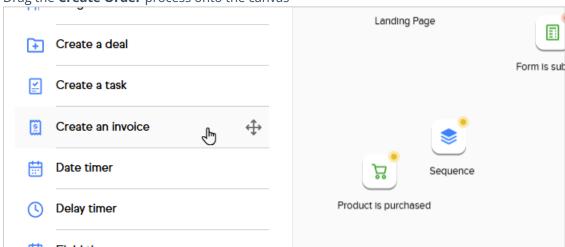
Advanced Automation sequence - create an invoice

Last modified on: 07/07/2025 11:22 am MST Tags: Campaign Sequence Keap-Pro Keap-Max

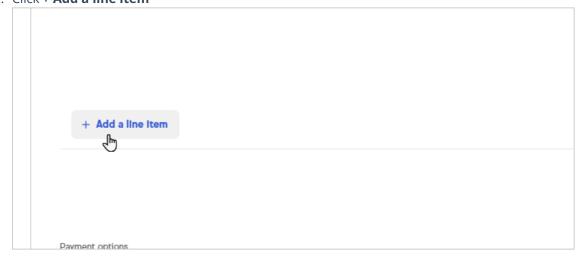
The **Create Order** "then" automates the creation of an invoice, enabling you to automate yet another aspect of your business. You can add products, set up payment options, and send the invoice to contacts that enter this process.

How to configure the Create an invoice "then"

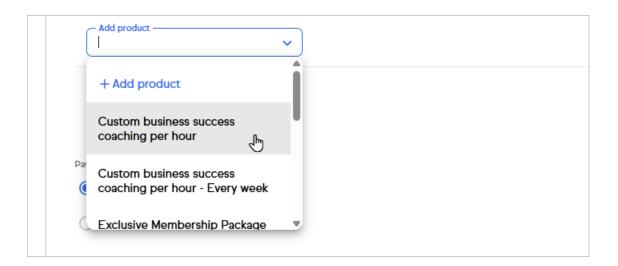
1. Drag the **Create Order** process onto the canvas



2. Click + Add a line item



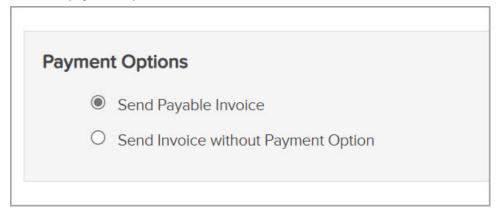
3. Type the name of an existing product and select it from the list or create a new product



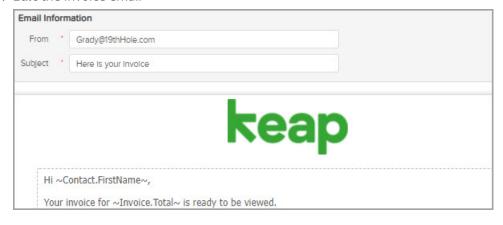


Warning: Keap customers should not attempt to create new subscriptions in the Create Order goal. Recurring payments in Keap will not be created when this form is submitted.

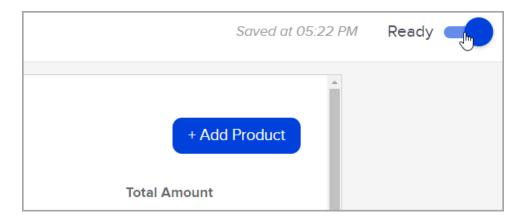
6. Choose a payment option



7. **Edit** the invoice email



8. Click the toggle to change the create order process from Draft to **Ready**



9. Complete and ${\bf publish}$ the rest of your automation.