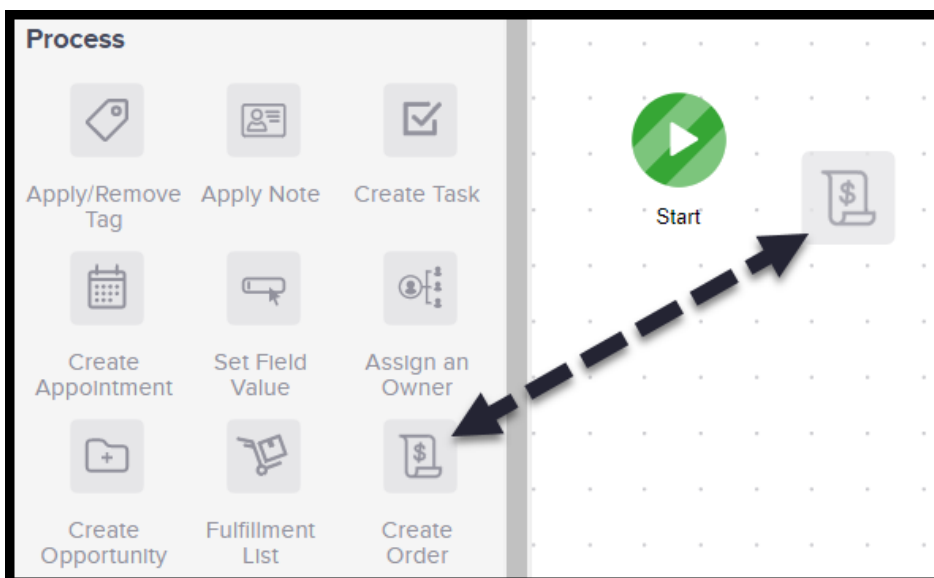


# Campaign Sequence - Create Order

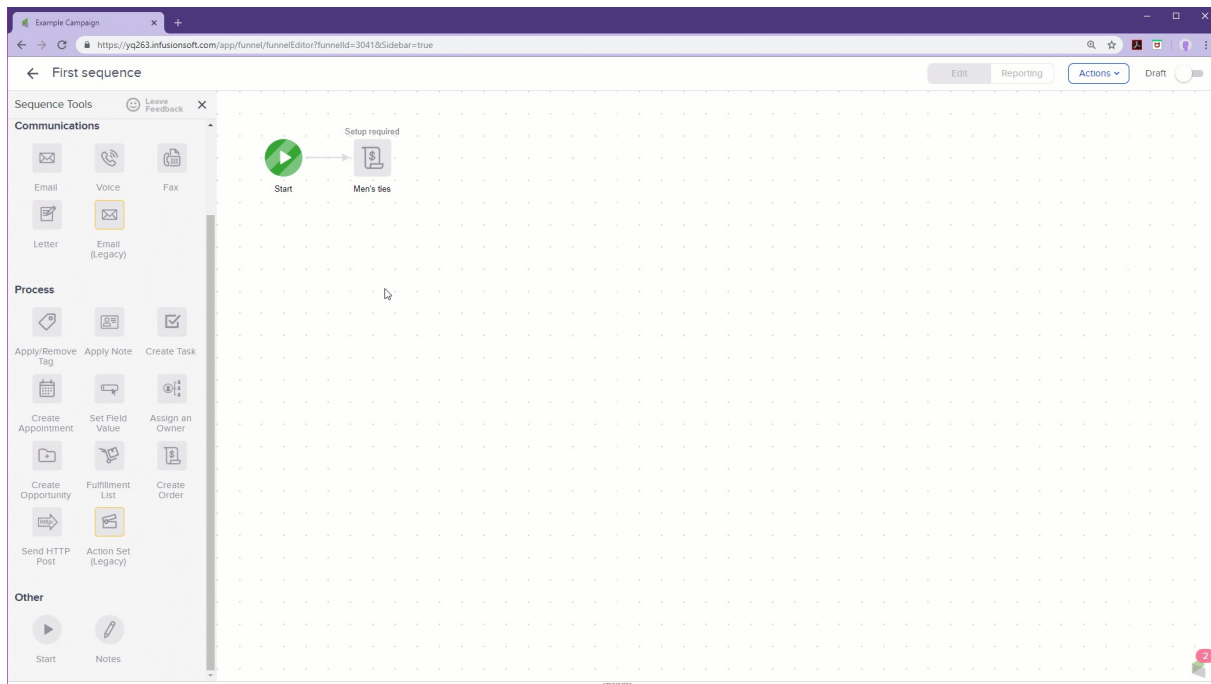
The **Create Order** sequence automates the order-to-invoice process, enabling you to automate an aspect of your business. You can add products, set up payment options, and preview and edit the invoice before it sends.

## 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

## 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**

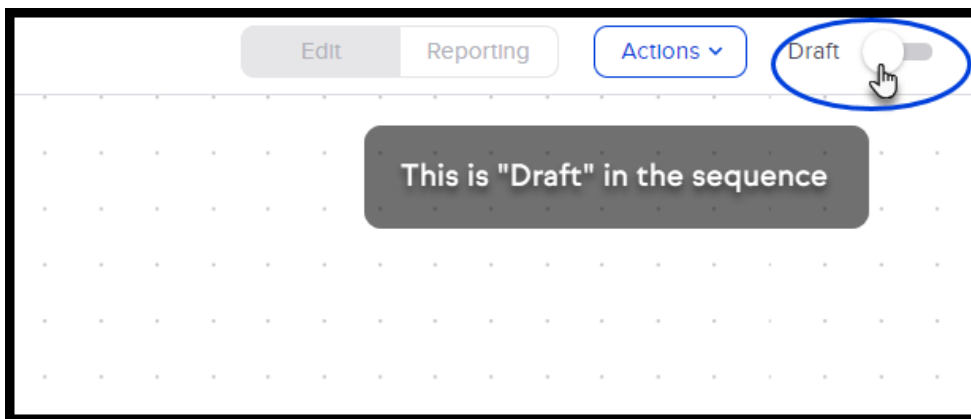
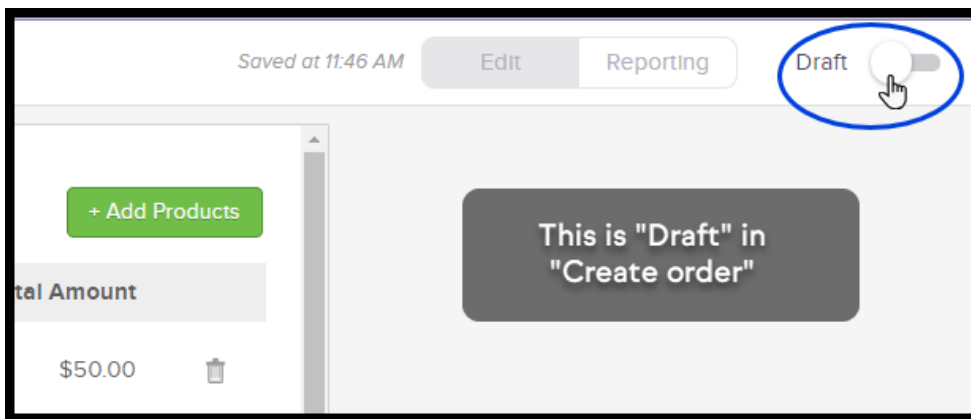
**Payment Options**

- 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

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!

