

Invoices - Create and send an Invoice

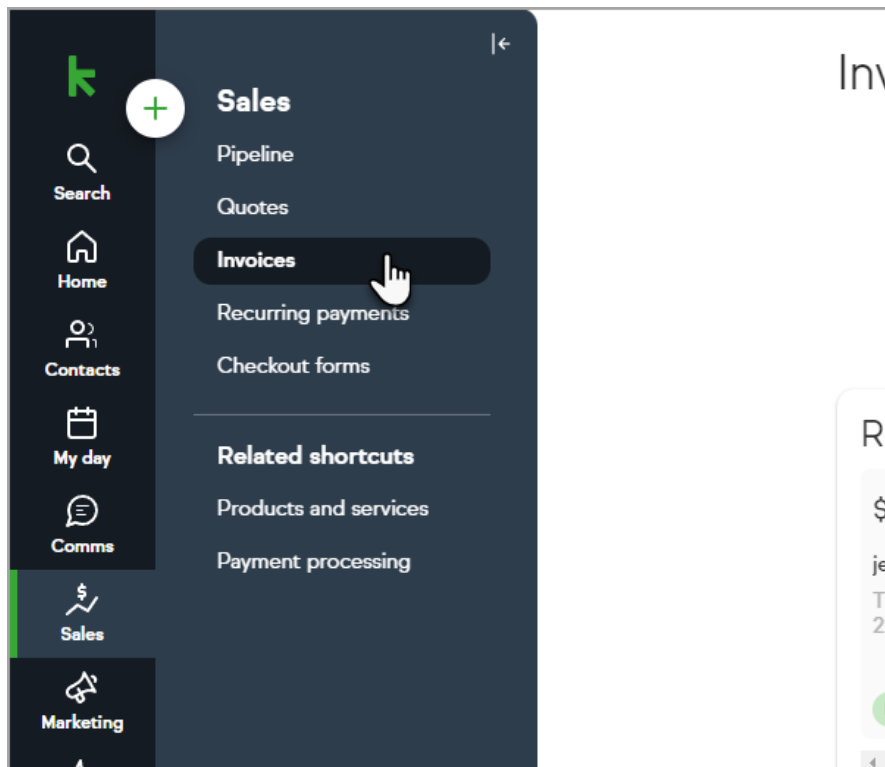
This article applies to:

Send professional invoices and track their status in one central location. Automatically send a follow up email once the customer pays an invoice. You can also [send an invoice directly from a Contact Record](#).

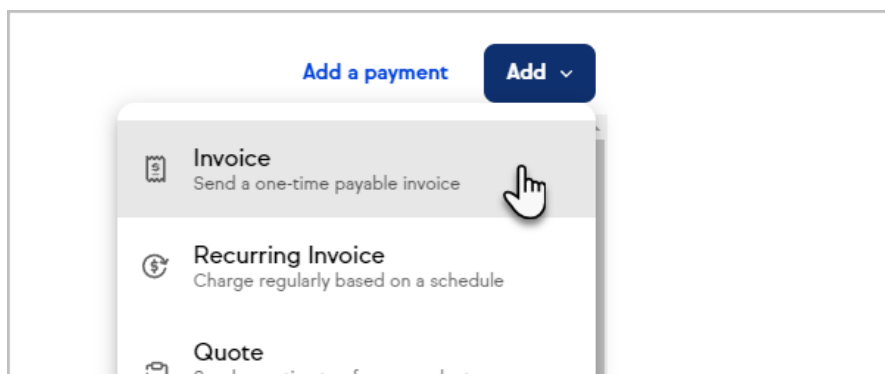
Create an invoice

As you create and edit your invoice, your changes will automatically be saved.

1. Navigate to **Sales > Invoices** in the left-hand nav



2. Click **Add > Invoice**



3. Select a contact

Billed to Due by
Choose contact* Jan 28, 2020

[+ Add a new contact](#)

	Price	Quan
James Allen		
John Allen		

Subtotal
Amount paid

4. Change the **Due by** date by clicking the date and selecting your desired date

Due by
Dec 17, 2020

December 2020

Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	1	2	3	4	5
6	7	8	9	10	11	12

5. Click **Add a line item**

Billed to Due by
Justin Case Dec 5, 2020
contact19@infusionhole.com

[+ Add invoice address](#)

[+ Add a line item](#)

6. Select a product or service or create a new one

[+ Add a line item](#)

Create a new product or service

Custom business success coaching per hour	\$120.00
Deluxe startup package	\$80.00

Acce

7. Edit the price or quantity of the item, if desired

Item	Price	Quantity
Custom business success coaching per hour Includes start up and 1 on 1 sessions. Hourly rates are calculated in whole h...	120	1
+ Add a line item		

Note: Pro and Max customers can [add recurring charges to an invoice](#)

Add a discount or request a deposit

1. Select **Add a discount** or **Request deposit**

Discount		Deposit	
Subtotal	\$199.00	Subtotal	\$199.00
Add a discount		Add a discount	
Amount paid	\$0.00	Amount paid	\$0.00
Total due	\$199.00	Total due	\$199.00
Request deposit		Request deposit	

2. Add the discount or deposit amount either a percentage or dollar amount

Discount	Deposit
Subtotal \$1,500.00 Add a discount Add a discount 10 % \$1,500.00 Save Cancel	Total due \$1,350.00 Request deposit Request deposit 50 % Save Cancel

If necessary, click the **trash can** to remove the discount or deposit amount

Subtotal	\$199.00
10% discount	\$19.90
Amount paid	\$0.00
Total due	\$179.10
Request deposit	

Add sales tax

1. After adding a product to an invoice, click **+ Add sales tax**

Price	Quantity	Total
80	1	\$80.00
		+ Add sales tax

2. Select the appropriate sales tax or create a new sales tax

3. Click Save

4. The tax rate will be applied to the specific line item

Price	Quantity	Total
80	1	\$80.00
		1 tax rate applied

5. Any taxes included on the invoice will be displayed in the summary at the bottom of the invoice

Subtotal	\$80.00
California sales tax (7.25%)	\$5.80
Add a discount	
Amount paid	\$0.00
Total due	\$85.80
Request deposit	

Accept online payments (credit card and PayPal)

1. Click the **Accept credit cards** or **Accept PayPal** toggle to enable or disable each payment method

Accept online payments
Accept credit cards
Accept PayPal

2. If both options are enabled, your customer will be able to choose which payment method to use

Credit Card

Payment methods

Credit Card PayPal

Name on card*

Card number* Expiration* CVV*

Country*

PayPal

Payment methods

Credit Card PayPal

Debit or Credit Card

3. If neither credit card or PayPal are enabled, your customer will have an option to print an invoice

	Invoice # 223
	Print invoice
Due by Jan 28, 2020	Deposit due \$89.55

Add notes and terms

You can enter notes and terms at the bottom of your invoice.

Notes

Add a note (optional)

Terms

Add terms (optional)

Attach files

Any attached files will be included in the email to your client and saved to the contact record for future reference.

1. Click **Attach a file**


Attachments

There are no files attached to this invoice

[Attach a file](#)

2. Drag and drop the file into Keap or click to browse your computer

← Attach a file




Upload a file

[Drag and drop here or browse](#)

All file types are acceptable

3. The attached files will be listed at the bottom of the builder

Attachments [Attach a file](#)

 Designs for GMB.jpg 


Review and send your invoice

1. Click **Next** when you're finished creating the invoice

[More actions](#) ▼ [Next](#)

Invoice #
259

2. Click **See invoice preview** to see what your customer will see when they open the invoice





Your invoice is ready, Michael.

Justin will be charged \$120.00 due on Dec 5, 2020

[See invoice preview](#)

3. Choose to send your invoice by email or text ([Keap Business Line required](#))

Send your invoice with Keap

 Email it Send your invoice directly through Keap. Send email	 Text it Send it with your Keap Business Line ↗ Send text
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or copy a link to share directly with your customer

Get link

Generate a link and share it anywhere

<https://keap.app/invoice/58ff013a-8a63-48e3-a3aa-2ce167cc936> [Copy link](#)

Send invoice via email or text

1. Customize your email or use an [email template](#)

Send invoice
Eryn Fields

To: erin@fieldsofdreams.com

From: "Michael Indrelunas" <michael.indrelunas+stage@keap.com>

Subject: Your invoice is ready, Eryn

Hi Eryn,
Here's the invoice. As always, thanks so much for your business! Please let me know if you have questions.

View invoice

Signature

Send

Note! Contact merge fields are not currently supported within the email or text message, when sending the invoice.

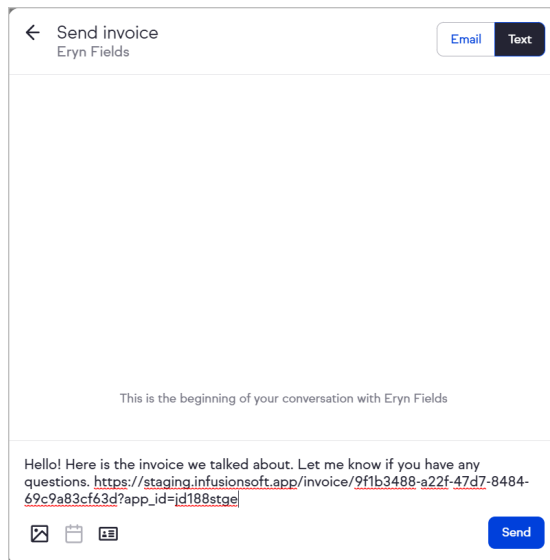
1. Click Send

View invoice

Signature

Send

2. Or click the "Text" toggle to send the quote as an SMS
Note: Sending a quote via SMS requires Keap Business Line

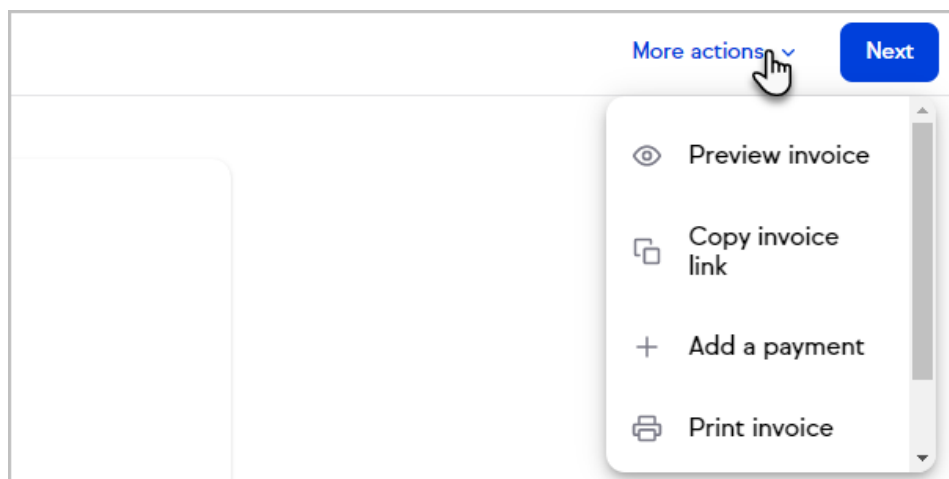


3. Customize the pre-written message as needed and click "Send"

More actions

The Invoice "More Actions" drop down includes:

1. Preview invoice - See what your customer will see when they open your invoice
2. Copy invoice link - Get a direct link to your invoice that can be shared with customers
3. Add a payment - Manually take a payment for an invoice
4. Print invoice - Print a copy of the invoice or save it as a PDF
5. Delete - Delete an invoice in Draft or Sent status



Note: Once the invoice is Paid, the **Add a payment** and **Delete** options will not be available.

View and search recent invoices

You can view your recent invoices and search all invoices from the Money page's Invoices tab. Your most recent invoices are listed first.

You can search by the invoice's number, status, due date, date created, amount or the contact's name.

FAQ

Can I schedule invoices to be sent at a future date?

You cannot schedule the invoice email to send at a later date.

Can I schedule recurring invoices?

No, but you can create a [Recurring Payment](#) for transactions that should occur on a regular schedule.

Can I edit an invoice after I've sent it?

Yes, you can edit an invoice after it's been sent. After making edits, you must to re-send the invoice for your client to get the most up-to-date copy.

Can tax be applied to an invoice?

Yes, you can add line items for sales tax as needed. See our [Add sales tax](#) article for more information.

Will invoices trigger automation?

You can use the purchase goal with invoices so that a successful credit card payment results in that goal being triggered.

Are there any fees associated with Keap Invoices?

Payments processed via invoices are subject to the merchant transaction fee associated with the payment processor.
