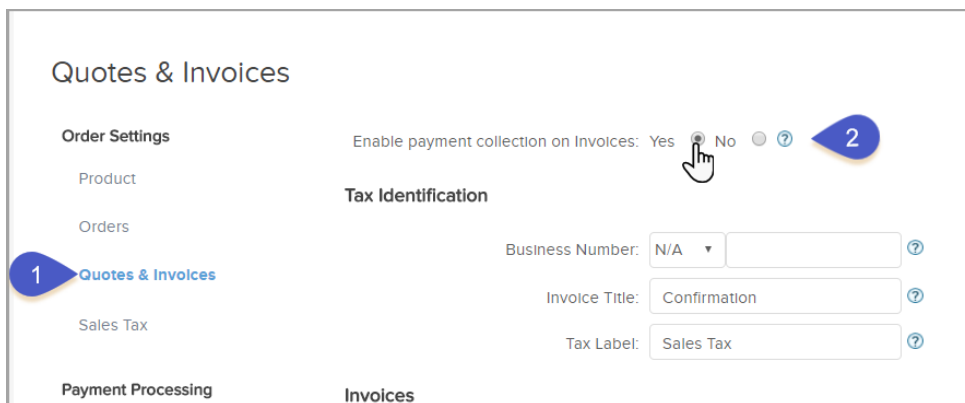# Setup Payment Collection Invoice 🔗

This article applies to:

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 **Order Settings** option allowing you to enable this new feature.
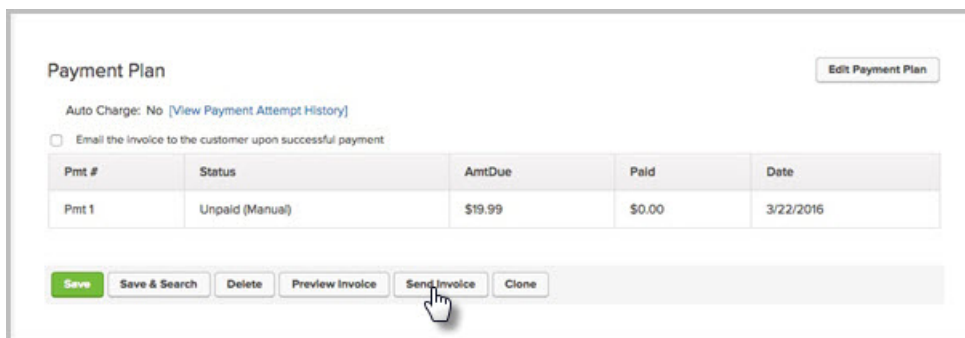
4. Click **Save**

   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:

5. **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 | mr.invoice@email.com |
| Subject | Here is your invoice |

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
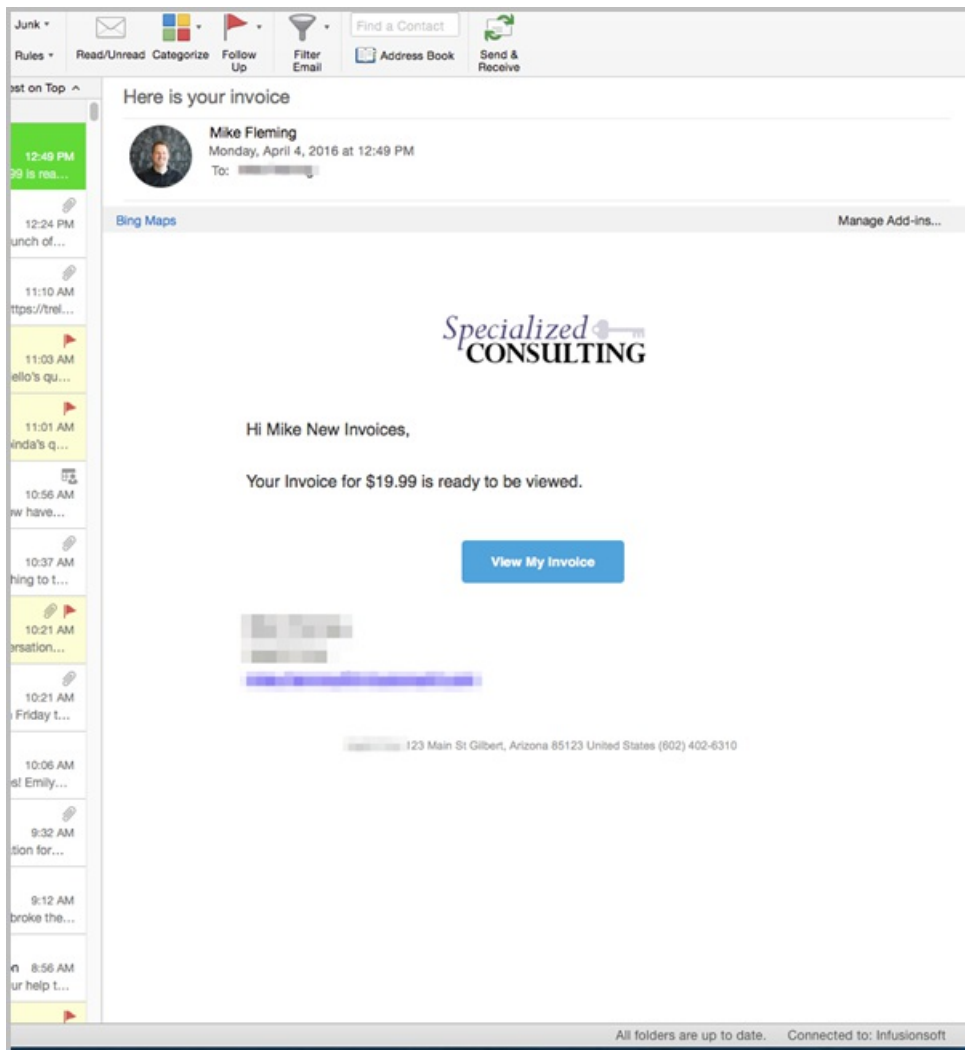
6. Modify the **To** and **Subject** line if you wish.

7. 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

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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

UPCOMING PAYMENTS	TOTAL
3/22/2016	$19.99

INVOICE TOTAL	$19.99
OUTSTANDING BALANCE	$19.99
DUE	**$19.99**

Print

Pay Now

Note: If you set the invoice date to a date in the future, the **Pay Now** button will not show until the actual invoice date. i.e., The payment due date is set for 10/4/2019 and the email is sent on 10/3/2019. On 10/3/2019, the **Pay Now** button will not show, but on 10/4/2019 it will!
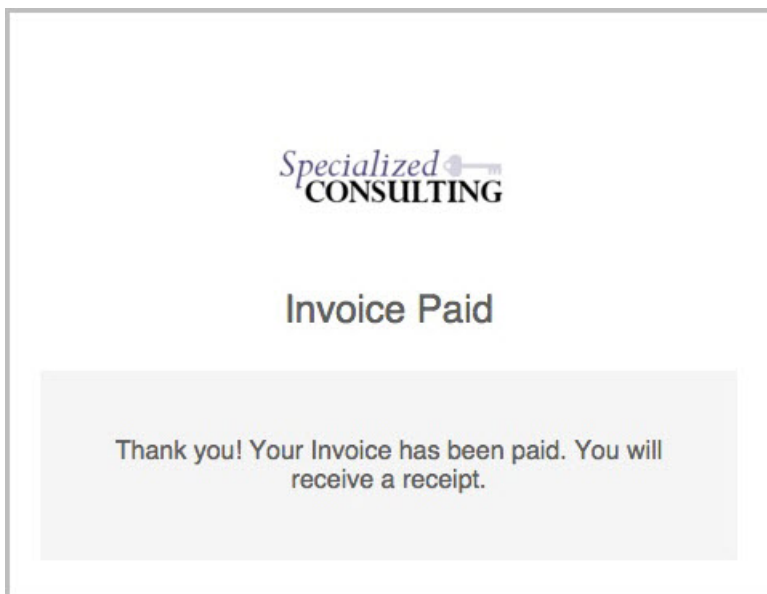
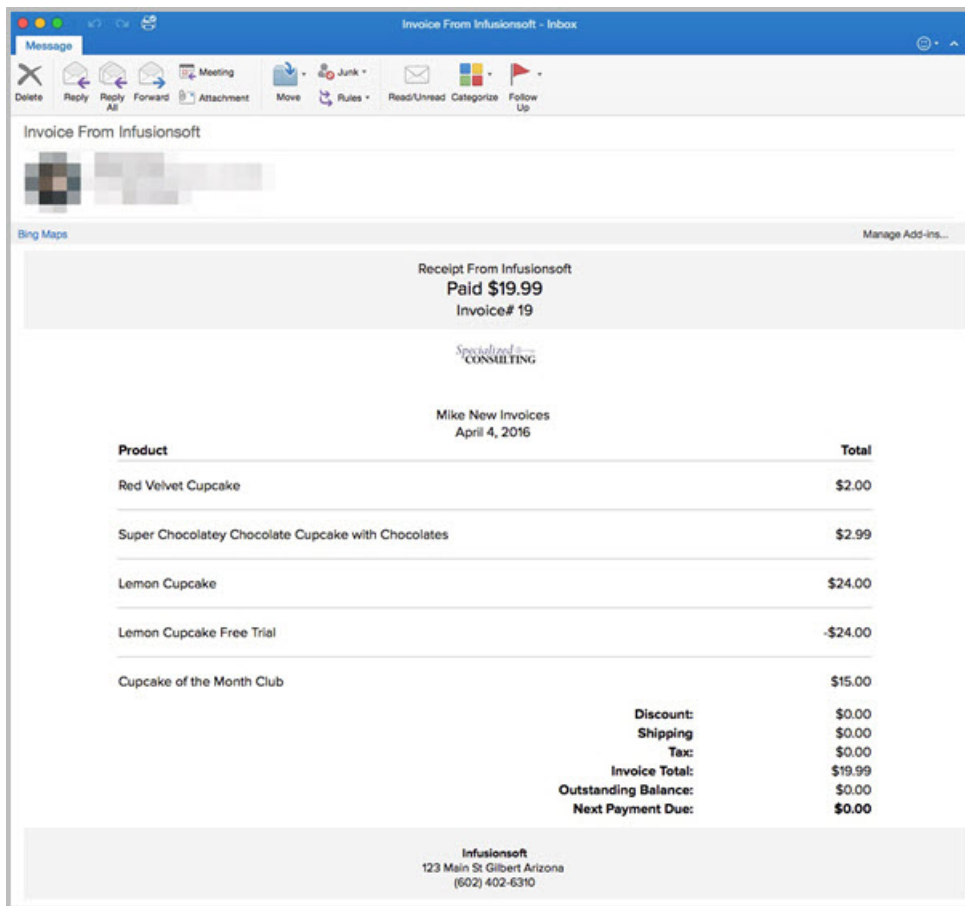1. Your customer will enter their payment information and click **Submit.**

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

3. 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 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

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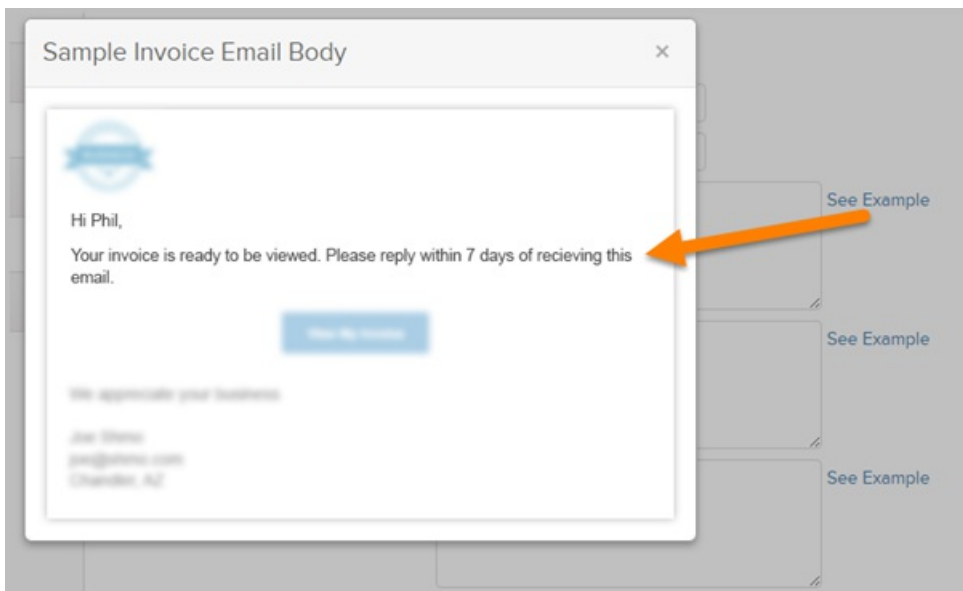
Invoice - International Tax Settings

As an international customer, you can use Max Classic 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 ● ⑦

Tax Identification

Business Number: [VAT ▼] [_____🔲] ⑦

Invoice Title: [Tax Invoice] ⑦

Tax Label: [VAT] ⑦

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

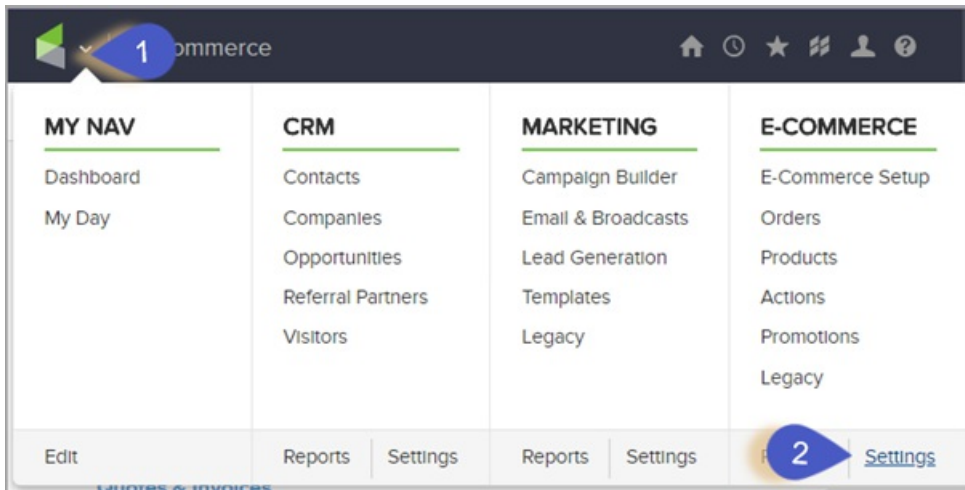|	
VAT	£1.90
INVOICE TOTAL	£20.90
OUTSTANDING BALANCE	£20.90
PAYMENT DUE TODAY	**£20.90**

The total price includes VAT

These are my terms and conditions.
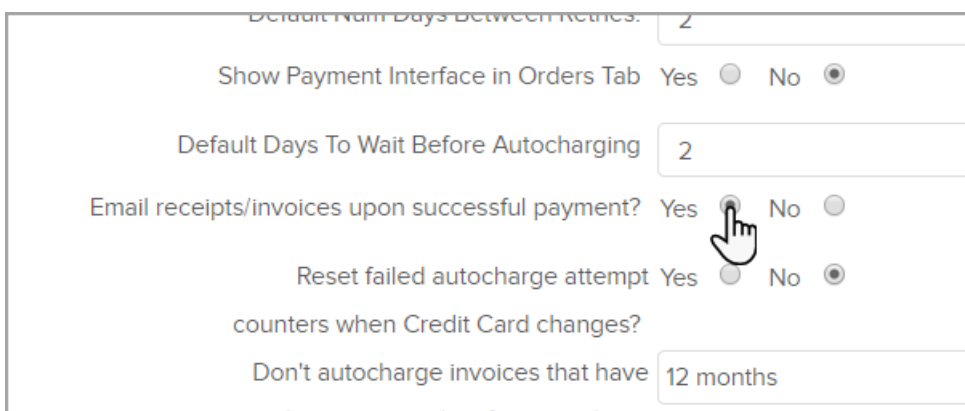
Receipts

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.
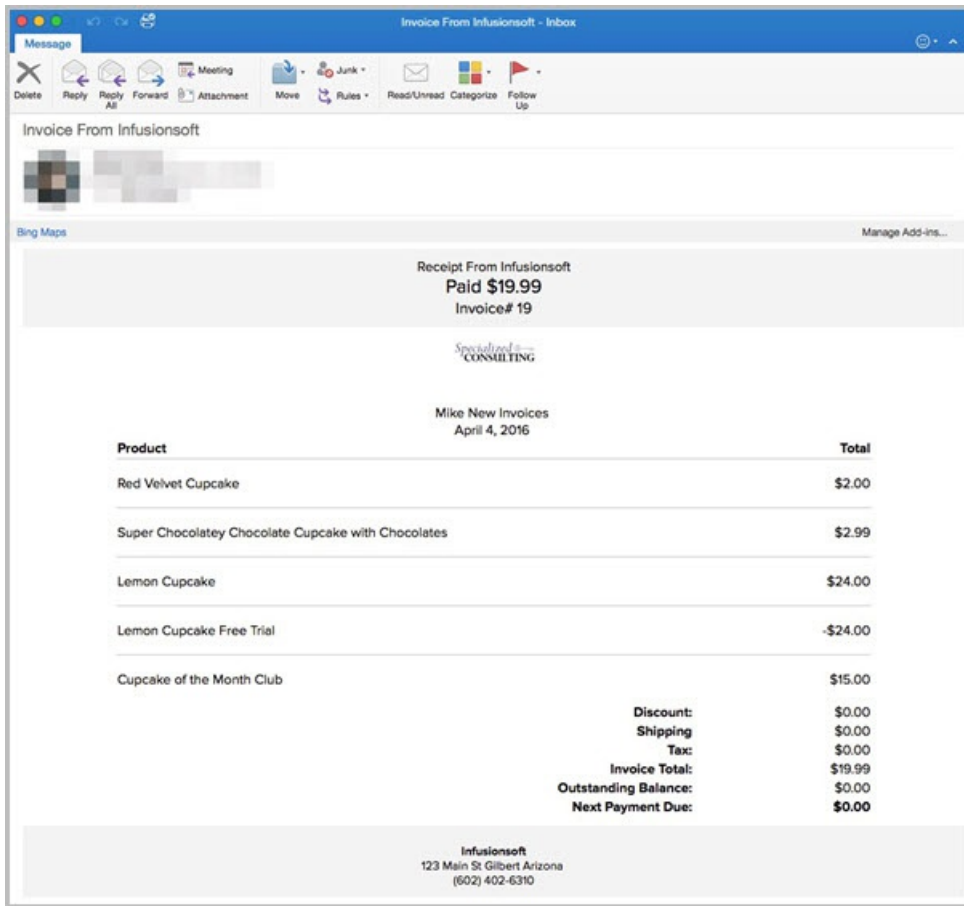
1. Go to E-Commerce > Settings > Orders

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.

Invoice From Infusionsoft

Receipt From Infusionsoft
Paid $19.99
Invoice# 19

Specialized
CONSULTING

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**

Infusionsoft
123 Main St Gilbert Arizona
(602) 402-6310

Note: When you choose **Enable Payments collection on invoices**, you can no longer use legacy custom invoices! Click here to learn more.