TotalInvoice User Manual

November 2026 · Prepared by Managed Cloud Solutions

What is TotalInvoice?

TotalInvoice is a Shopify app that automatically generates commercial invoices, customer invoices and quotes for your orders — correctly formatted for customs, VAT/EORI, and international shipping, without you having to build or fill in a document by hand.

It's built for merchants who ship internationally (so need proper commercial invoices with HS codes and customs declarations) and/or sell B2B via draft orders and quotes. Every real order can get two documents automatically — a full **Commercial Invoice** for customs, and a stripped-down **Customer Invoice** copy with no customs details — and every draft order can get a **Quote** PDF, with an in-app email send for all three.

Getting Started

Once the app is installed, open TotalInvoice from your Shopify admin's Apps menu and work through this checklist:

- ☐ **Choose a plan** under Settings → Billing — Free works right away with no approval step; Basic and Pro redirect you to Shopify's own billing confirmation page
- ☐ **Fill in Supplier Details** — at minimum your company name and address, since these print on every invoice
- ☐ **Add your logo and signature** (optional, but recommended — these appear on every generated document)
- ☐ **Set a Body font** (and a Header font if you want the document title in a different face to the body text)
- ☐ **Download a sample commercial invoice, customer invoice, and quote** from the bottom of Settings to check branding and fields before any real order arrives
- ☐ If you ship internationally and need customs documentation, work through the **Customs fields** section below (Composition metafield, Manufacturer ID)
- ☐ If you want invoices emailed to customers automatically, turn on **“Automatically email invoice to customer when order is placed”**

From this point, every new order is invoiced automatically — there's nothing further to do unless you want to review or email a document yourself.

Billing Plans

Plan	Price	Orders included	Destination-specific HS codes	Per-location split invoices	Custom sender domain
Free	$0	50 per rolling 30 days	No — generic HS code only	No	No
Basic	$14.99/mo	Unlimited	No — generic HS code only	No	No
Pro	$24.99/mo	Unlimited	Yes	Yes	Yes

Free activates immediately with no approval step. Basic and Pro ask you to confirm the subscription on Shopify's own billing page — both come with a 14-day free trial.

On Free, once you hit 50 orders in a rolling 30-day window, invoice generation stops until the window rolls over or you upgrade. Destination-specific HS codes (looking up the correct code for the actual ship-to country) and per-location split invoices are Pro-only — on Free or Basic you still get a valid invoice, just using each product's single default HS code and one invoice for the whole order rather than one per warehouse. Pro also lets you send invoice, quote and location-invoice emails from your own branded domain instead of the shared TotalInvoice address — see Custom sender domain under Sending an Invoice from an Order, below.

Supplier Details

Shown on every generated invoice — commercial, customer and quote alike.

Field	What it's for
Company name	Your business name, printed as the supplier
Address (one line per line)	Your full postal address, each line on its own row
VAT number	Your VAT registration number
EORI number	Your Economic Operators Registration and Identification number
Shipper's EIN / CAIN	Required by US Customs on DDP shipments of $2,500+ where you're the Importer of Record — your IRS EIN or CBP-assigned CAIN
Email / Phone	Your contact details
Declaration text	The customs declaration statement printed above your signature — comes with sample wording you can overtype
Signatory name / Signatory title	Who's signing the declaration, and their role
Quote validity (days)	How long a generated Quote stays valid from its issue date; leave blank to hide the expiry date on Quotes

All of these are optional except Company name and Address, which every invoice needs to be usable — but the more you fill in, the fewer warnings you'll see on generated invoices (see Troubleshooting).

Bank Transfer Details

If you take payment by bank transfer for any orders, set this up so the right account details print automatically.

- **Bank transfer details (default)** — one block of bank details (bank name, account name, sort code/routing number, account number, IBAN, SWIFT/BIC — whatever's relevant to your bank) used for any order currency that doesn't have its own entry below
- **Bank transfer details by currency** — add a separate account for any currency you take payment in. Pick a currency from the dropdown, click **Add**, and fill in that currency's own details. Remove a row with its **Remove** button.

TotalInvoice matches on the **order's own currency** (whatever's set on the order itself), not the customer's billing country — so a GBP-priced order always shows your GBP details even if the customer's address is in the US.

When bank details actually appear: only on a Commercial or Customer invoice, and only when the order is **not already marked paid**. An order paid through normal Shopify checkout never shows bank details — there's nothing left to pay. Bank details never appear on a Quote at all, regardless of payment status, since a quote is a pre-sale document.

Branding

- **Logo** — upload an image file; it appears on every generated document
- **Signature** — upload an image of your signature; it appears beside the Signatory name/title on commercial and customer invoices
- **Body font** — the typeface used for the bulk of each document; choose from 12 options (EB Garamond, Roboto, Open Sans, Montserrat, Lato, Poppins, Merriweather, Playfair Display, Source Sans 3, Nunito, Raleway, English Egyptian) or leave on Default
- **Header font** — the typeface used for the document's title (“Commercial Invoice”, “Invoice”, or “Quote”, whichever is being printed); leave on “Same as body font” unless you want a distinct display face there

Use the **Download sample commercial invoice / customer invoice / quote** buttons at the bottom of Settings to see exactly how your branding choices look before any real order exists.

Customs Fields

Composition / material

Each invoice line can show the product's material composition (e.g. “100% cotton”) — required on many customs declarations. Set the **Composition/material metafield** dropdown to whichever product metafield already holds this on your store, or use the default: TotalInvoice can read from its own auto-created metafield (namespace `commercial_invoice_app`, key `composition`, type “Single line text”) if you fill that in on each product.

Manufacturer ID (MID)

US Customs requires a Manufacturer ID Code on formal entries for textile/apparel products. TotalInvoice builds this automatically, per line, whenever the product has all three of these metafields set (all under namespace `commercial_invoice_app`):

Metafield key	Holds
`manufacturer_name`	The manufacturer's name
`manufacturer_street`	The manufacturer's street address
`manufacturer_city`	The manufacturer's city

There's no Settings-UI field for this — create the three metafields on your products directly in Shopify admin, and the MID appears automatically on any invoice line where all three are present.

Automatic Invoice Generation

As soon as a real order is placed, TotalInvoice generates **two PDFs** automatically — no action needed:

- **Commercial Invoice** — the full customs copy, including HS codes, country of origin, composition, Manufacturer ID, and your customs declaration/signature block
- **Customer Invoice** (printed title: “Invoice”) — the same order, but with every customs-only field removed, suitable for sending straight to the customer

Both are generated together and stored, ready to view or email, every time — you never have to choose which one to generate.

Which document the Print menu opens by default: if the order was created by converting a draft order (e.g. a B2B quote turned into an order), the Print Action Extension (see below) defaults to showing “Customer Invoice” as the title and opening the customer-copy PDF. This is just the default view in that one panel — it isn't a judgement that the order is domestic. The full **Commercial Invoice** is still generated for every order regardless of source, and stays available from Settings → Generated Invoices → Commercial PDF, so an international sale that happened to go through a draft order still has its customs copy ready whenever you need it.

Generation needs an active subscription and, on Free, counts against your 50-orders/30-day cap. An order with no shipping address or no line items is silently skipped — not treated as an error.

Sending an Invoice From an Order

Open any order in Shopify admin, then open its native **Print** menu — TotalInvoice adds itself there.

1. The panel shows “Preparing invoice…” while it generates (or fetches) the invoice, then displays the title — **Commercial Invoice** for a normal order, or **Customer Invoice** for an order that came from a draft order
2. The PDF loads straight into Shopify's own print preview, ready to print
3. Click **Send by Email** to open a **Review & Send** panel, pre-filled with:
   - **To** — the customer's email
   - **Subject** — defaults to “Your invoice from {your company name} – order {order number}”
   - **Message** — defaults to “Please find attached your invoice for order {order number}.”
4. Edit any of these fields if you want to, then click **Send** — the button shows “Sending…”, then confirms **“Sent to {email}”** or shows **“Send failed: {error}”**

The email always attaches the **Customer Invoice** copy — never the Commercial Invoice, even for an invoice generated before customer-copy PDFs existed (2026-10-28). If that copy is missing for any reason, the send fails with a clear error rather than ever substituting the commercial document. If the order has no customer email on file, **Send by Email** is disabled.

If you turned on **“Automatically email invoice to customer when order is placed”** in Settings, this same email goes out on its own when the order comes in — you only need to use this panel for a resend or a manual send.

Orders tagged “manual” are never auto-sent: if the order carries a **“manual”** tag — for example a draft order you marked as paid yourself rather than one paid through a real customer checkout — the invoice still generates as normal, but the automatic email is skipped even with the toggle on. This avoids emailing an invoice to a customer for an order your team entered on their behalf. You can still send it yourself any time from this panel or from Settings → Generated Invoices.

How these emails are actually sent: TotalInvoice sends the email itself, directly — whether triggered automatically or by you clicking Send. It doesn't use Shopify's own notification system, and it's unrelated to any notification-template app you may have installed (like Orderly Emails, which only customizes Shopify's *own* native emails such as “Order confirmation” — it has no visibility into what TotalInvoice sends). Practically:

- The email comes **from TotalInvoice's own address**, not your store's domain — the display name uses your Company name from Supplier Details if you've filled it in, otherwise “TotalInvoice”
- **Replies go to you** — the Email field in Supplier Details is set as Reply-To, so a customer replying reaches you even though the send itself didn't come from your domain

On the **Pro plan**, you can replace this with your own domain instead: Settings → Supplier Details → **Custom sender domain**. Enter a sender email address (e.g. `invoices@yourdomain.com`) and click **Set up** — TotalInvoice registers your domain with SendGrid and shows you the DNS records (CNAMEs) to add at your domain registrar. Once you've added them, click **Verify**. It can take a little while for DNS changes to propagate, so if verification fails at first, wait and try again. Once verified, every invoice/quote email sends from your own address instead of the shared one — click **Reset to default** at any time to go back to the shared address.

Quotes From Draft Orders

Open a draft order, then its **More actions** menu, and choose **Quote**.

1. Click **Generate PDF** — builds a Quote fresh from the draft order's current contents (products, discounts, shipping, payment terms)
2. Once ready, click **Download PDF** to view it
3. Click **Send Quote** to open the same Review & Send panel as invoices, pre-filled with:
    - **Subject** — defaults to “{your company name} – Quote for your Order {order number}”
    - **Message** — defaults to “Thank you for your enquiry. Please find attached your quote for order {order number}.”
4. Edit if needed, then **Send** — confirms **“Sent to {email}.”** or shows an error

A Quote never shows customs fields, a Paid/Due box, or bank transfer details — it's a pre-sale document. It shows a validity date instead, based on your **Quote validity (days)** setting.

Quotes are never saved or cached — every Download or Send rebuilds the PDF from the draft order's live contents, so it always matches what's actually on the draft right now, even if you've edited it since the last click. Generating or sending a Quote also tags the draft order **“manual”** in Shopify (alongside any existing tags).

Fulfillment Location Invoices (Pro plan)

If an order's items are split across more than one of your warehouses/locations, TotalInvoice can generate a separate invoice per location — each covering only that location's own items, as a **full commercial invoice**: Subtotal, Shipping, Tax and Total, not just a bare list of items. Tax is the real sum of that location's own lines' tax; Shipping is the order's shipping cost split proportionally by each location's share of the order's value (a location with 70% of the order's value carries 70% of the shipping line). Ship To and Bill To still show the real customer, not the warehouse.

This feature is **Pro-plan only** — it won't generate on Free or Basic even if you've set up contacts below.

Set a contact per location: Settings → Fulfillment location contacts. Shopify doesn't have a built-in email field for a location, so add one here — enter a contact email and name for each location, then click that row's **Save**.

Choose when they're generated: Settings → “Generate fulfillment-location split invoices” (Pro plan only):

- **When the order is placed** (default) — generated as soon as Shopify assigns items to locations, regardless of payment status
- **When the order is marked as paid** — generated only once payment is confirmed

Either way, **auto-send only ever happens once the order is paid**, and only to locations with a contact email configured — so a location invoice can exist before payment, but it won't be emailed out ahead of actual payment. If a location has no contact set, its invoice sits unsent until you send it manually.

Where to Find Your Documents

Generated Invoices (Settings) lists every main invoice: Order, Invoice #, Generated date, Warnings, Email status, and three buttons — **Commercial PDF**, **Customer PDF**, **Send email** (greyed out if there's no customer email on file). The Email column shows “Sent to {email} at {datetime}” or “Not sent”. Clicking **Send email** re-sends regardless of whether it's already been sent — there's no separate “resend” button.

Fulfillment Location Invoices (Settings) lists every per-location invoice the same way, with an extra **Location** column, and **PDF** / **Send email** buttons. Its Email column shows “Sent to {email} at {datetime}” or “Not sent” — these go to the location's own contact, not the customer.

Both lists are collapsible — click the section heading to fold them out of the way once you know what you're looking for.

Email Send History

Every email TotalInvoice sends is logged right on the order (or draft order) it belongs to — not just the “last sent to X” line in the Settings lists, but a full history including failed attempts, each with a real **View email** link to the exact email that went out.

Where to find it: open the order (or draft order), scroll to **Blocks**, and if it's not already there, click **+ Block** → **TotalInvoice emails**. The first time you add it, click the **pin icon** next to it — otherwise it only shows for that one page view and disappears on reload. Once pinned, it stays on that order/draft order page going forward.

What it shows: date, type (Invoice/Quote/Location invoice), recipient, status (Sent/Failed), and a **View email** link — click it to open the exact subject, message body, and a PDF download of what was actually sent, in a new tab.

Who can see it: only staff who already have permission to view Orders in your Shopify admin (Settings → Users and permissions) — never customers, who have no access to your store's admin at all.

Warnings & Troubleshooting

Each row in the invoice lists can show a collapsible **“{N} warning(s)”** disclosure — expand it to see the specific lines affected. The common causes are:

Warning	Fix
Missing HS code	Set an HS code on the product in Shopify (or a destination-specific override, on Pro)
Missing country of origin	Set the product's country of origin in Shopify
Missing composition	Fill in the composition metafield for that product (see Customs Fields)

None of these block the invoice from generating — they're flags for you to fix the underlying product data, not errors.

An invoice didn't generate at all:

- Check Settings → Billing — you need an active plan; on Free, check you haven't hit the 50-orders/30-day cap
- Check the order actually has a shipping address with a country, and at least one line item — TotalInvoice silently skips orders missing these rather than erroring

Send by Email is greyed out: the order has no customer email on file — this only applies to the main invoice send, not the Fulfillment Location Invoices send, which isn't gated this way.

A field doesn't show on the PDF: some fields in the underlying invoice format (e.g. Incoterm, buyer tax ID, payment method, shipping method) aren't wired up in TotalInvoice specifically and will never appear, even if you see them referenced elsewhere — if something you need isn't listed in this manual, it isn't currently supported.

We always welcome suggestions for improvements or amendments to TotalInvoice — please send them to support@totalinvoice.co.uk. For the regulatory background behind the customs fields TotalInvoice includes, see our Compliance & Legislation Reference.

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