

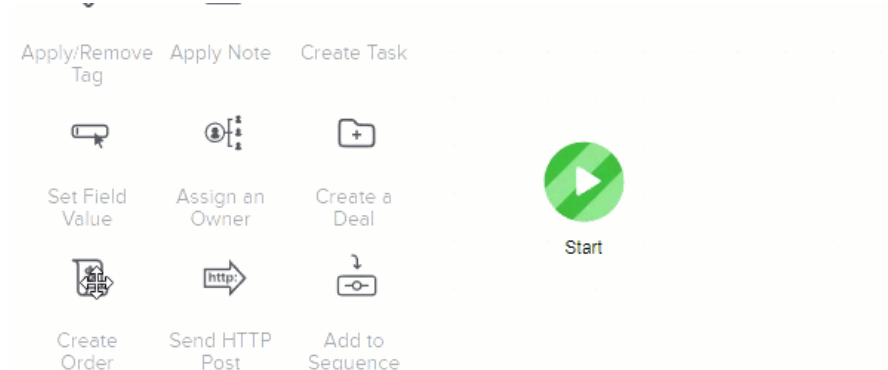
Advanced Automation sequence - create order

This article applies to:

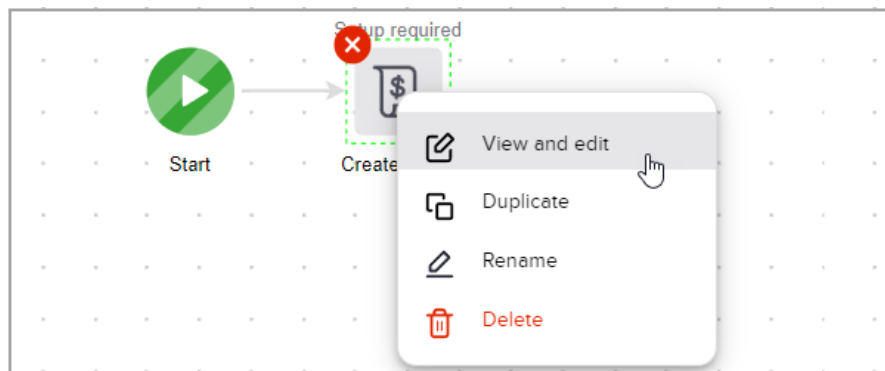
The **Create Order** process automates the creation of an invoice, enabling you to automate yet another aspect of your business. You can add products, set up payment options, and send the invoice to contacts that enter this process.

How to configure the Create Order process

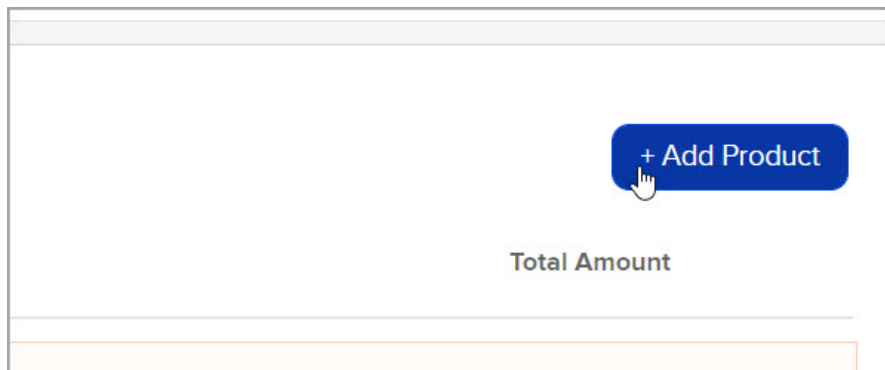
1. Drag the **Create Order** process onto the canvas



2. Click the icon and select **View and edit**



3. Click **+Add Products**



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

A search bar containing the text "Consulting Hours" with a magnifying glass icon on the left and a red "x" on the right. Below the search bar, a dropdown menu is open, displaying the text "Create Product 'consulting hours'" in a grey box.

5. Click **Add** in the bottom right corner

A form with a "Total Amount" label at the top. Below the label is a large empty rectangular field. In the bottom right corner of the form, there is a blue button with the word "Add" and a white hand cursor icon.

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

6. Choose a payment option

A section titled "Payment Options" in bold. Below the title are two radio button options:

- Send Payable Invoice
- Send Invoice without Payment Option

7. **Edit** the invoice email

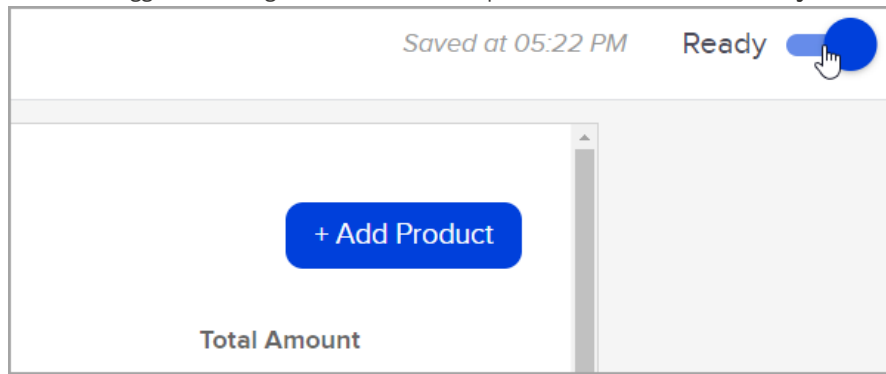
An email template editor interface. At the top, under "Email Information", there are two input fields:

- From: Grady@19thHole.com
- Subject: Here is your Invoice

Below these fields is a large green "keep" logo. At the bottom, there is a dashed-line box containing the email body text:

Hi ~Contact.FirstName~,
Your invoice for ~Invoice.Total~ is ready to be viewed.

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



9. Complete and **publish** the rest of your automation.
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