

Campaign Sequence - Create Order

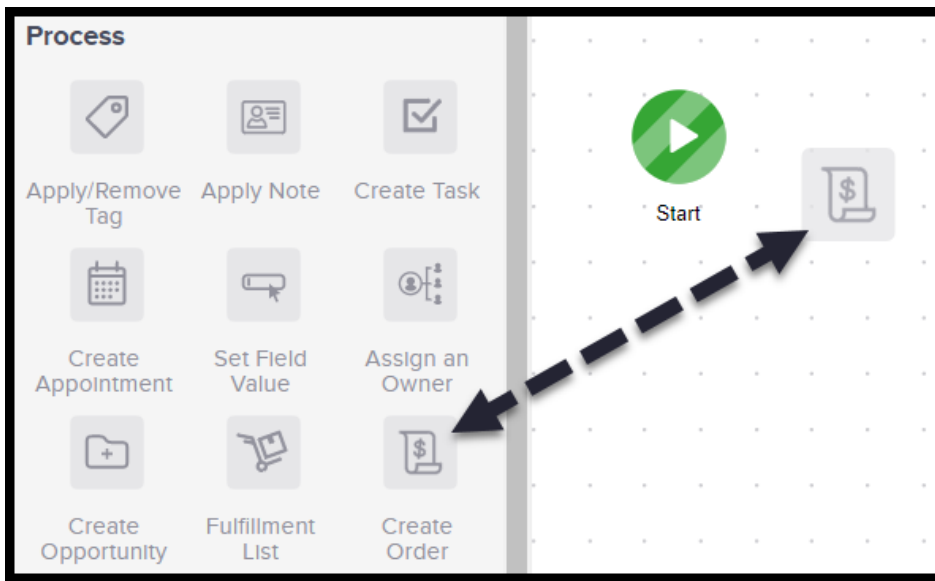
This article applies to:

- Max
- Max Classic

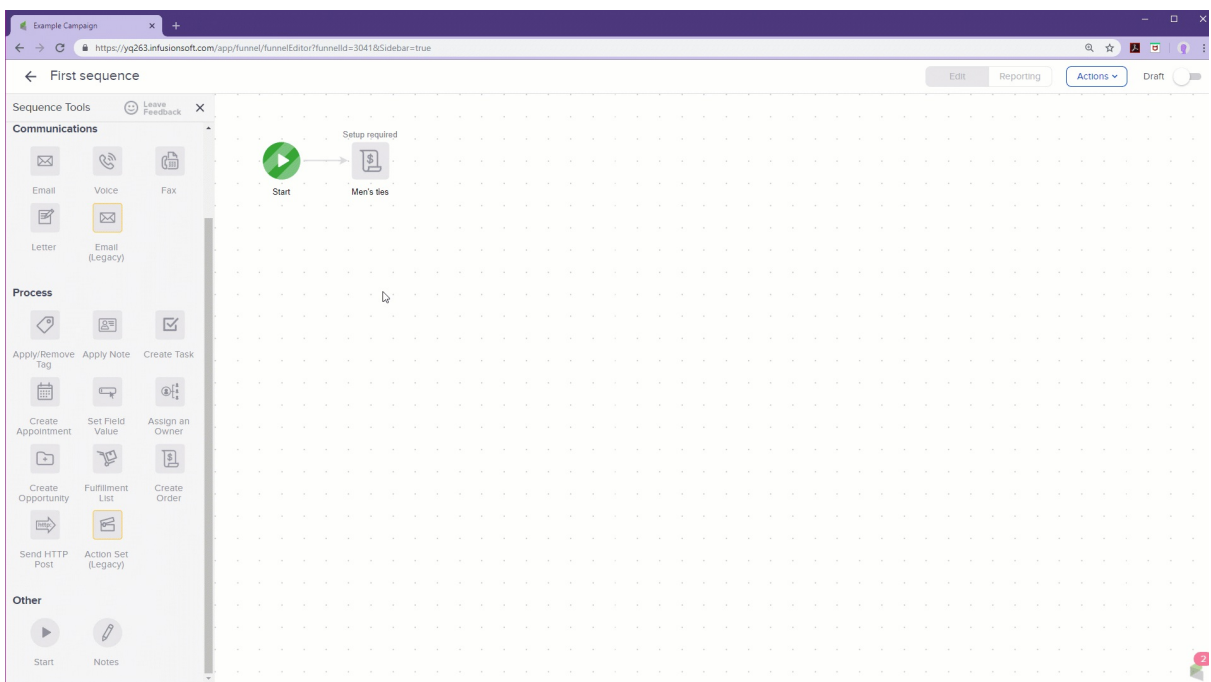
The **Create Order** sequence automates the order-to-invoice process, enabling you to automate an aspect of your business. You can add products, set up payment options, and preview and edit the invoice before it sends.

Configure the Create Order process

1. Drag the **Create Order** process onto the canvas



2. Double click to configure



Add products to the order

1. Click **+Add Products**.
2. From the search located on the left type the name of the existing product or type the name of a new product and create it on the spot. Subscription products will be displayed with their frequency.
3. Click **Add** in the bottom right corner.

Auto pay Payment Options

The **Auto Charge this Order** options and **Send Payable Invoice** option are only visible if you have set **Enable payment collection on Invoices** to Yes. You can find this setting in the **E-Commerce > Settings > Quotes & Invoices** section.

Payment Options

- Auto Charge this Order *(If no credit card is found, an order with a balance due will be created)*
- Auto Charge this Order *(If no credit card is found, a Payable Invoice will be sent)*
- Send Payable Invoice
- Send Invoice without Payment Option

- The **Auto Charge this Order** in the **Payment Options** will not send the email template in the **Create Order** process
- Instead the receipt email is sent. This is located through **E-Commerce > Settings > Orders & Quotes** and then scrolling to the bottom

IMPORTANT: The **Auto Charge this Order** in the **Payment Options** will auto charge the most **recently** added **Credit Card**. For apps that use **tokenized payment methods**, this will charge the most recently added **payment method** through the **merchant account** with which the payment method was authorized.

Edit text for payable invoice email

This section is used only if a **Payment Option** is selected.

1. Select either **Send Payable Invoice** or **Send Invoice without Payment Option**

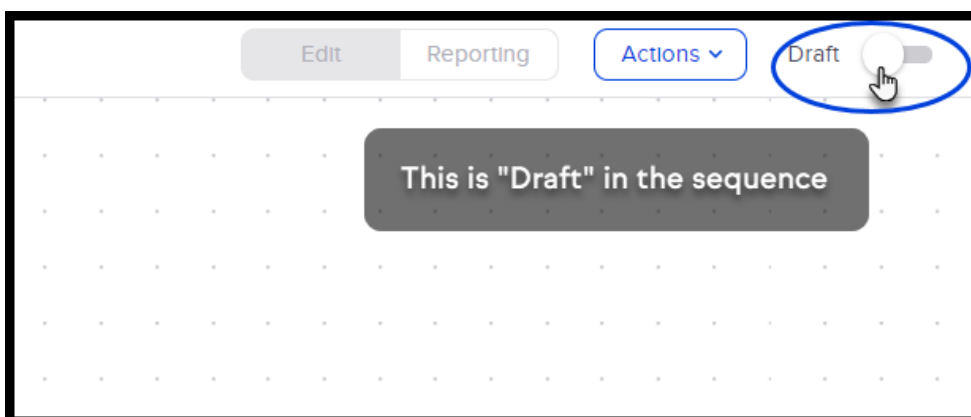
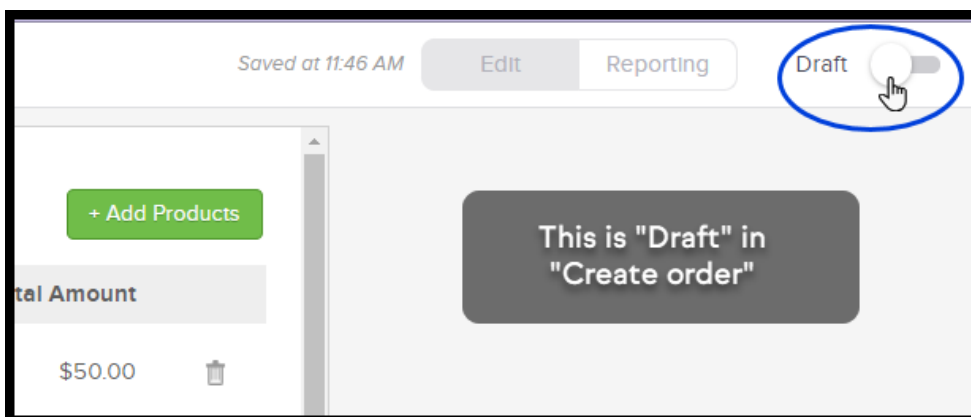
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2. Edit the text in the invoice email.

Set your Create Order process and sequence to Ready

1. When you have finished writing your email, change both **Create Order** process and the sequence to **Ready**



2. Slide the **Draft** to **Ready**. **Note:** If either the **Create Order** process or the **Sequence** is left in **Draft** it will not be published

FAQ

Q: Can I upload a company logo from here?

A: No, you'll need to update your invoice logo in the **Branding Center > Logos** section of the product.

Q: Does the order calculate sales tax?

A: Assuming the [sales tax](#) and the [product](#) have been set up properly - Yes!

Q: If a contact has multiple cards on file, which card will be charged?

A: The most recently Validated card will be charged.
