

# Invoice Templates – Retail & Direct Sales

## Ready-to-Use Templates for In-Store and Online Orders

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### Overview

These templates are for retail transactions, online orders, and direct sales. They're simpler than corporate invoices but still professional and branded. All should be created in Google Docs and exported as PDF for customer records.

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### Template 1: Receipt – In-Store Purchase

CHOCOLAT ON JAMES

123 James Street South  
Hamilton, ON L8P 2A1  
Phone: [phone]

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RECEIPT

DATE: [Date]  
TIME: [Time]  
RECEIPT #: [###]  
CASHIER: [Name/Staff ID]

---

ITEM(S)

[Product] : Qty [#] × \$[unit price] = \$[total]  
[Product] : Qty [#] × \$[unit price] = \$[total]

---

SUBTOTAL: \$[amount]  
HST: \$[amount]  
TOTAL: \$[amount]

---

PAYMENT METHOD: [Cash / Credit Card / Debit]

---

Thank you for your purchase!

Follow us on Instagram: [@handle]  
Sign up for our newsletter: [link]

[Optional: "See you next week!" or seasonal message]

---

Questions? Call us at [phone] or email [email].

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## Template 2: Email Receipt – Online Order

**Subject:** Your Chocolat on James Order Confirmation – Order #[###]

Hi [Customer Name],

Thank you for your order! Here's your confirmation.

---

ORDER #: [###]

ORDER DATE: [Date]

ESTIMATED DELIVERY: [Date Range]

---

### ITEMS

[Product Name] (Qty: [#]) - \$[amount]

[Product Name] (Qty: [#]) - \$[amount]

---

SUBTOTAL: \$[amount]

Shipping: \$[amount] [or "FREE SHIPPING"]

HST: \$[amount]

TOTAL: \$[amount]

---

### SHIPPING ADDRESS

[Customer Address]

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WHAT'S NEXT?

1. Your order is being prepared for shipment.
2. You'll receive a tracking number via email within [timeframe].
3. Estimated delivery: [date range].

---

QUESTIONS?

Reply to this email or contact us at [phone]. We're happy to help.

Thanks for supporting artisanal chocolate!

[Your Name]  
Chocolat on James  
[Website]

---

**Template 3: Packing Slip – Order Fulfillment**

PACKING SLIP

CHOCOLAT ON JAMES  
Order Fulfillment

---

ORDER #: [###]  
ORDER DATE: [Date]  
SHIP DATE: [Date]

CUSTOMER:

[Name]  
[Address]  
[Phone / Email]

---

ITEMS IN THIS SHIPMENT

Qty	Product Name	SKU	Notes
[#]	[Product]	[SKU]	[Notes, e.g., "Please refrigerate upon arrival"]
[#]	[Product]	[SKU]	

---

TOTAL ITEMS: [#]

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SPECIAL INSTRUCTIONS

[If applicable, e.g., "Keep away from heat" or "Fragile - handle with care"]

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THANK YOU

We hope you enjoy your chocolate. If there are any issues, please let us know at [email] or [ph]

Follow us on Instagram for updates and new releases: [@handle]

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[Tracking info to be added separately]

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**Template 4: Invoice – Bulk/Subscription Order**

CHOCOLAT ON JAMES

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SUBSCRIPTION ORDER INVOICE

CUSTOMER: [Name]

SUBSCRIPTION ID: [ID]

INVOICE #: [###]

DATE: [Date]

BILLING PERIOD: [Date Range]

---

MONTHLY SUBSCRIPTION

Description: [e.g., "Quarterly Tasting Box Subscription"]

Frequency: [Monthly/Quarterly/Annual]

Unit Price: \$[amount]

Quantity: 1

Total: \$[amount]

---

SUBTOTAL: \$[amount]  
Shipping: [Included/Amount]  
HST: \$[amount]  
TOTAL: \$[amount]

---

#### PAYMENT METHOD

[Method used on file, e.g., "Visa ending in 4242"]  
Charged on: [Date]

---

#### NEXT SHIPMENT

Expected: [Date]  
Items: [Description]

---

#### MANAGE YOUR SUBSCRIPTION

To skip a month, pause, or change your subscription:  
[Link to account dashboard or contact info]

---

Questions? Contact us at [email] or [phone].

Thanks for being a subscriber!

[Your Name]  
Chocolat on James

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#### Template 5: Gift Purchase Invoice

#### GIFT PURCHASE INVOICE

CHOCOLAT ON JAMES

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PURCHASED BY:  
[Purchaser Name]

[Email/Phone]

GIFT RECIPIENT:

[Recipient Name]  
[Address]

---

ORDER #: [###]

DATE: [Date]

---

GIFT ITEMS

[Product] : \$[amount]

[Product] : \$[amount]

---

SUBTOTAL: \$[amount]

Shipping: \$[amount] [or "LOCAL DELIVERY INCLUDED"]

HST: \$[amount]

TOTAL: \$[amount]

---

GIFT MESSAGE

[If included: Print the gift message here, or note "Handwritten card included"]

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DELIVERY

Expected Delivery: [Date]

To: [Address]

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Thank you for your gift purchase. A special delivery card has been included with this order.

[Your Name]  
Chocolat on James

## Template 6: Refund/Return Invoice

REFUND AUTHORIZATION

CHOCOLAT ON JAMES

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CUSTOMER: [Name]

ORIGINAL ORDER #: [###]

REFUND #: [###]

DATE: [Date]

---

REASON FOR REFUND

[Reason: Defective, Wrong Item, Changed Mind, etc.]

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ORIGINAL CHARGE

Amount: \$[amount]

Payment Method: [Method]

REFUND AMOUNT

Amount: \$[amount]

Reason for Adjustment: [If less than full amount]

---

PROCESSING

Refund Status: [Processed / Pending / Completed]

Timeline: [Estimated 3-5 business days to appear in your account]

---

RETURN INSTRUCTIONS

[If item is being returned: "Please send item to: [address] with tracking confirmation."]

---

If you have questions about this refund, please contact us at [email] or [phone].

We appreciate your business, even when things don't work out.

[Your Name]  
Chocolat on James

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### Template 7: Loyalty Program Invoice / Credit

LOYALTY REWARDS REDEMPTION

CHOCOLAT ON JAMES

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CUSTOMER: [Name]  
LOYALTY ID: [ID]  
DATE: [Date]

---

#### REDEMPTION DETAILS

Points Redeemed: [#]  
Credit Applied: \$[amount]

Order #: [###]  
Original Subtotal: \$[amount]  
Loyalty Discount: -\$[amount]  
New Total: \$[amount]

---

#### REMAINING BALANCE

Points Remaining: [#]  
Dollar Value: \$[amount]

---

#### NEXT REWARDS TIER

[If applicable: "You're [#] points away from earning a free tasting box!"]

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Thank you for your loyalty. Every purchase earns you closer to your next reward.

[Your Name]  
Chocolat on James

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## Template 8: Event/Catering Invoice

### EVENT CATERING INVOICE

CHOCOLAT ON JAMES

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CLIENT: [Name / Company]

EVENT: [Event Name]

EVENT DATE: [Date]

INVOICE #: [###]

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### CATERING DETAILS

Service: [Description, e.g., "Chocolate Tasting Experience for 25 guests"]

Date: [Date]

Duration: [Time range]

Location: [Address]

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### ITEMIZED CHARGES

Base Catering (25 guests): \$[amount]

Premium Selections (upgrade): \$[amount]

Delivery Setup: \$[amount]

Tasting Guide & Materials: \$[amount]

---

SUBTOTAL: \$[amount]

HST: \$[amount]

TOTAL: \$[amount]

---

### TERMS

- 50% deposit due upon booking. 50% due 48 hours before event.
- Final headcount due 1 week prior.

- Cancellation within 7 days is subject to full charge.

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#### PAYMENT

Amount Due: \$[amount]

Due Date: [Date]

Payment Method: [As arranged]

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#### WHAT TO EXPECT

- [Staff arrival time and setup]
- [Tasting format and timing]
- [Cleanup/post-event process]

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Questions? Contact us at [phone] or [email].

We're excited to make your event memorable!

[Your Name]  
Chocolat on James

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#### Template 9: Wholesale / B2B Invoice

##### WHOLESALE INVOICE

CHOCOLAT ON JAMES  
Wholesale Division

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WHOLESALE ACCOUNT: [Business Name]

INVOICE #: COJ-WS-[###]

DATE: [Date]

TERMS: [Net 30/60]

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##### ITEMS

SKU	Product	Qty	Unit Cost	Total
[SKU]	[Product]	[#]	\$[amount]	\$[amount]
[SKU]	[Product]	[#]	\$[amount]	\$[amount]

---

SUBTOTAL: \$[amount]  
Wholesale Discount: -\$[amount] ([%])  
Adjusted Subtotal: \$[amount]  
Shipping: \$[amount]  
HST: \$[amount]  
TOTAL: \$[amount]

---

#### PAYMENT TERMS

Due Date: [Date, e.g., 30 days from invoice]  
Late Payment Interest: [%] per month

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#### DELIVERY

Expected Shipment: [Date]  
Tracking: [Will be sent separately]

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#### ACCOUNT NOTES

[Minimum reorder amounts, pricing tiers, contact person, etc.]

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Questions? Contact our wholesale team at [email] or [phone].

[Your Name]  
Chocolat on James - Wholesale

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#### Implementation Notes

**For In-Store Purchases:** - Print receipts on standard thermal receipt paper (80mm or 3-inch width). - Include your logo and branding at the top. - Keep receipts simple and scannable—customers won't keep them long.

**For Online Orders:** - Send email receipt immediately upon order confirmation. - Include order

number prominently for easy reference. - Provide tracking info and delivery estimate.

**For Subscriptions/Recurring:** - Send invoice each billing period automatically. - Make it easy to manage (link to account page or include contact for support).

**General Best Practices:** - Always include your contact information. - Be clear about what happens next (shipping timeline, delivery date, etc.). - Thank the customer genuinely (not just “thanks for the transaction”). - Include a way for them to reach you with questions.

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## Customisation

All templates should be: 1. Created in Google Docs with your branding applied. 2. Exported as PDF for a professional look. 3. Either printed directly or sent digitally depending on transaction type. 4. Stored in organized folders for bookkeeping and customer service reference.

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**Status:** Ready to deploy. Customize with your company details and use as needed.

**Next Phase:** Integrate with your point-of-sale system or eCommerce platform to auto-generate invoices where possible.