

Sending Invoices and Receipts

Last Modified on 06/06/2024 12:41 pm MDT

You'll have a few choices when it comes to providing documentation to your customers for their orders. You can email an invoice for orders that still have a balance due, or send a receipt if it's paid in full. Both options are available to print as well, but if you have the customers email address we suggest saving the paper and sending them electronically. Both options are also accomplished in the same way, but the button and title changes based on the amount due.

To start, browse your Orders page and find the one you want to work with. Click it, and you'll see two buttons in the upper right.

Email Invoice/ Email Receipt - The button will read Email Invoice if the payment status is currently due. It will show Email Receipt if the payment status is paid. Click it to start an email; the customer's email address is automatically added, and you'll have an opportunity to include a message. After sending the invoice, a note will be added to your customers record with the date the invoice was sent and the custom message you wrote.

If you are sending an invoice and want you customers to pay online, be sure you set up your Stripe credit card processing first, and your Quick Pay option. The invoice will include a QR Code to scan and pay the amount due.

Print - If you'd prefer to print an invoice to provide during delivery or send with their shipment, click the printer button to generate a printed copy.

The screenshot displays the Farmbrite interface for managing orders. The main content area is titled 'Orders/Invoices' and features a 'Create New' button and a search bar. Below this is a table listing individual orders with the following columns: ID, Ordered (with a dropdown arrow), Status, Customer, and Amount. Each row in the table includes a 'Status' column with multiple colored buttons and icons representing different stages of the order process. For example, some orders are 'In Progress' with 'Payment Due' and 'Delivery' buttons, while others are 'Complete' or 'Paid' with 'Delivery' and 'Due' date alerts. The 'Customer' column lists the customer's name and email address. The 'Amount' column shows the total value of the order. A sidebar on the left provides navigation for various farm management tasks, and the top navigation bar includes the Farmbrite logo, a search bar, and user account details.

ID	Ordered	Status	Customer	Amount
bde6a436ad	Mar. 05, 2023	In Progress Payment Due Delivery	Frank Grimes frankgrimes@springfieldnuclear.com	\$159.94
dd342e46ab	Mar. 05, 2023	Ordered Payment Due Delivery	Gary Chalmers chrismasella@gmail.com	\$194.98
37b3d31e0f	Oct. 01, 2023	In Progress Payment Due	Frank Grimes frankgrimes@springfieldnuclear.com	\$112.49
14ef424d9d	Mar. 01, 2023	Complete Paid Delivery Due: Mar. 06, 2023	Maurice Syzlak moe@springfieldbutchers.com	\$91.20
fb5386c8aa	Feb. 24, 2023	Ordered Payment Due Pick up	Mike Burkett mike@epitaphfarms.com	\$6.99
bf319883dc	Feb. 24, 2023	Ordered Payment Due Pick up	Tim Armstrong Tim@epitaphfarms.com	\$599.99
486a4318a1	Feb. 20, 2023	Ordered Payment Due Pick up	Frank Grimes frankgrimes@springfieldnuclear.com	\$27.99
2cf72cb33a	Feb. 17, 2023	Ordered Payment Due Pick up	Chris Kenneth chris@mailinator.com	\$16.90
69cfe62d4c	Feb. 17, 2023	Delivered Payment Due Delivery Due: Feb. 18, 2023	Maurice Syzlak moe@springfieldbutchers.com	\$129.90
c9986ba8a8	Feb. 15, 2023	Ordered Payment Due Pick up	Michael Burkett mike@epitaphfarms.com	\$6.95

