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.

Quotes & Invoices			
Order Settings	Enable payment collection on Invoices:	Yes 🕐 No 🔍 💿 🥥	
Product	Tax Identification	4	
Orders			
Quotes & Involces	Business Number:	N/A •	0
Cales Tax	Invoice Title:	Confirmation	0
Sdles Idx	Tax Label:	Sales Tax	0
Payment Processing	Invoices		

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:

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

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

Payment	Options
0	Send involce with payment option
0	Send invoice without payment option
То	mr.invoice@email.com
Subject	Here is your invoice
Hi Mr.	Specialized CONSULTING
Hi Mr. Your In	Invoices, notice for \$105.25 is ready to be viewed.
Hi Mr. Your In	Invoices, nvoice for \$105.25 is ready to be viewed.
Hi Mr. Your In Mr. Inv mr.inv	Invoices, nvoice for \$105.25 is ready to be viewed. View My Involce

- 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**.

_		
Due	\$19.99	
12: Gilbert, / Uni	3 Main St Arizona 85123 ted States	
Speci	alized and subscriptions and s	
Mike M Inv Marc	New Invoices oice # 19 h 22, 2016	
ITEM	QTY	тота
Red Velvet Cupcake	1	\$2.00
Red velvet cupcakes are the best because they're re	ed and have hearts on top.	
Super Chocolatey Chocolate Cupcake with Chocolate	es 1	\$2.99
Chocolate cupcakes are our bestseller. Only 840 cal	lories each. Yum!	
Lemon Cupcake	1	\$24.00
Lemon cupcakes are extra yummy and have cream	cheese frosting and a candy lemon wedge on	top.
Lemon Cupcake Free Trial	1	-\$24.00
	1	\$15.00
Cupcake of the Month Club		
Cupcake of the Month Club A gift they'll never forget! Each month we'll deliver a	delicious selection of twelve gourmet cupcak	
Cupcake of the Month Club A gift they'll never forget! Each month we'll deliver a UPCOMING PAYMENTS	delicious selection of twelve gourmet cupcak	тота
Cupcake of the Month Club A gift they'll never forget! Each month we'll deliver a UPCOMING PAYMENTS 3/22/2016	delicious selection of twelve gourmet cupcak	TOTA \$19.99
Cupcake of the Month Club A gift they'll never forget! Each month we'll deliver a UPCOMING PAYMENTS 3/22/2016	delicious selection of twelve gourmet cupcak	TOTA \$19.99 \$19.99
Cupcake of the Month Club A gift they'll never forget! Each month we'll deliver a UPCOMING PAYMENTS 3/22/2016	delicious selection of twelve gourmet cupcak INVOICE TOTAL OUTSTANDING BALANCE	TOTA \$19.99 \$19.99 \$19.99

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

J

AYMENT INFORMATION			
MasterCard	•	* Credit Card Number	0
01 • 2016 •			
1260 S. Spectrum Blvd Address - Line 2			
Chandler		Arizona	
85286		United States	

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

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

9. Your customer will then receive an order receipt.

ତ୍ତି ଓ ସାର୍ଟ୍ଟି Invoice From Infusionsoft - Inbox	<u>e</u>
🗙 😥 😥 🖾 Meeting 📑 - 🖏 Junk - 🖂 📑 - 🕨 -	Markin Markin
Delete Reply Reply Forward Attachment Move C Rules - Read/Unread Categorize Follow	
Invoice From Infusionsoft	
AND DESCRIPTION OF A DE	
	Manager Anto Inc.
Bing Maps	Manage Add-Ins
Receipt From Infusionsoft	
Paid \$19,99	
Special TING	
Mike New Invoices	
April 4, 2016	
Product	Total
Red Velvet Cupcake	\$2.00
Super Chocolatey Chocolate Cupcake with Chocolates	\$2.99
Lemon Cupcake	\$24.00
Lemon Cupcake Free Trial	-\$24.00
Cupcake of the Month Club	\$15.00
Discount	\$0.00
Shipping	\$0.00
Tax:	\$0.00
Invoice Total:	\$19.99
Outstanding Balance:	\$0.00
Next Payment Due:	\$0.00
linfusionsoft 123 Main St Gilbert Arizona (602) 402-6310	

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 enabled 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

Default From Email Address:	default_email@email.com	
Default Email Subject:	Default Subject	
Default Email Body: "Supports plain text only	You have a quote.	See Example
	Check it out!	
Default Email Closing: This section can be used for additional content	Thank you for your business.	See Example
and/or global signatures. If left blank, this section will default to the user's signature. "Supports plain text only	Joe Business 555-7896	4
Terms and Conditions on Invoice Page: "Supports plain text only	These are my terms and conditions.	See Example

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

ample Invoice Email Body		×	
Hi Phil, Your invoice is ready to be viewed. Plea email.	ase reply within 7 days o	f recieving this	See Example
			See Example
Jan Shena per@etens.com Chandler, A2			See Example

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 T	0		
Invoice Title:	Tax Invoice	0		
Tax Label:	VAT	0		
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:

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



Tax Invoice July 14, 2016

ACMESOFT http://www.theverge.com/ 123 Main St Gilbert, Arizona 85123 United States (602) 402-6310		INVOICE # 55 BILLED TO JOHN WILKINSON 1234 Stratum St London, ME7 9AA United Kingdom	
ITEM	QTY	UNIT PRICE	TOTAL
Chocolate Cake	1	£19.00	£19.00
UPCOMING PAYMENTS			TOTAL
7/14/2016			£20.90
		VAT	£1.90
		INVOICE TOTAL	£20.90
		OUTSTANDING BALANCE	£20.90
		PAYMENT DUE TODAY	£20.90

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

	merce	A	0 * # 1 0
MY NAV	CRM	MARKETING	E-COMMERCE
Dashboard	Contacts	Campaign Builder	E-Commerce Setup
My Day	Companies Opportunities Referral Partners Visitors	Email & Broadcasts Lead Generation Templates Legacy	Orders Products Actions Promotions
Edit	Reports Settings	Reports Settings	Eegacy F 2 Settings
Guotes & In	voices		

Orders		
Order Settings	Countries	
Product		Default Co
Orders	Billing	
J.m.		Currency l
Quotes & Invoices		Payment
Calaa Tau		

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.

00 10 N 8	Invoice From Infusionsoft - Inbox	
Message		e.
K Z Z Z Z Monting	ward and the second sec	
All All	E worke C, Hutes - Head-offeed Calegoride Follow Up	
nvoice From Infusionsoft		
and the local data		
ng Maps		Manage Add-In
	Receipt From Infusionsoft	
	Paid \$19.99	
	Invoice#19	
	Specialized =	
	¹ CONSULTING	
	Mike New Invoices	
Product	April 4, 2016	Total
Red Voluet Cuprake		\$2.00
Ned Verret Capcake		\$2.00
Super Chocolatey Chocolate Cupcake with Chocolates		\$2.99
Lemon Cupcake		\$24.00
Lemon Cupcake Free	Trial	-\$24.00
Cupcake of the Mont	h Club	\$15.00
	Discount:	\$0.00
	Shipping	\$0.00
	Tax:	\$0.00
	Invoice Total:	\$19.99
	Outstanding Balance:	\$0.00
	Next Payment Due:	\$0.00
	Infusionsoft 123 Main St Gilbert Arizona (602) 402–6310	