

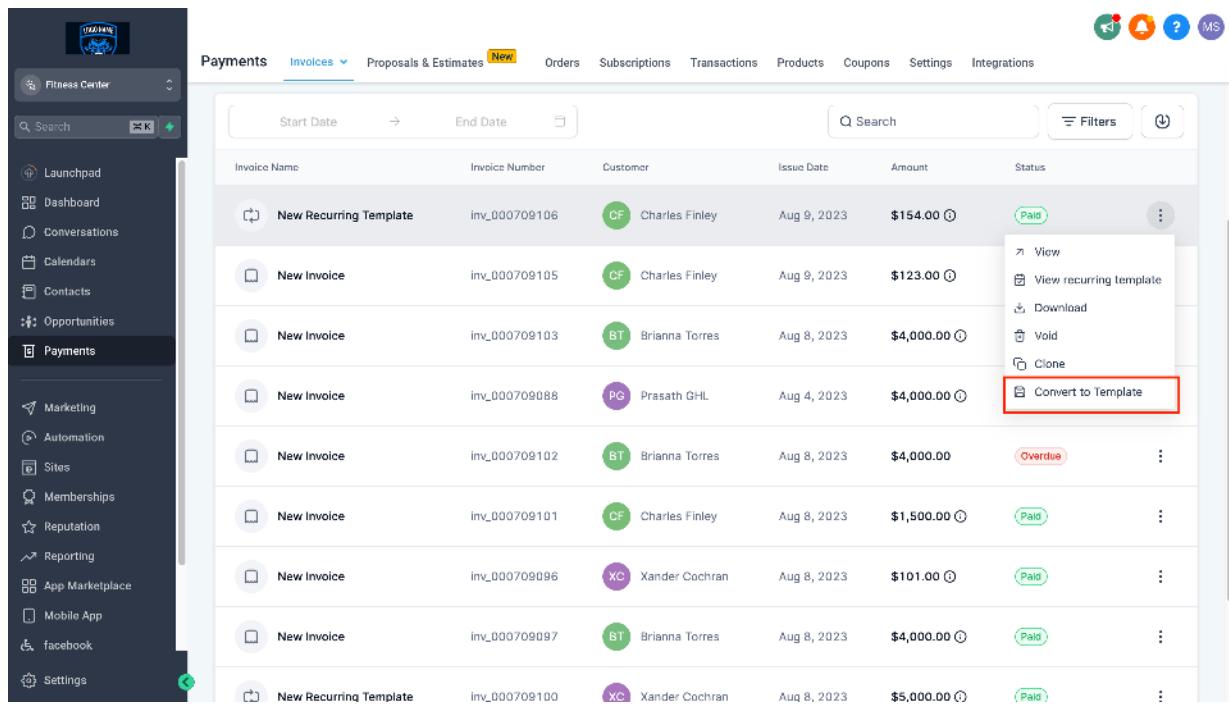
CTTK

Create Invoice templates and Send
invoices automatically inside
workflows



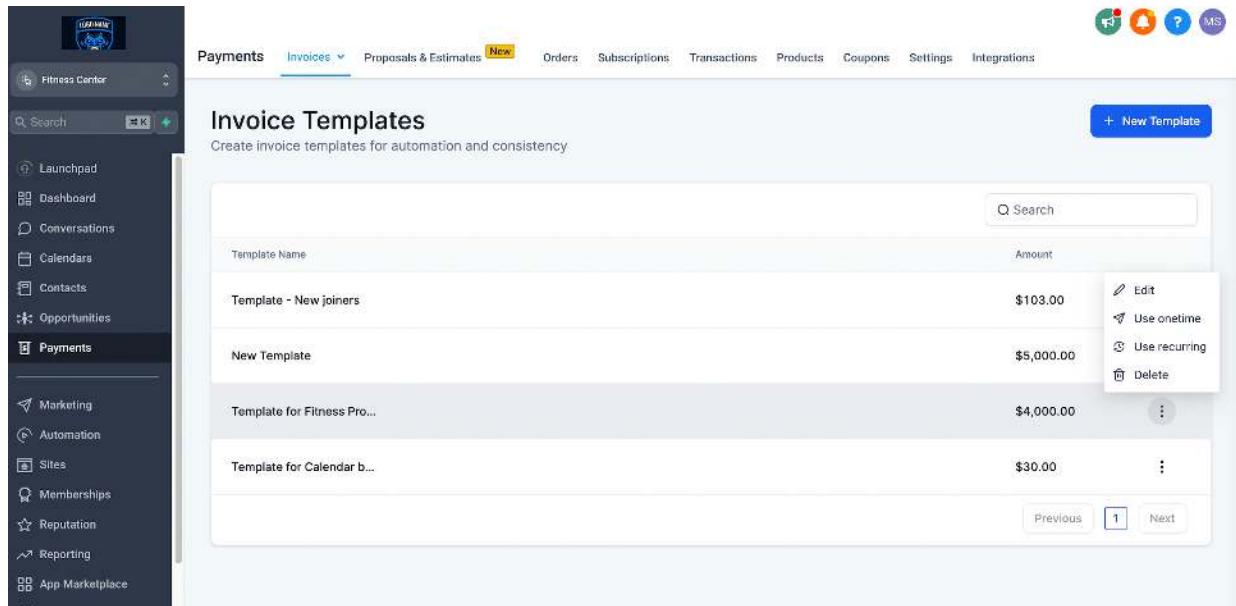
Create invoice templates and automatically send an invoice in a workflow using templates Print

- Businesses will now be able to create invoice templates. This will enable quick and easy creation of one-time/recurring invoices and will also enable sending invoices in a workflow using the same templates created
- This needs to be enabled at the sub-account level by heading under Settings -> Labs and turning the toggle on for the feature
- Users will be able to convert any invoice created into a template using the Convert to Template action and give an appropriate name to it for future references
- Templates can contain all information related to business information, logo, invoice title, product line items, taxes, discounts, and terms. Customer information will be populated along with the issue date and due date while sending the invoice as per the invoice settings
- All templates will be listed on the Templates page under the Invoicing section. Quick actions on the templates page will enable the use of the template as a one-time invoice or a recurring invoice
- Users will be able to modify, rename, or delete the templates at any point in time



The screenshot shows a software interface for managing invoices. The left sidebar includes a navigation bar with 'Fitness Center' at the top, followed by 'Launchpad', 'Dashboard', 'Conversations', 'Calendars', 'Contacts', 'Opportunities', 'Payments' (selected), 'Marketing', 'Automation', 'Sites', 'Memberships', 'Reputation', 'Reporting', 'App Marketplace', 'Mobile App', 'facebook', and 'Settings'. The main content area has a header with 'Payments', 'Invoices' (selected), 'Proposals & Estimates', 'Orders', 'Subscriptions', 'Transactions', 'Products', 'Coupons', 'Settings', and 'Integrations'. Below the header is a search bar and a 'Filters' button. The main table lists invoices with columns for 'Invoice Name', 'Invoice Number', 'Customer', 'Issue Date', 'Amount', and 'Status'. The table shows several entries, including 'New Recurring Template' and multiple 'New Invoice' entries for different customers like Charles Finley, Brianna Torres, and Xander Cochran. A context menu is open over the third 'New Invoice' entry for Prasath GHL, with options including 'View', 'View recurring template', 'Download', 'Void', 'Clone', and 'Convert to Template' (which is highlighted with a red box). The status for this invoice is '\$4,000.00' with a circled '0'.

Create Invoice templates and Send invoices automatically inside workflows



Template Name	Amount	Actions
Template - New joiners	\$103.00	Edit Use onetime Use recurring Delete
New Template	\$5,000.00	Edit Use onetime Use recurring Delete
Template for Fitness Pro...	\$4,000.00	Edit Use onetime Use recurring Delete
Template for Calendar b...	\$30.00	Edit Use onetime Use recurring Delete

Business users will be able to make use of the same templates to send an invoice in a workflow using the Send Invoice action

- Users will be able to make use of the templates created inside the invoice module to define the invoice details that need to go out to the customer. Turn the feature on in Labs under sub-account settings
- Business users will be able to configure the action name, select the From User to define the sender details, and choose a template from one of the templates created inside invoices along with the payment mode.
- The default/custom template configured inside the invoice settings will be used automatically to send the invoice from workflows as well
- This fulfills a lot of use cases like sending an invoice after an appointment is booked, opportunity status is changed, tag is attached to a contact or any other trigger existing

Create Invoice templates and Send invoices automatically inside workflows

Back to Workflows

Auto send an invoice

Builder Settings Enrollment History Execution Logs

Opportunity Status Changed Customer Booked Appointment

Add New Workflow Trigger

Add your first action

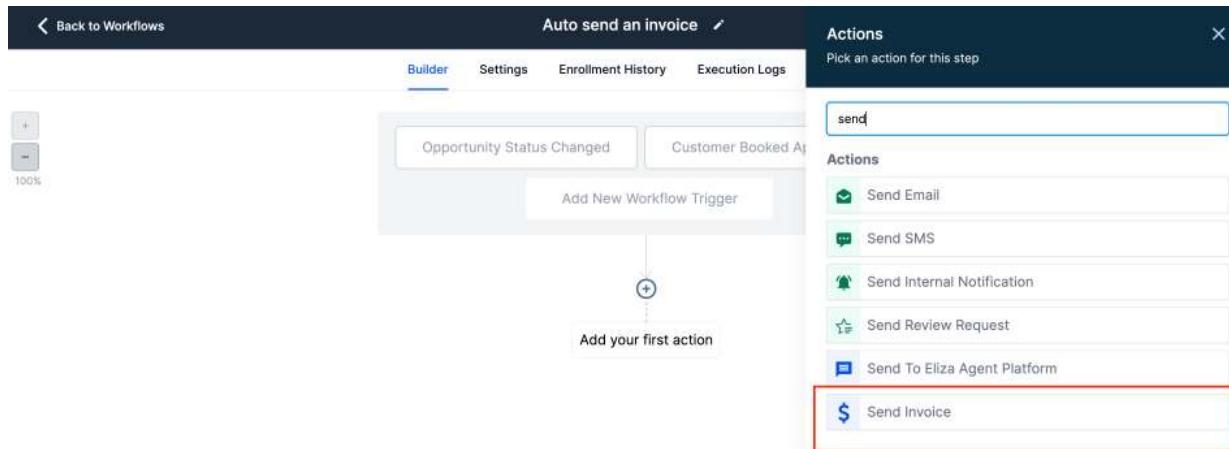
Actions

Pick an action for this step

send

Actions

- Send Email
- Send SMS
- Send Internal Notification
- Send Review Request
- Send To Eliza Agent Platform
- Send Invoice**



Back to Workflows

Auto send invoice

Builder Settings Enrollment History Execution Logs

Customer Booked Appointment Opportunity Status

Add New Workflow Trigger

\$ Send Invoice

ACTION NAME: Send Invoice

FROM USER: John Doe

INVOICE TEMPLATE: Auto send invoice template

PAYMENT MODE: LIVE TEST

Delete Cancel Save Action

