

Set up Legacy Invoice

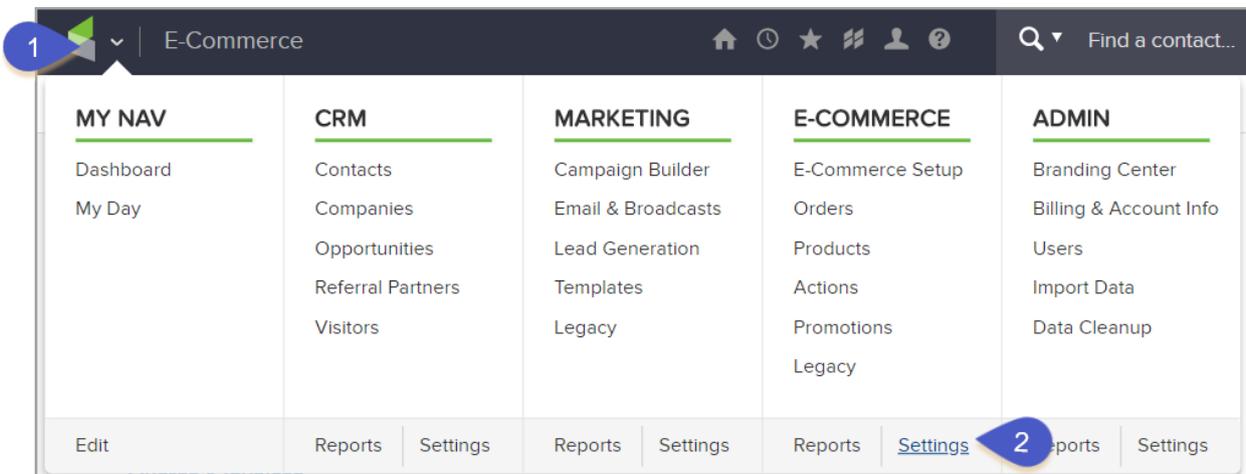
The default order invoice is very basic. It displays a standard black and white layout with your company logo. If you want to customize the type of information displayed in the invoice or modify the layout or table colors, you will need to create a custom order invoice. You can set up multiple custom invoice templates; however, at any given time you can only have one default selected for orders and one for subscriptions. These custom invoices will be sent to customers when:

- An Infusionsoft user creates a manual order and chooses to send an invoice immediately.
- A successful payment is made through the shopping cart, through an autocharge, or recorded manually (if enabled through E-Commerce > Settings > Orders.)
- An Infusionsoft user sends an invoice manually from an order record upon request after purchase.

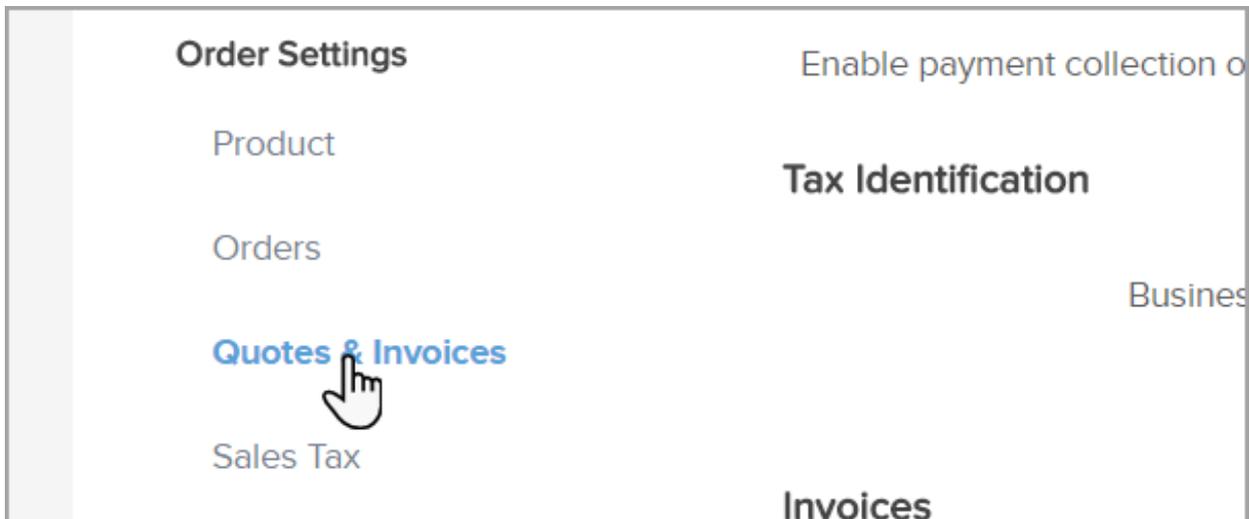
The following tutorial is for applications that have the option to 'Enable payment collection on Invoices', turned off.

Setup Legacy Invoice Template

Go to E-Commerce > Settings

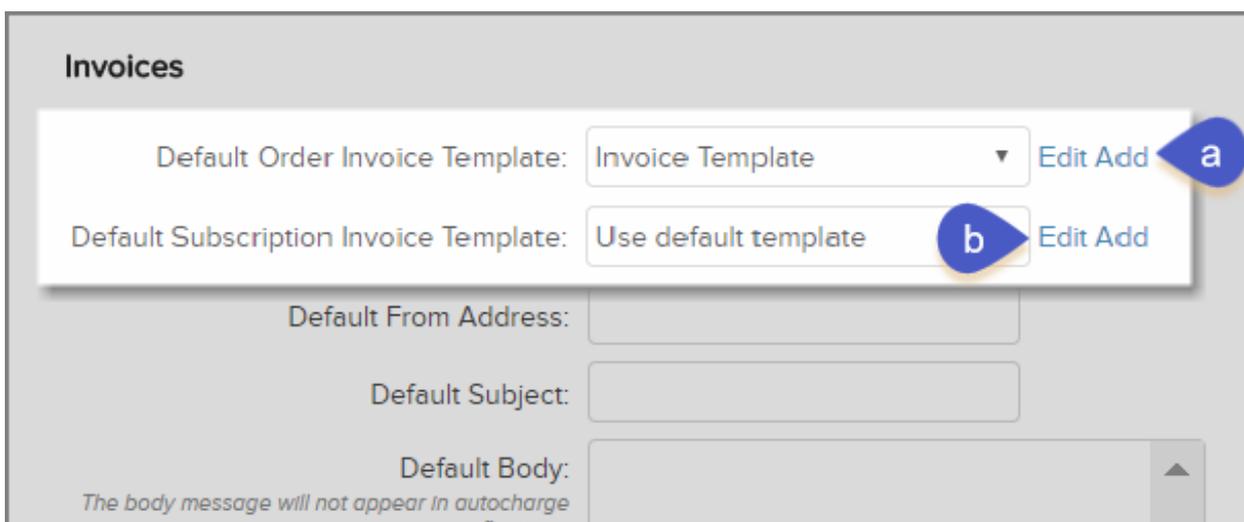


Click on **Quotes & Invoices** in the *Orders Settings* menu.



Under Invoices

- Click **Add** to create a new order invoice or subscription invoice template.
- Click the **Edit** to customize the invoice.



A window will pop-up (make sure you have no pop-up blockers enabled through your browser)

Add a *Title*, *From Email Address*, and *Subject Line*.

Manage Email Template

General Categories & Follow-Up Sequence Misc Expenses

Template Options

Title: Invoice Template **1**

Public/Private: Public

Compose Email

Other...

2 From: Name (Optional): Email Address: orders@alwayshelpful.org

To: The contact's primary email address (Change) Add CC | Add BCC

3 Subject: alwayshelpful Invoice ~Invoice.Id~ Merge ?

Send As: HTML (graphics & colors) Plain Text (no graphics) HTML & Plain Text

Click on the Edit Email Body

Send As: HTML (graphics & colors) Plain Text (no graphics) HTML & Plain Text

Edit Email Body

 always helpful

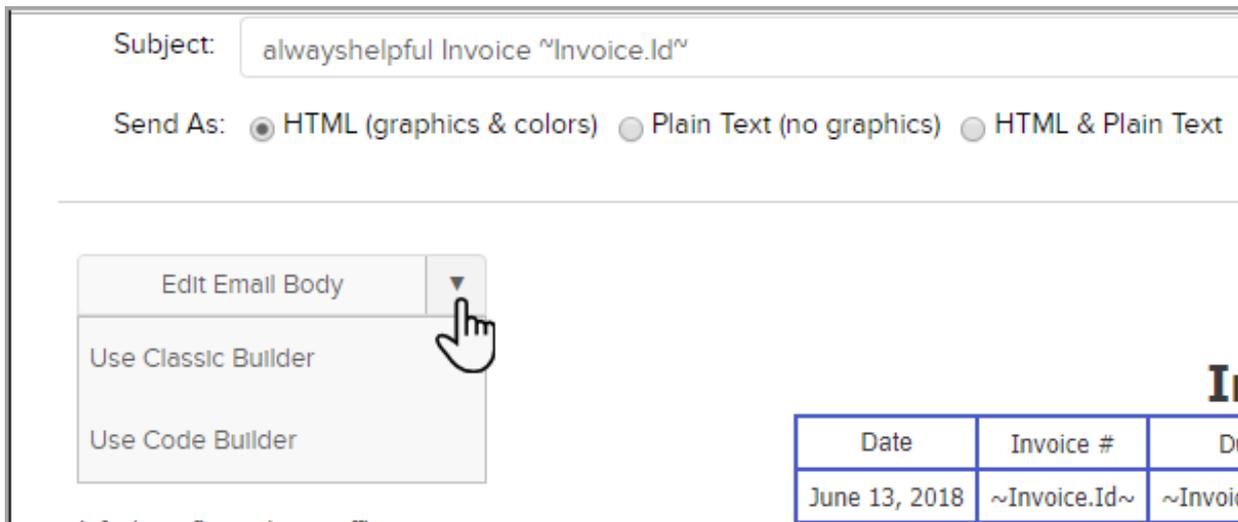
Inv

Date	Invoice #	Due I
June 13, 2018	~Invoice.Id~	~Invoice.D

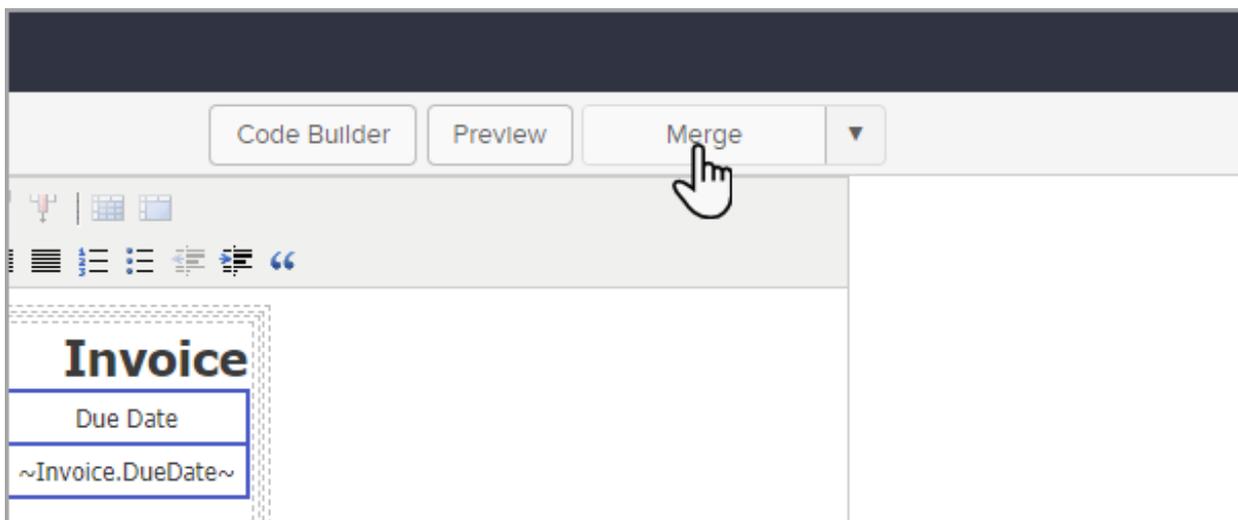
Infusionsoft - my home office
1260 S Spectrum B.
Chandler, Arizona 85286

or click on the arrow to choose to build the email in

either the classic WYSIWYG editor or the Code Builder.

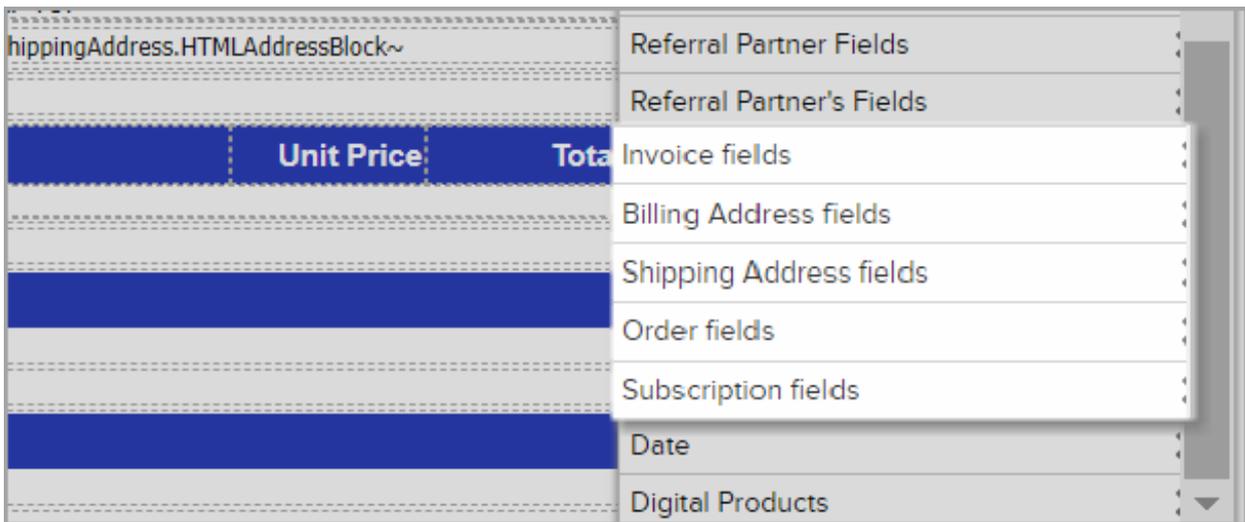


To merge custom fields into the email, click on the Merge button.

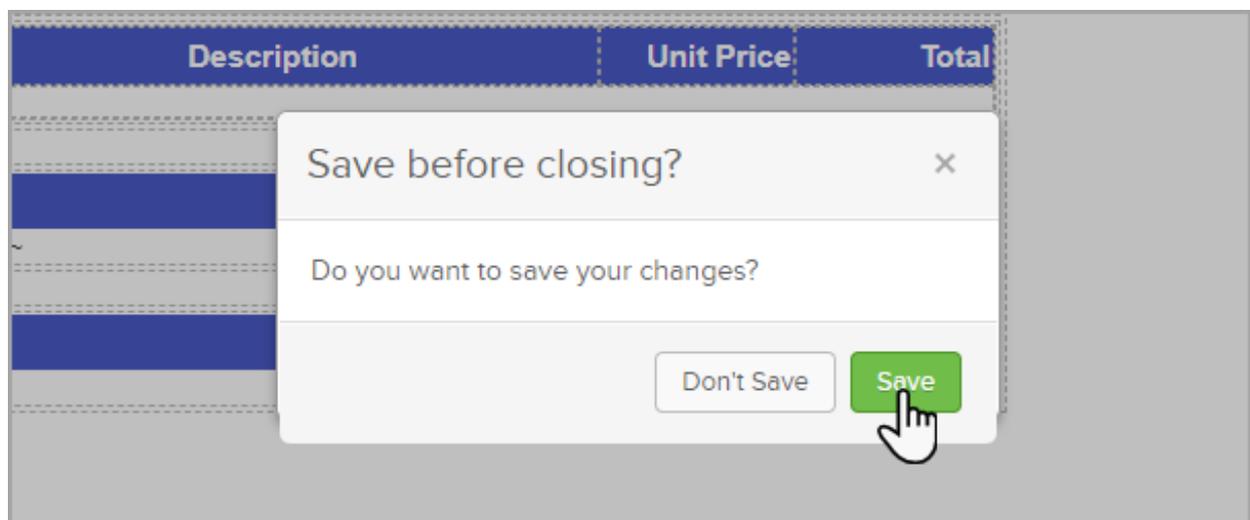
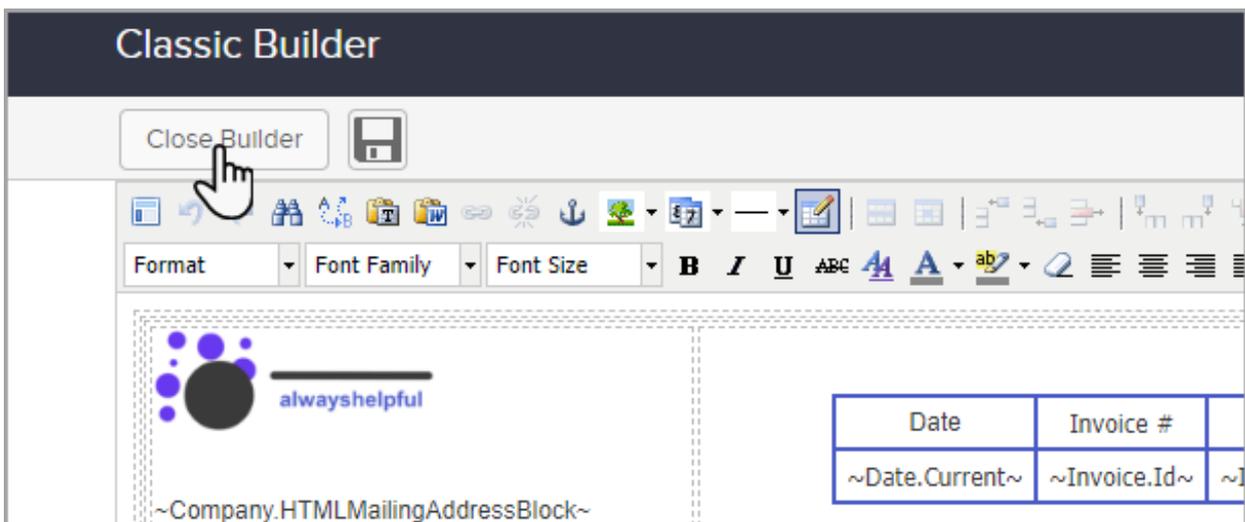


Some common fields include:

- Invoice Fields
- Billing and Shipping Address Fields
- Order and Subscription Fields



Click on the Save icon and then click the Close Builder button.



Scroll down and Save your changes

Test this Email

Send a test to: Alwayshelpful Support (Select a different contact...) Save & Send Test

Support@alwayshelpful.org
(907) 744-5221

Save Delete Clone



Set up Other Defaults

From Address, Email Subject, and Email Body: Enter these default email settings for invoices sent from an order record. You can also customize this information as you go through the process of sending an invoice.

Default From Address:

Default Subject:

Default Body:

The body message will not appear in autocharge notifications.

Quotes

Enter a Tax ID Number to Merge Into Invoices

1. Enter you **Business number**
 - o This field is available from the "Your Company Fields (most common) Merge Fields in a custom invoice template.
 - o The "tax type options" will only display with "Enable payment collection on Invoices". To display the tax type enter it with the Business Number.

Source Information
Tracking: No information is available

Order Items

Name	Price/Unit	Type	Total Price
Email Format Webinar	\$500.00 x 1	Product	\$500.00
Sales Tax	\$60.00 x 1	Tax	\$60.00
ORDER TOTAL			\$560.00

Payments

Date	Type	Status
	Payment Total	
	BALANCE	

Commissions

Referral Partner	Commission
No Commissions to Display	

Payment Plan
Auto Charge: Yes [View Payment Attempt History]
 Email the invoice to the customer upon successful payment

Pmt #	Status	AmtDue
Pmt 1	Unpaid (Auto)	\$560.00

Invoice Preview

Invoice # 3280, Date June 13, 2018, Due Date 06/13/2018

TO: Olivia Soft, 2236 Scenic Way, Chandler, AZ 85286, United States

SHIP TO: Olivia Soft, 2236 Scenic Way, Chandler, AZ 85286, United States

Qty	Description	Unit Price	Total
1	Email Format Webinar - \$500.00	\$500.00	\$500.00
1	Sales Tax - \$60.00	\$60.00	\$60.00
Total Purchases			\$560.00

Payments Made

Payments Due

Date	Due	Amount
6/13/2018	Due now	\$560.00
Outstanding Balance		\$560.00
Balance Due Now		\$560.00

EIN dd4s48d

PLEASE DO NOT REPLY TO THIS EMAIL.

This email is generated automatically, and is not monitored for responses.

If you have any questions about using this service, visit our online help at: <https://alwayshelpful.org>

Manually Send an Invoice

Click [here](#) for detailed information