Arizona 85123  
United States

*Specialized*   
**CONSULTING**

Mike New Invoices  
Invoice # 19  
March 22, 2016

ITEM	QTY	TOTAL
Red Velvet Cupcake Red velvet cupcakes are the best because they're red and have hearts on top.	1	\$2.00
Super Chocolatey Chocolate Cupcake with Chocolates Chocolate cupcakes are our bestseller. Only 840 calories each. Yum!	1	\$2.99
Lemon Cupcake Lemon cupcakes are extra yummy and have cream cheese frosting and a candy lemon wedge on top.	1	\$24.00
Lemon Cupcake Free Trial	1	-\$24.00
Cupcake of the Month Club A gift they'll never forget! Each month we'll deliver a delicious selection of twelve gourmet cupcak	1	\$15.00
<b>UPCOMING PAYMENTS</b>		<b>TOTAL</b>
3/22/2016		\$19.99
	<b>INVOICE TOTAL</b>	\$19.99
	<b>OUTSTANDING BALANCE</b>	\$19.99
	<b>DUE</b>	<b>\$19.99</b>

Print

Pay Now

7. Your customer will enter their payment information and click **Submit**.



Due Now: \$19.99

**PAYMENT INFORMATION**

MasterCard	* Credit Card Number
01	2016

**BILLING INFORMATION**  Use same for shipping

Mike	New Invoices
1260 S. Spectrum Blvd	
Address - Line 2	
Chandler	Arizona
85286	United States

Cancel Submit

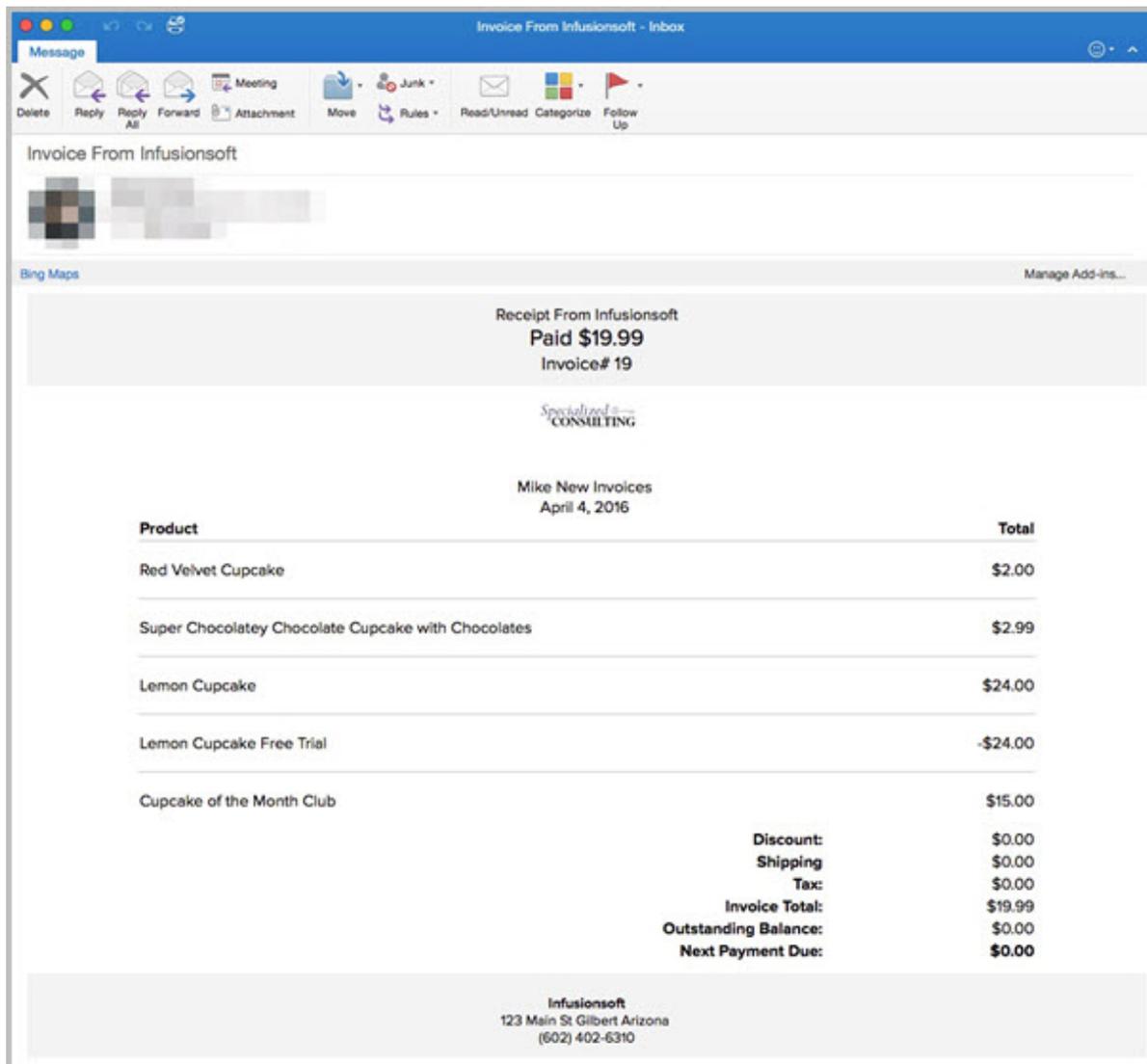
8. Upon successful payment, your customer will be redirected to an "Invoice Paid" success page.



## Invoice Paid

Thank you! Your Invoice has been paid. You will receive a receipt.

9. Your customer will then receive an order receipt.



### Pro-Tips!

- Invoice templates are mobile responsive, meaning they will maintain a professional look on all devices - like phones and tablets.
- Invoice emails will only allow you to edit the open text fields.
- For a **Receipt** to be sent you must enable it under E-Commerce > Settings > Orders > "Email receipts/invoices upon successful payment?"

## Invoice - Default Fields

There are options available that will allow you to save default fields for Invoices and Receipts.

You can create and save:

- Default "From" Email Address
- Default Email Subject
- Default Email Body
- Default Email Closing
- Terms & Conditions

**Invoices**

Default From Email Address:

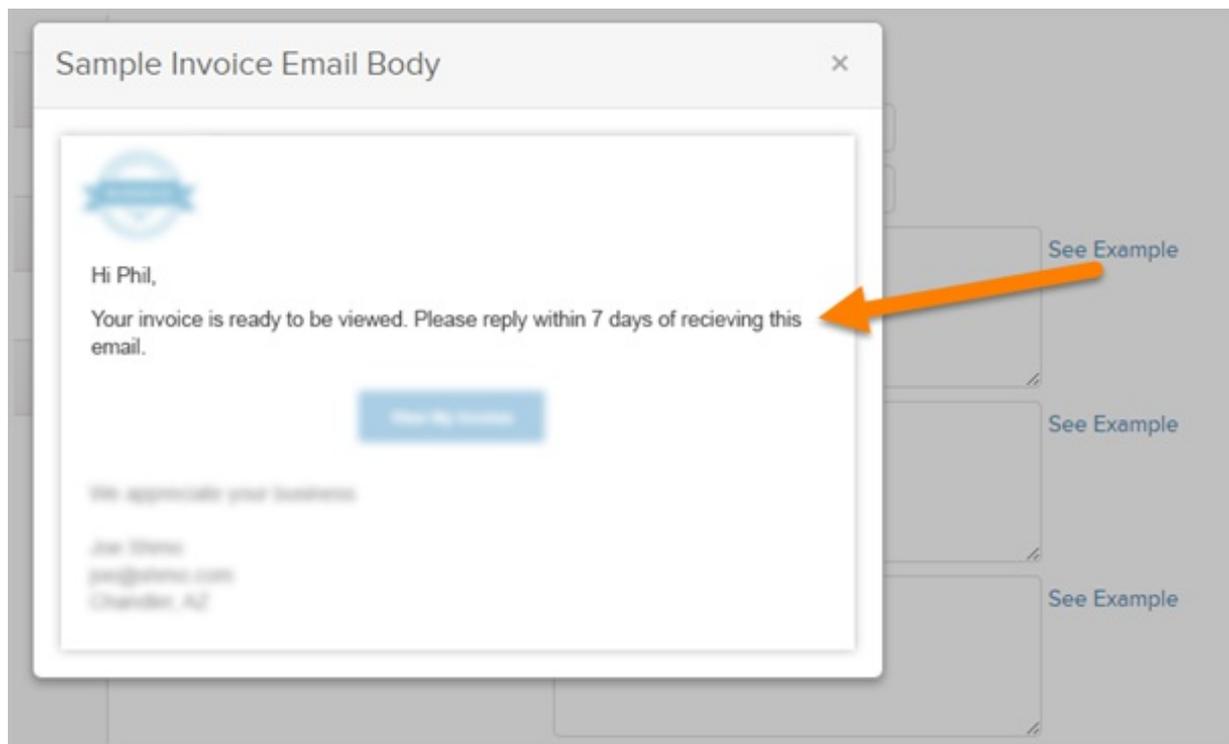
Default Email Subject:

Default Email Body:  [See Example](#)  
\*Supports plain text only

Default Email Closing:  [See Example](#)  
This section can be used for additional content and/or global signatures. If left blank, this section will default to the user's signature. \*Supports plain text only

Terms and Conditions on Invoice Page:  [See Example](#)  
\*Supports plain text only

Click on the **See Example** link next to a section to see where it lies on the Invoice or Quote



## Invoice - International Tax Settings

As an international customer, you can use Infusionsoft Invoices AND be compliant with your government's invoice tax requirements. There is a setting to add your tax identification requirements.

Enable payment collection on Invoices: Yes  No  [?](#)

**Tax Identification**

Business Number: VAT  [?](#)

Invoice Title: Tax Invoice [?](#)

Tax Label: VAT [?](#)

**Invoices**

Available Business Number tax type options:

- ABN
- BN
- EIN

- VAT

Invoice Title and Tax Label will automatically update based on your selected Business Number tax type. However, these fields are editable so you can customize to your specifications as needed.

Legal Requirements for Reference:

- Australia / New Zealand
- United Kingdom
- Canada
- US



**Tax Invoice**  
July 14, 2016

<b>ACMESOFT</b> <a href="http://www.theverge.com/">http://www.theverge.com/</a> 123 Main St Gilbert, Arizona 85123 United States (602) 402-6310	<b>INVOICE #</b> 55  <b>BILLED TO JOHN WILKINSON</b> 1234 Stratum St London, ME7 9AA United Kingdom
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ITEM	QTY	UNIT PRICE	TOTAL
<b>Chocolate Cake</b>	1	£19.00	£19.00

UPCOMING PAYMENTS	TOTAL
7/14/2016	£20.90

VAT	£1.90
<b>INVOICE TOTAL</b>	<b>£20.90</b>
<b>OUTSTANDING BALANCE</b>	<b>£20.90</b>
<b>PAYMENT DUE TODAY</b>	<b>£20.90</b>

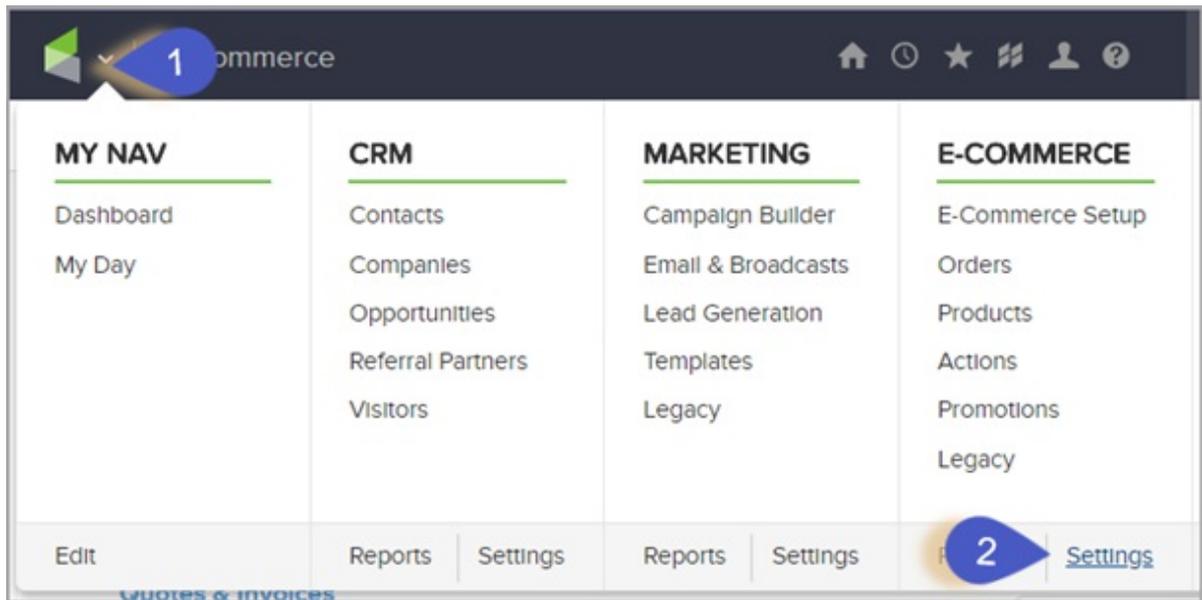
The total price includes VAT

These are my terms and conditions.

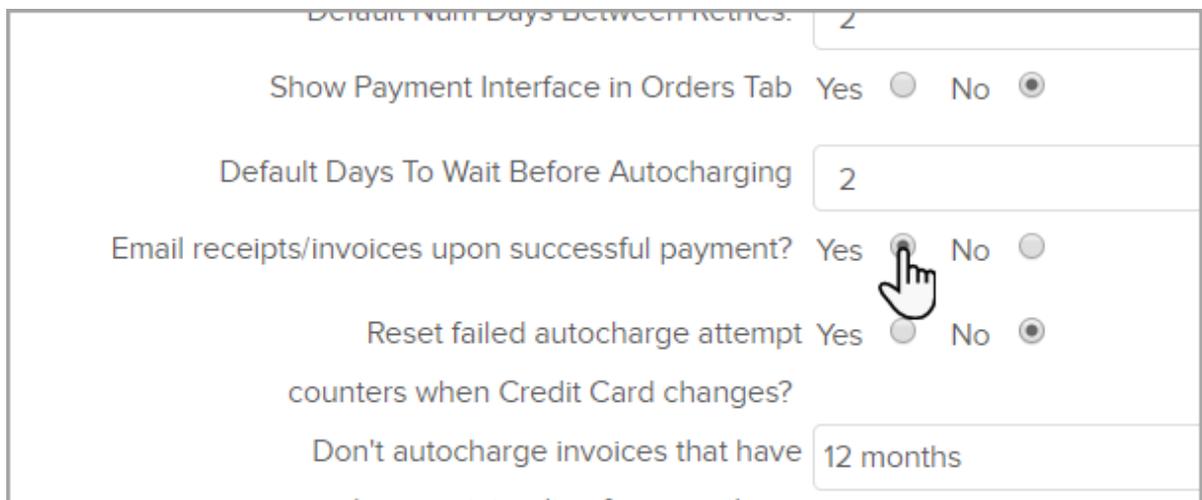
## Receipts

There are a couple settings that will trigger a Receipt when a purchase is made. When an order is paid for through an invoice a receipt can be sent confirming payment.

1. Go to E-Commerce > Settings > Orders



2. Check Yes next to "Email receipts/invoices upon successful payment?"



3. This will then send this Receipt when a payment is made through an Invoice.

