

Set up Legacy Invoice

This article applies to:

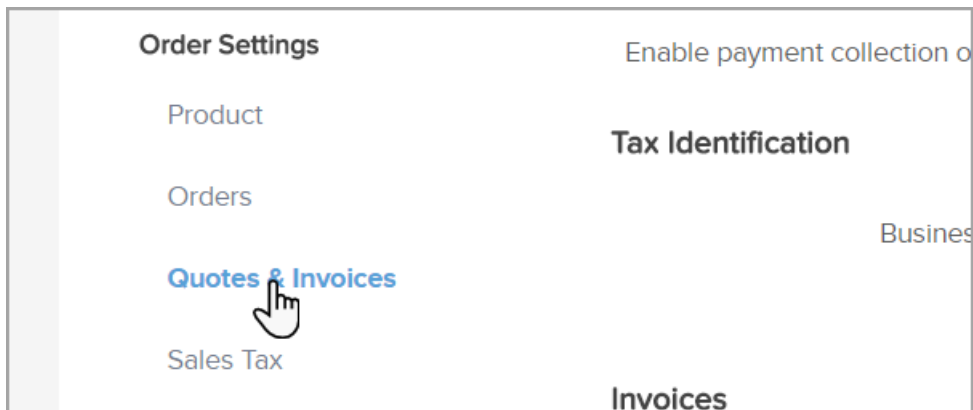
The default order invoice is very basic. It displays a standard black and white layout with your company logo. If you want to customize the type of information displayed in the invoice or modify the layout or table colors, you will need to create a custom order invoice. You can set up multiple custom 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:

- A Max Classic 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.)
- A Max Classic 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

1. Go to E-Commerce > Settings
2. Click on **Quotes & Invoices** in the *Orders Settings* menu.



3. Under Invoices

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

Invoices

Default Order Invoice Template: Invoice Template Edit Add **a**

Default Subscription Invoice Template: Use default template Edit Add **b**

Default From Address:

Default Subject:

Default Body:

The body message will not appear in autocharge

4. 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

5. Click on the **Edit Email Body**

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

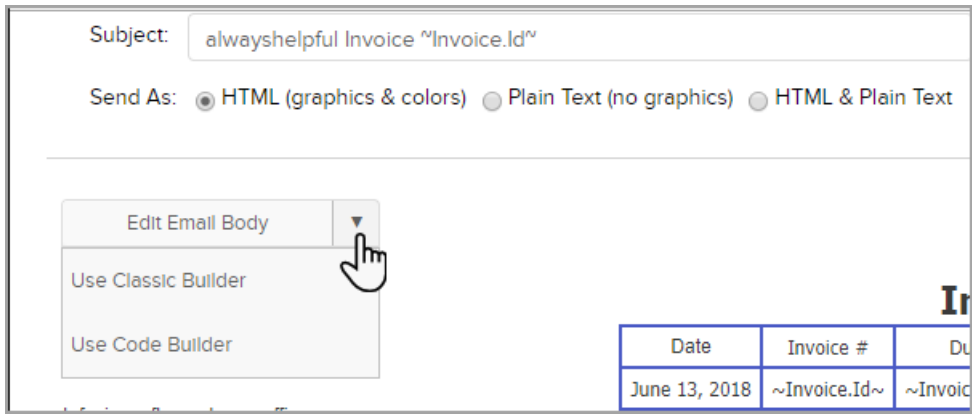
Edit Email Body **▼**

 **Inv**

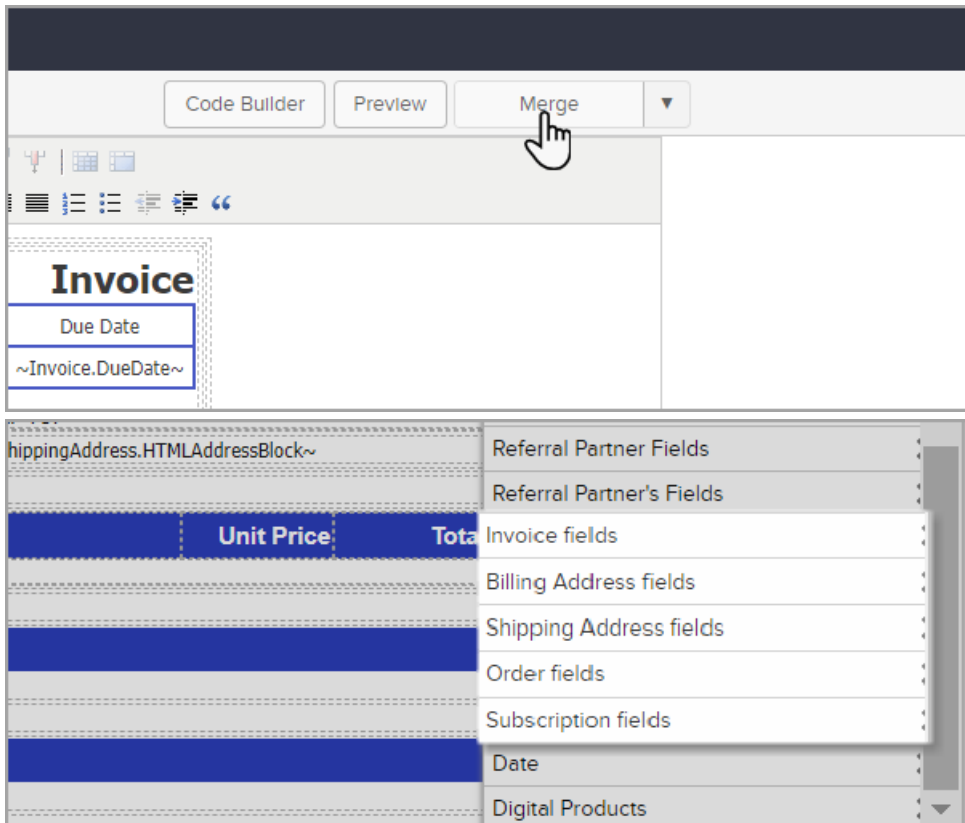
Date	Invoice #	Due
June 13, 2018	~Invoice.Id~	~Invoice.D

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

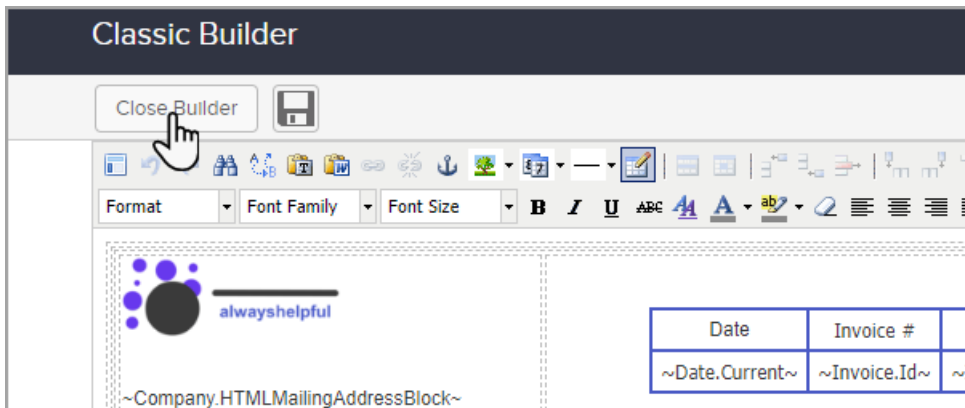
6. or click on the arrow to choose to build the email in either the classic WYSIWYG editor or the Code Builder.

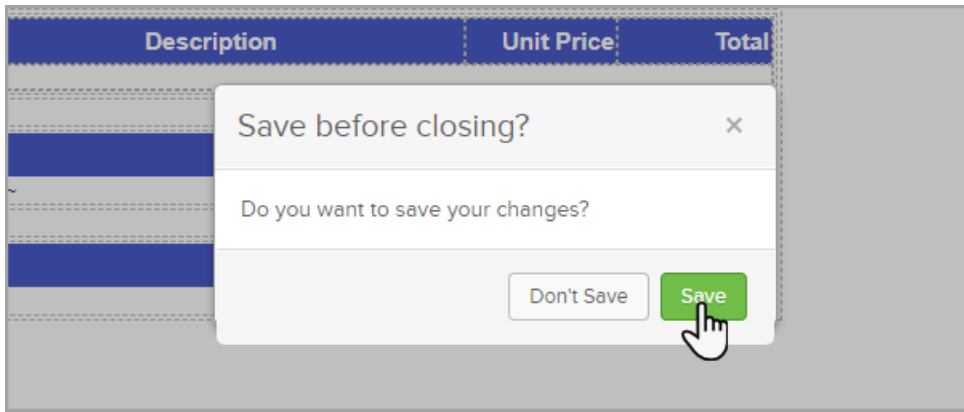


7. To merge custom fields into the email, click on the **Merge** button.



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





9. Scroll down and **Save** your changes

A screenshot of an email configuration form. The title is 'Test this Email'. Below the title, there is a text input field containing 'Alwayshelpful Support (Select a different contact...)' and a 'Save & Send Test' button. Below the input field, the email address 'Support@alwayshelpful.org' and phone number '(907) 744-5221' are displayed. At the bottom of the form, there are three buttons: 'Save', 'Delete', and 'Clone'. A hand cursor is pointing at the 'Save' button.

10. 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.

A screenshot of a form for setting default email settings for quotes. The form has three sections: 'Default From Address:' with a text input field containing 'Orders@alwayshelpful.org'; 'Default Subject:' with a text input field containing 'alwayshelpful.org Invoice is no'; and 'Default Body:' with a text area containing the text 'Thank you for giving us the opportunity to serve you. If we can be of further assistance, please let us know.' Below the form, the word 'Quotes' is visible.

11. Enter a Tax ID Number to Merge Into Invoices

- o Enter your **Business number**

- This field is available from the "Your Company Fields (most common) Merge Fields in a custom invoice template.
- 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

Save Save & Search Delete Preview Invoice Send Invoice Clone

https://yq263.infusionsoft.com/invoice/template/preview.jsp?invoiceid=3280&orderid=3280 - Google Chrome

Secure | https://yq263.infusionsoft.com/invoice/template/preview.jsp?invoiceid=3280&orderid=3280

Close Window Print Invoice Email Invoice

Invoice

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

Infusionsoft - my home office
1260 S Spectrum B
Chandler, Arizona 85286
United States
(385) 595-1310

Thank you for giving us the opportunity to serve you.

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

Date	Description	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>

Click [here](#) to manually send an invoice