

Important Settings

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Post-Installation, there are several common settings that should be reviewed and adjusted as necessary. Time permitting, it's a good idea to go through all the settings for the system and company under [Settings]. Documentation on all the settings can be found under [Settings Rundown](#).

Company Specific

Localization

Localization (L10n) settings can be found under [Settings] > [Company] > [General] > Localization.

- Set the default language.
- Set the calendar start date.
- Set the timezone.
- Set the default country.

Localization

Default Language

Español, ES

☒ Client may set Language

Calendar Start Day

☒ Sunday

☐ Monday

Timezone

(UTC -07:00 DST) Los Angeles

Date Format

M d, Y

Jun 12, 2019

Date Time Format

M d, Y g:i:s A

Jun 12, 2019 11:23:37 AM

Default Country

United States

Update Settings

Invoice and Charge Options

Invoice and Charge Options settings can be found under [Settings] > [Company] > [Billing/Payment] > Invoice and Charge Options. These settings can also be specified on the client group level, so any changes here only affect client groups who *inherit* their settings from the company, which is the default behavior.

- Set the number of days in advance invoices are created.
- Set when to process automatic payments.
- Set how many days past due before a service is suspended.

Invoice and Charge Options

Invoice Days Before Renewal

5 Days

Auto Debit Days Before Due Date

1 Day

Suspend Services Days After Due

7 Days

Auto Debit Attempts

1 ?

Cancel Service Changes Days After Due

6 ?

☒ Enable Auto Debit

☒ Allow Client to Set Invoice Method

☒ Invoice Suspended Services

☐ Invoice Services Together ?

☒ Allow Clients to Cancel Services

☒ Allow Addon Services to be Synchronized with their Parent Services ?

☒ Allow Clients to Create Addons for Existing Services

☒ Allow Clients to Change Service Terms

☒ Allow Clients to Change Service Package

☒ Allow Prorated Credits to be Issued for Service Downgrades

☒ Automatically Apply Loose Credits

☒ Automatically Provision Paid Pending Services

☒ Void Open Invoices on Service Cancellation ?

Void Open Invoices Days After Due

- Any - ?

☐ Show the Tax ID Field in the Client Interface

☒ Queue Service Changes Until Paid ?

Update Settings

Invoice Customization

Invoice Customization settings can be found under [Settings] > [Company] > [Billing/Payment] > Invoice Customization.

- Set invoice formats, start value, increment value, and padding.
- Add a logo and/or background image to invoices.
- Set the terms.
- Set the paper size.
- Set the invoice template (Blesta ships with two different templates, Default and Quickbooks).
- Set whether the Logo, Company Name/Address, or PAID watermark appear on invoices.

Invoice Customization

Basic Options

Invoice Format

PD-(num)-(year)-(month)-(day) ?

Invoice Draft Format

DRAFT-(num)-(year)-(month)-(day) ?

Invoice Start Value

1 ?

Invoice Increment Value

1 ?

Invoice Type

Standard

Look and Feel

Logo

Browse... No file selected.

Background

Browse... No file selected.

Paper Size

Letter

Invoice Template

Default

Invoice File Type

PDF

English, US

Español, ES

Font Family

dejavusanscondensed ?

Terms

Display on Invoice

☒ Logo
☒ Company Name/Address
☒ PAID Watermark
☒ Payments/Credits
☒ Date Due - Drafts
☒ Date Due - Pro Forma
☒ Date Due - Standard

Payment Due Notices

Payment Due Notices settings can be found under [Settings] > [Company] > [Billing/Payment] > Payment Due Notices. Up to three notices can be sent, and used as payment reminders (before) or late notices (after), in relation to the invoice due date.

Notices

Notices can be used as late notices, or payment reminders.

☒ Allow Payment Notices to be Sent ?

First Notice

2 Days Before After Invoice Due Date

Edit Email Template

Second Notice

2 Days Before After Invoice Due Date

Edit Email Template

Third Notice

2 Days Before After Invoice Due Date

Edit Email Template

Auto-Debit Pending Notice

1 Day

Edit Email Template

Update Settings

Payment Gateways


Available Payment Gateways can be found under [Settings] > [Company] > [Payment Gateways] > Available. A payment gateway must be installed in order to accept live payments. Once a payment gateway is installed, it can be configured and later found under Settings > Company > Payment Gateways > Installed.

Gateways

Installed

Available

Merchant




Authorize.Net (ver 1.6.0) [Signup](#)

Author: [Phillips Data, Inc.](#)

Supports: ACH, ACH offsite, Credit Card, Credit Card offsite

Install




BluePay (ver 1.1.0) [Signup](#)

Author: [Phillips Data, Inc.](#)

Supports: Credit Card, ACH

Install




Braintree (ver 1.1.0)

Author: [Phillips Data, Inc.](#)

Supports: Credit Card

Install




Converge (ver 1.1.0)

Author: [Phillips Data, Inc.](#)

Supports: Credit Card

Formerly VirtualMerchant

Install




eWAY (ver 1.2.0)

Author: [Phillips Data, Inc.](#)

Supports: Credit Card

Install



PayPal Payflow Pro (ver 1.1.0)

Author: [Phillips Data, Inc.](#)

Supports: Credit Card

Install

Email Templates

Email Templates can be found under [Settings] > [Company] > [Emails] > Email Templates. This section includes all emails sent by the system to clients, staff members, and those added by plugins. By default, these templates usually don't have to be modified, but it's a good idea to review them in detail anyway. See [Customizing Emails](#) for more information.

Edit Email Template Invoice Delivery (Unpaid)

English, US

From Name
Billing Department

From Email
billing@account.blesta.com

Subject
Invoice Due

Available Tags
{contact.first_name} {contact.last_name} {invoices} {autodebit} {client_url} {payment_account.first_name} {payment_account.last_name} {payment_account.account_type} {payment_account.last4}

HTML
Text

Source

B I U S x₂ x² I_x

Styles

Format

Font

Size

A- A+

Hi {contact.first_name},

An invoice has been created for your account and is attached to this email in PDF format.

{% for invoice in invoices %}

Invoice #: {invoice.id_code}

{% if autodebit %}{% if payment_account %}{% if invoice.autodebit_date_formatted %}Auto debit is enabled for your account, so we'll automatically process the card you have on file on {invoice.autodebit_date_formatted} unless payment has been applied sooner.{% else %}If you would like us to automatically charge your card, login to your account at http://{client_url} to set up auto debit.{% endif

Signature
Billing

☒ Include Any Attachments ?

☒ Enabled

Cancel
Update Template

Signatures

Signatures can be found under [Settings] > [Company] > [Emails] > Signatures. Three signatures exist by default and are linked to various email templates, however they do not contain any content and should be updated with information pertaining to the company.

Edit Signature

Name
Admin

HTML
Text

Source

B I U S x₂ x² I_x

Styles

Normal

Font

Size

A- A+

—

My email signature!

body p

Cancel
Update Signature

System Specific

Backups

Backups can be found under [Settings] > [System] > Backup. Blesta supports Amazon S3, and Secure FTP offsite backups in addition to On-Demand. It is strongly recommended that at least one option be configured, if other frequent backups with retention aren't being performed on the server.

On Demand

On demand backups have two options.

1. Force Offsite Backup will run all configured backups immediately, including both Secure FTP and Amazon S3, if they are configured.
2. Download Backup will immediately create a backup for download. This process can take some time depending on the size of the database.

On demand backups are especially useful for backing up the database prior to an upgrade.

On Demand

Here you can download a backup of your Blesta database to your computer or automatically upload a backup to your configured SFTP and/or Amazon S3 server.

Force Offsite Backup

Download Backup

Amazon S3

[Amazon S3](#) is a cloud based file storage service by Amazon. Database backups can be automatically sent to Amazon S3 by entering the access key, secret key, and bucket name provided by Amazon.

Amazon S3

Test These Settings

Region
US Standard

Access Key

Secret Key

Bucket

Backup Every
2 Hours

Update Settings

SFTP

SFTP, or Secure FTP is a secure way to backup files off-site to any SFTP server. SFTP typically tunnels over SSH on port 22 and requires a hostname, port, username, password, and a path to store the backups.

Secure FTP

Test These Settings

Hostname
mybackupserver.com

Port
22

Username
backup

Password
●●●●●●●●

Path
/path/to/my/backups

Backup Every
Hour

Update Settings