

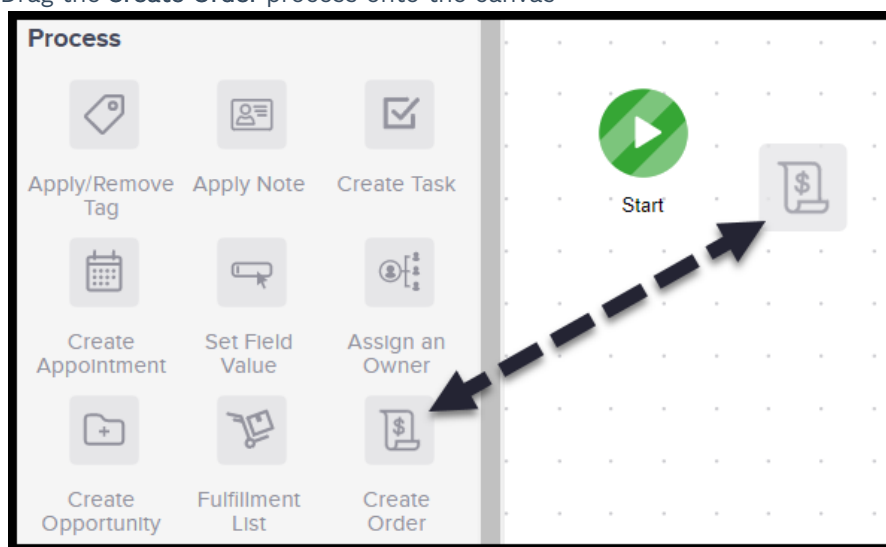
# Advanced Automation sequence - create order

This article applies to:

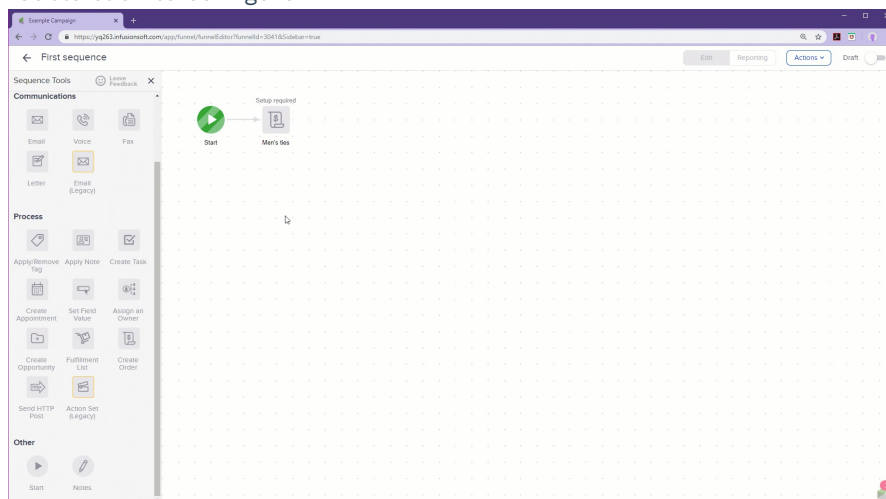
The **Create Order** sequence automates the order-to-invoice process, enabling you to automate yet another aspect of your business. You can add products, set up payment options, and preview and edit the invoice before it sends.

## How to configure the Create Order process

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

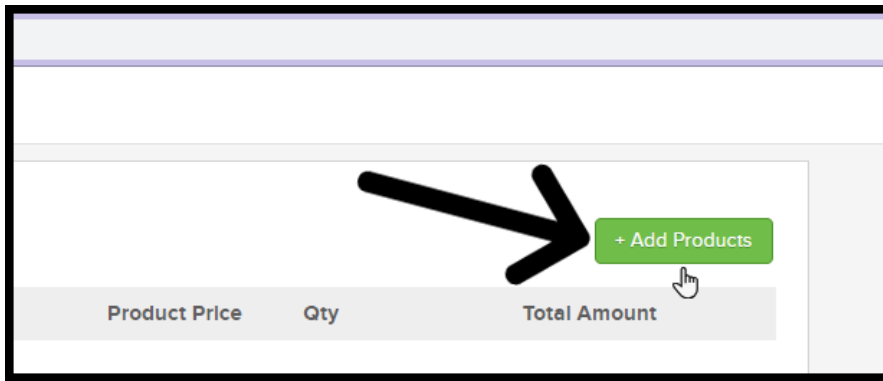


2. Double click to configure

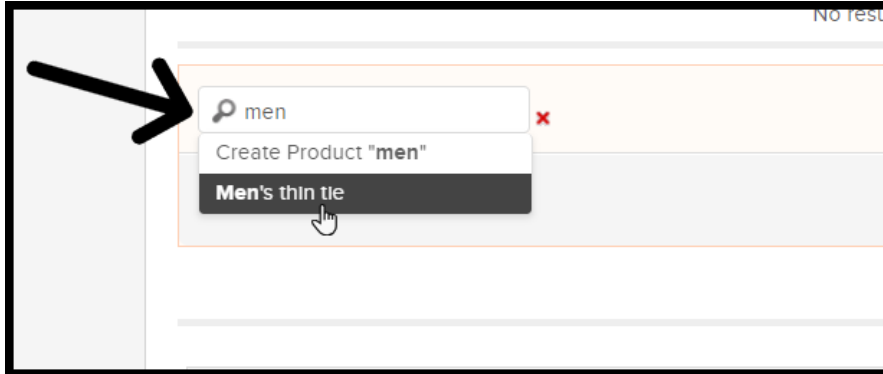


## Add products to the order

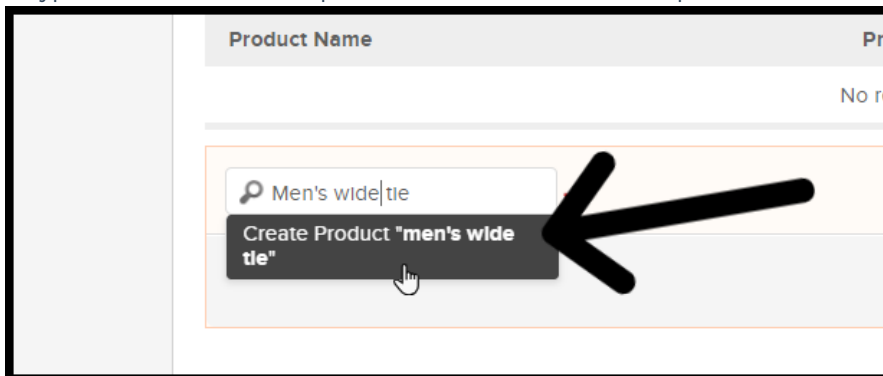
1. Click **+Add Products**



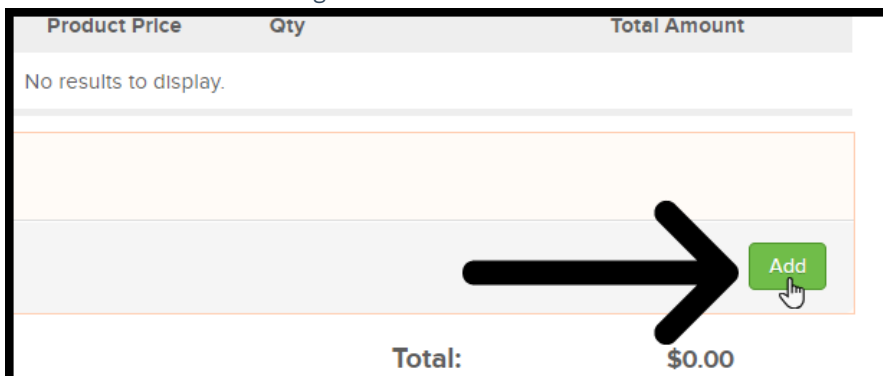
2. From the search located on the left type the name of the existing product



or type the name of a new product and create it on the spot



3. Click Add in the bottom right corner



**Note:** Keep 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.

## Auto pay Payment Options

- The **Auto Charge this Order** options and **Send Payable Invoice** option inside **Payment Options** will only be 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 that will be sent in the email containing their invoice

Top of email

Hi ~Contact.FirstName~,  
Your invoice for ~Invoice.Total~ is ready to be viewed. I hope you e|

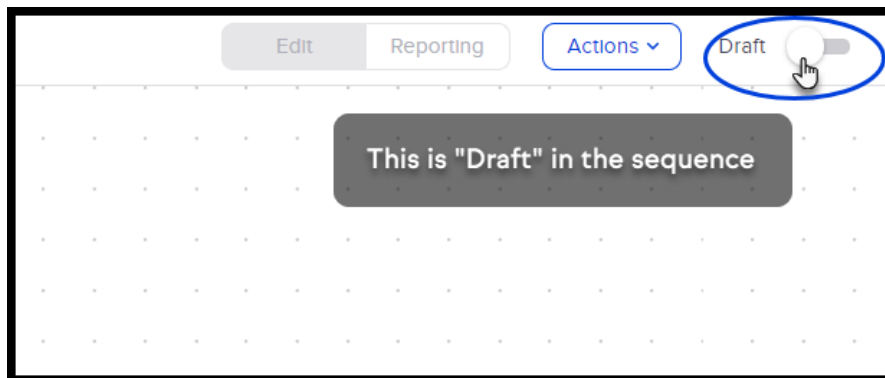
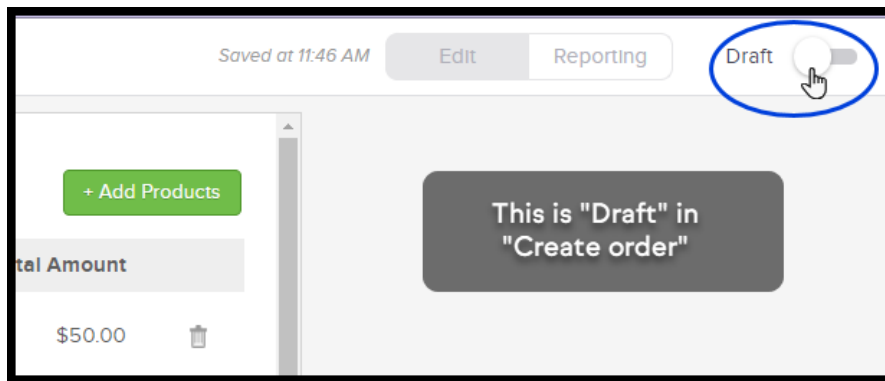
View my Invoice

Amanda Madsen  
Media  
[amanda.madsen@alwayshelpful.org](mailto:amanda.madsen@alwayshelpful.org)  
(414) 399-9899 - Mobile

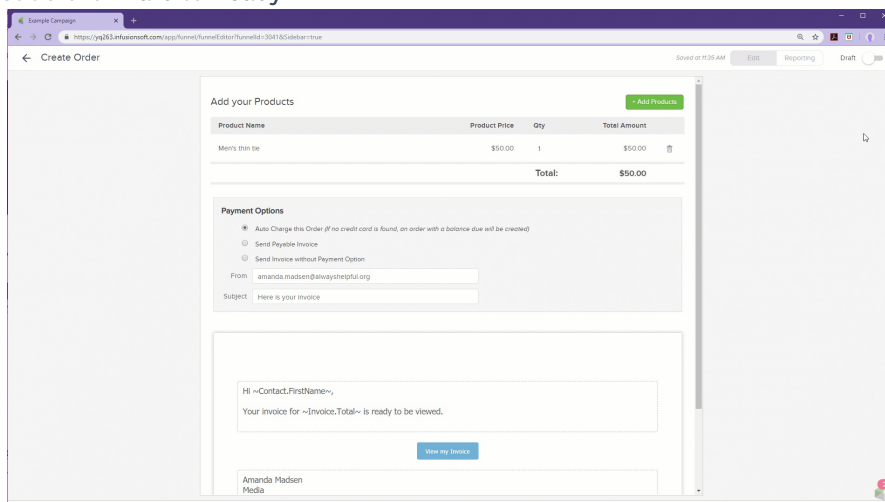
Bottom of email

## How to make your Create Order process and sequence 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