Actions

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Locating Actions

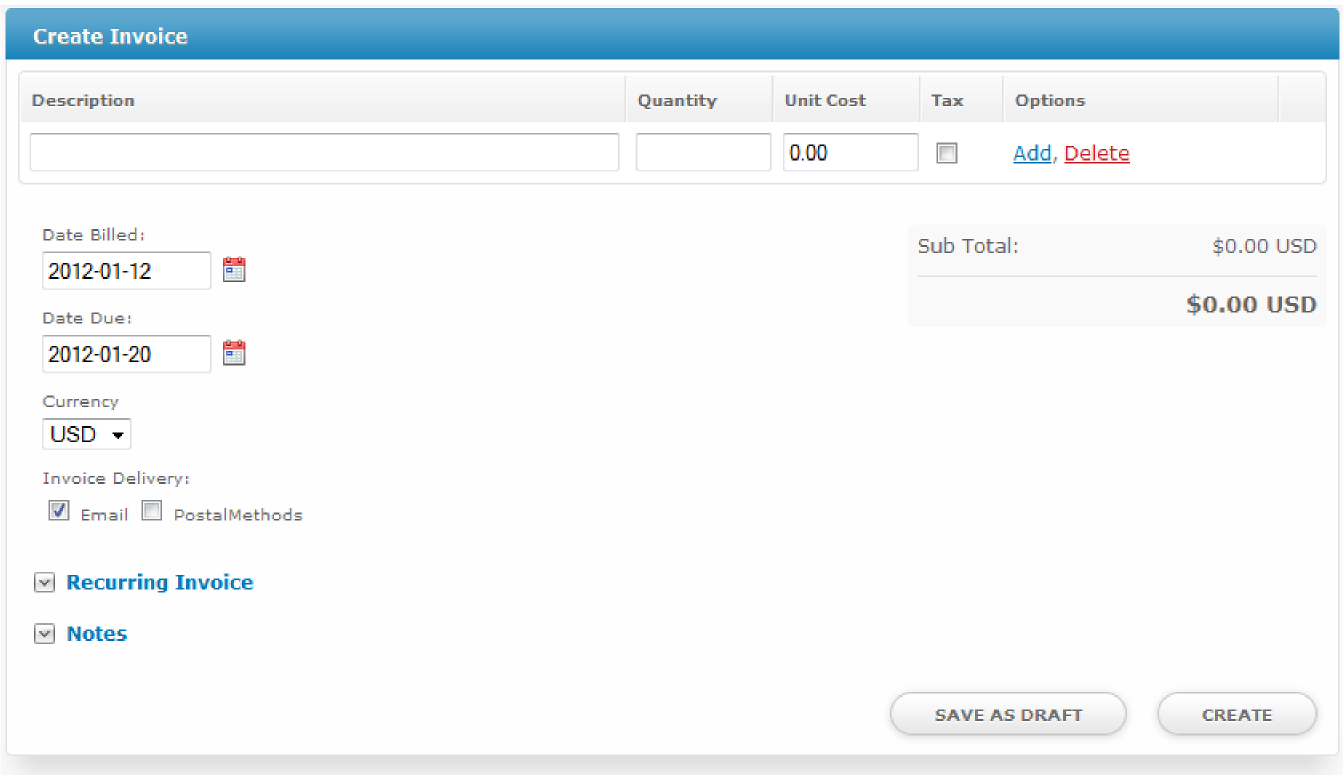
To access account actions, a Client must be identified and their Profile page accessed. Please see Finding Clients for more information on accessing a client profile page.

Available Actions

Available Actions are listed on the left hand column of a client profile page, below the client detail box. All actions performed here affect this client specifically. This section by default shows common actions used by the authenticated staff member and hides those that are not commonly used. Selecting "Show All Actions" will list all available actions.

Create Invoice

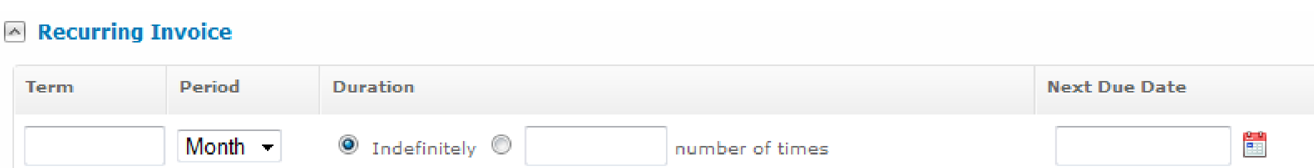
Blesta creates invoices automatically for recurring services, but invoices and recurring invoices can be created manually by selecting "Create Invoice" under Actions. The following form will be shown:



Billing for hourly work?

Quantities support decimal and fractional values. For example, a 55 minute task could be invoiced with a quantity of 55/60, and the unit cost would be the hourly rate.

Recurring invoices can be created by expanding this option.

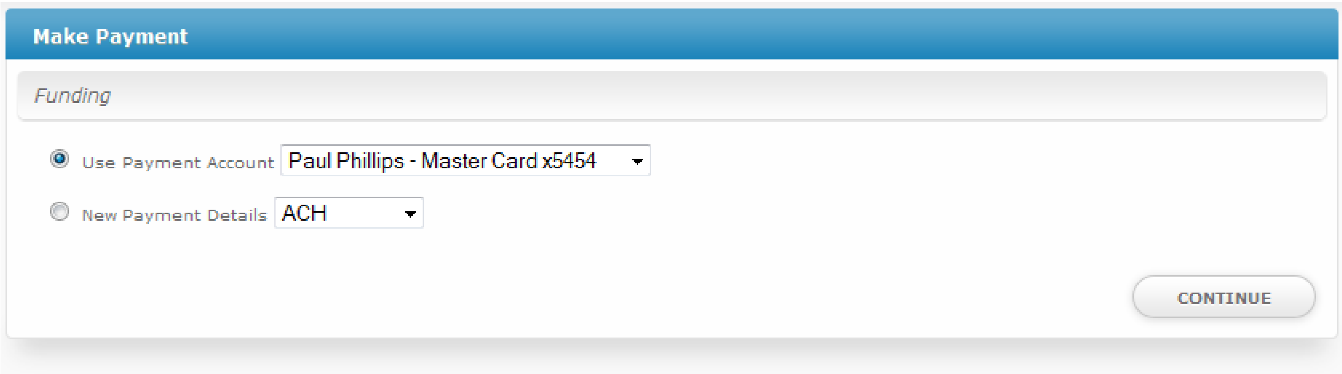


Make Payment

Payment can be made in one of two ways, either by using an existing payment account which contains credit card or ACH details, or by entering new payment details.

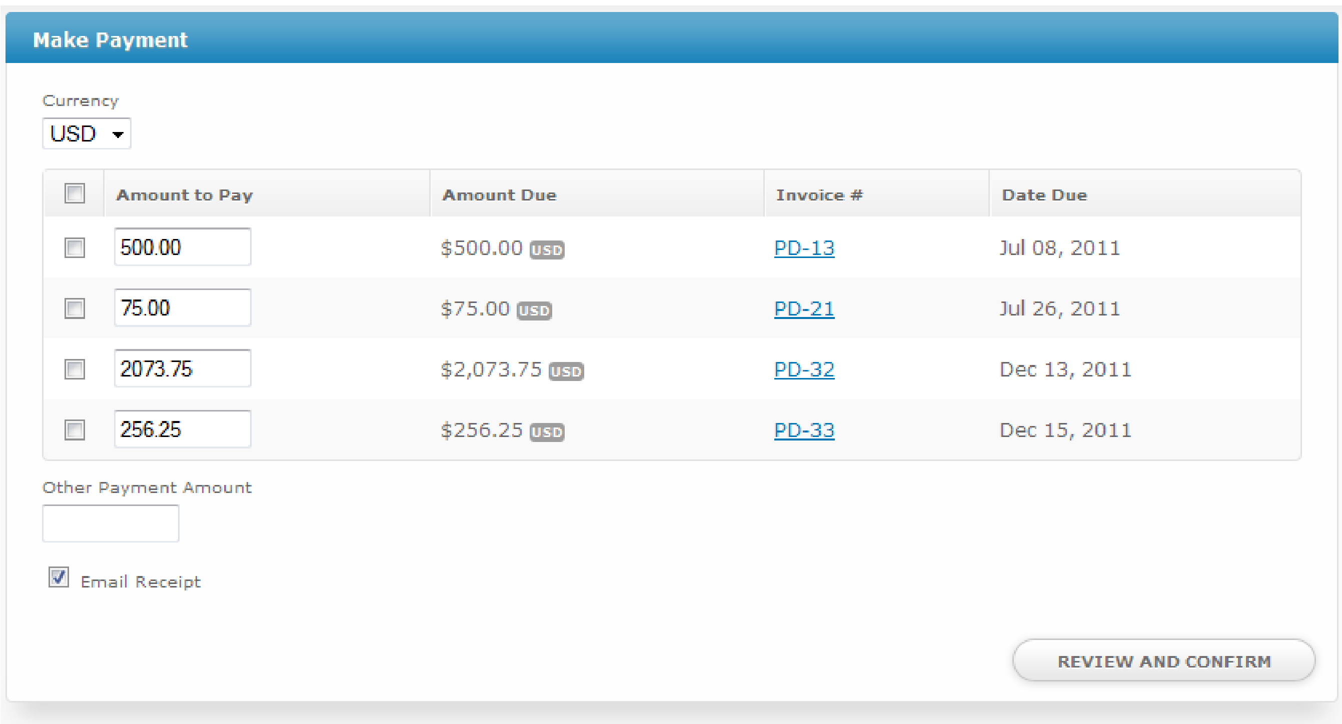
Step 1

Select how the payment will be funded, either by using an existing payment account or entering new payment details. If "New Payment Details" is selected, a form will be displayed prompting for contact and billing information for this payment, and the details can be optionally saved as a payment account before continuing to step 2.



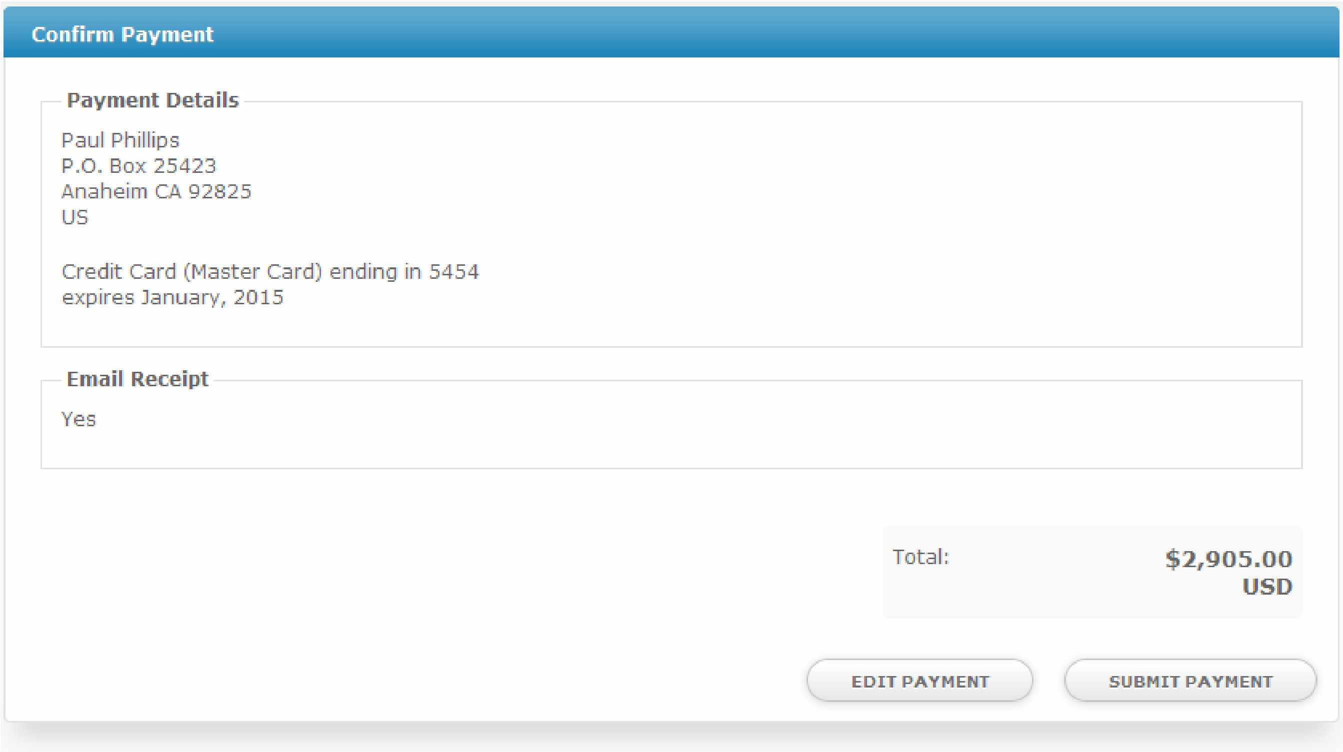
Step 2

All open invoices are displayed for the selected currency and can be selected for payment. The amount for each can optionally be adjusted. An additional "Other Payment Amount" can be entered and would be applied to the account as a credit. By default an email receipt will be sent to the client for this charge.



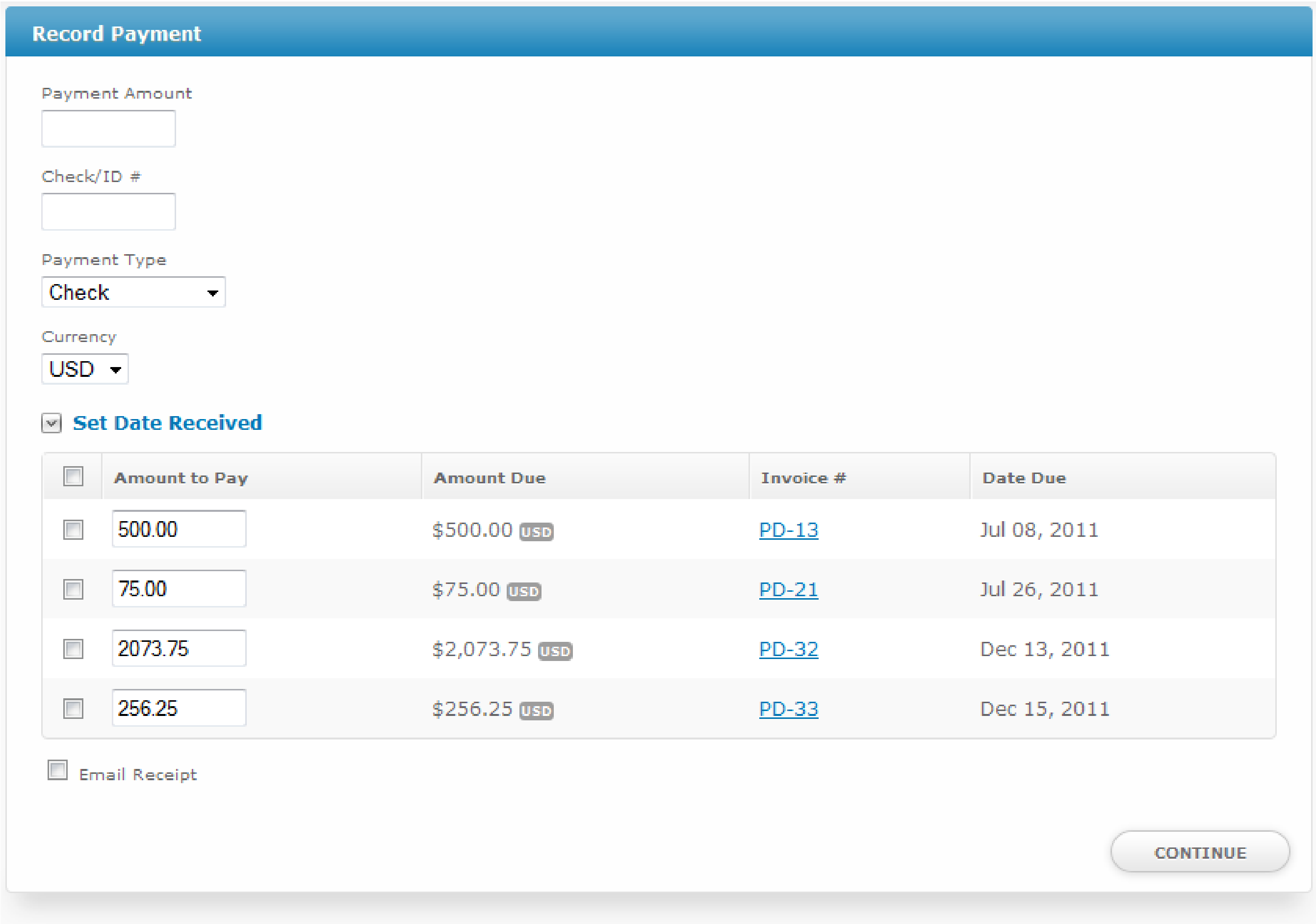
Step 3

Payment details as well as the payment total are displayed and the payment can be edited or submitted. Once submitted a charge is attempted and the payment is completed.



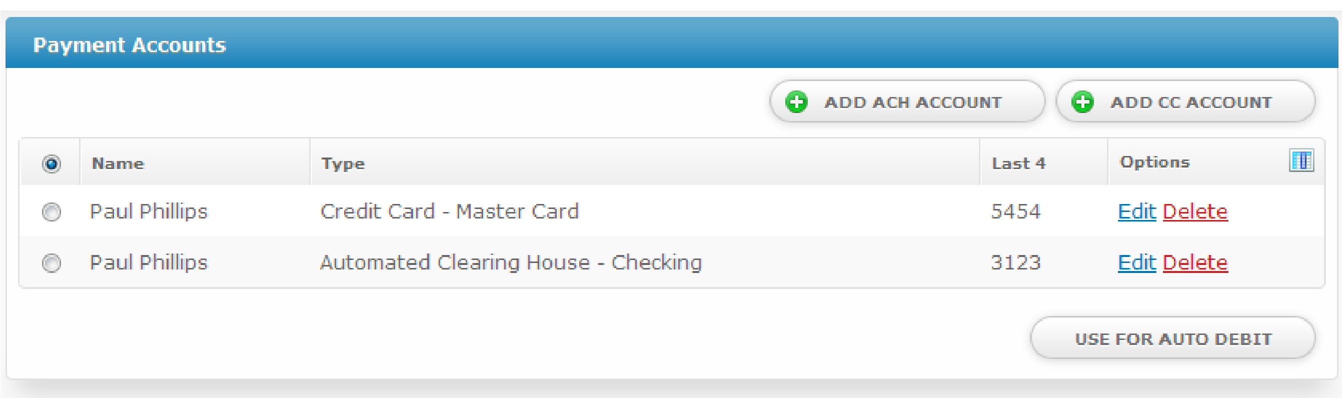
Record Payment

Recording payment is useful for offline payments such as checks or money orders. The process is similar to, but simpler than "Make Payment" in that payment can be applied to specific invoices at specified amounts but there are fewer steps.

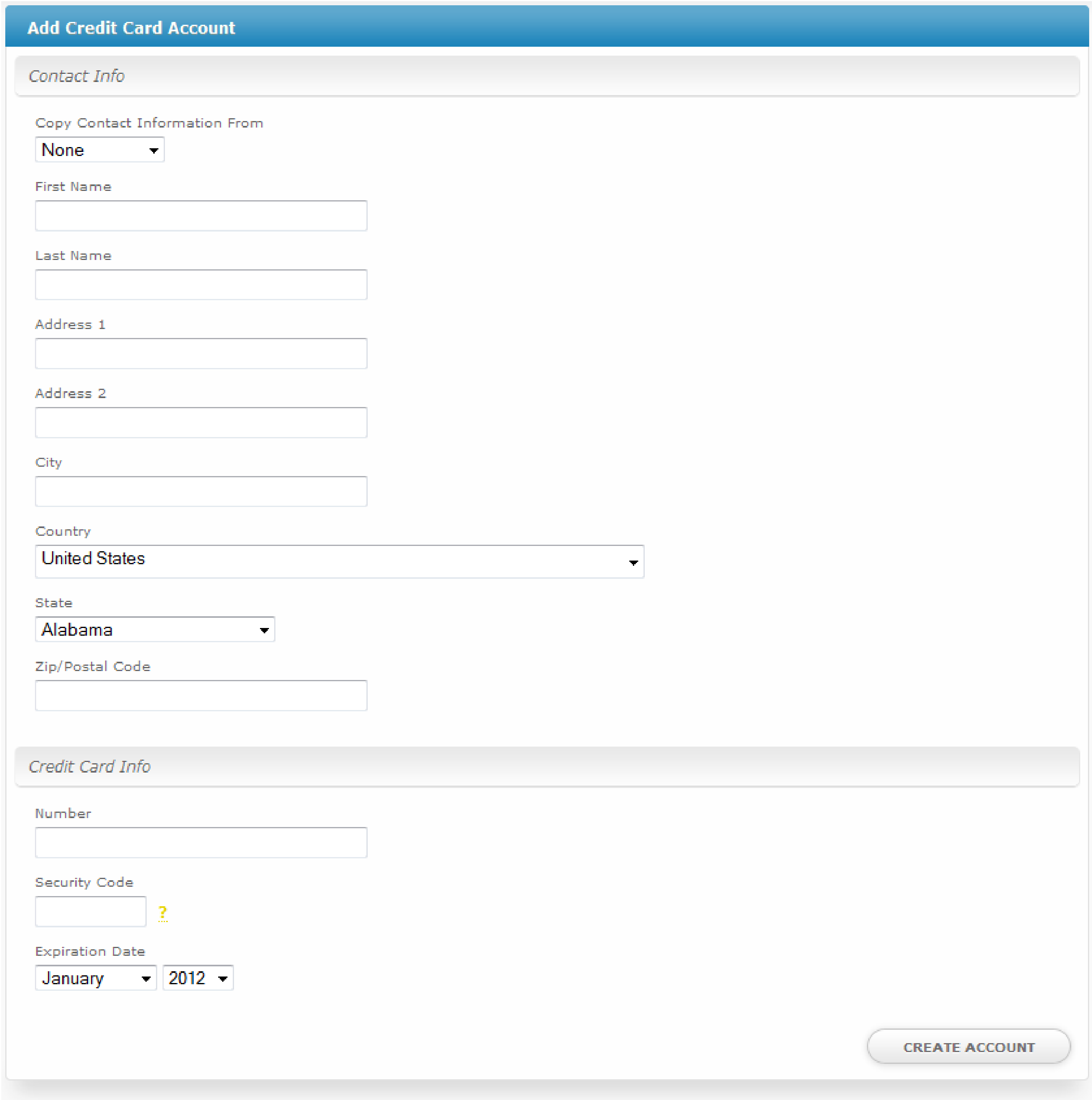


Payment Accounts

Payment Accounts consist of credit card or ACH details, stored either within Blesta or with the gateway and are used for recurring payments or for keeping payment information on hand. Selecting "Payment Accounts" from the Actions box will list all active payment accounts and allow one to be selected for auto-debit. New credit card and ACH payment accounts can be added here and existing payment accounts can be changed or deleted.



Selecting the Add CC Account button will display the following. When creating payment accounts contact details are necessary and can optionally be copied directly from an existing contact. The credit card or ACH details are stored either encrypted within Blesta or remotely with the gateway depending on the gateway and the options specified with the gateway.

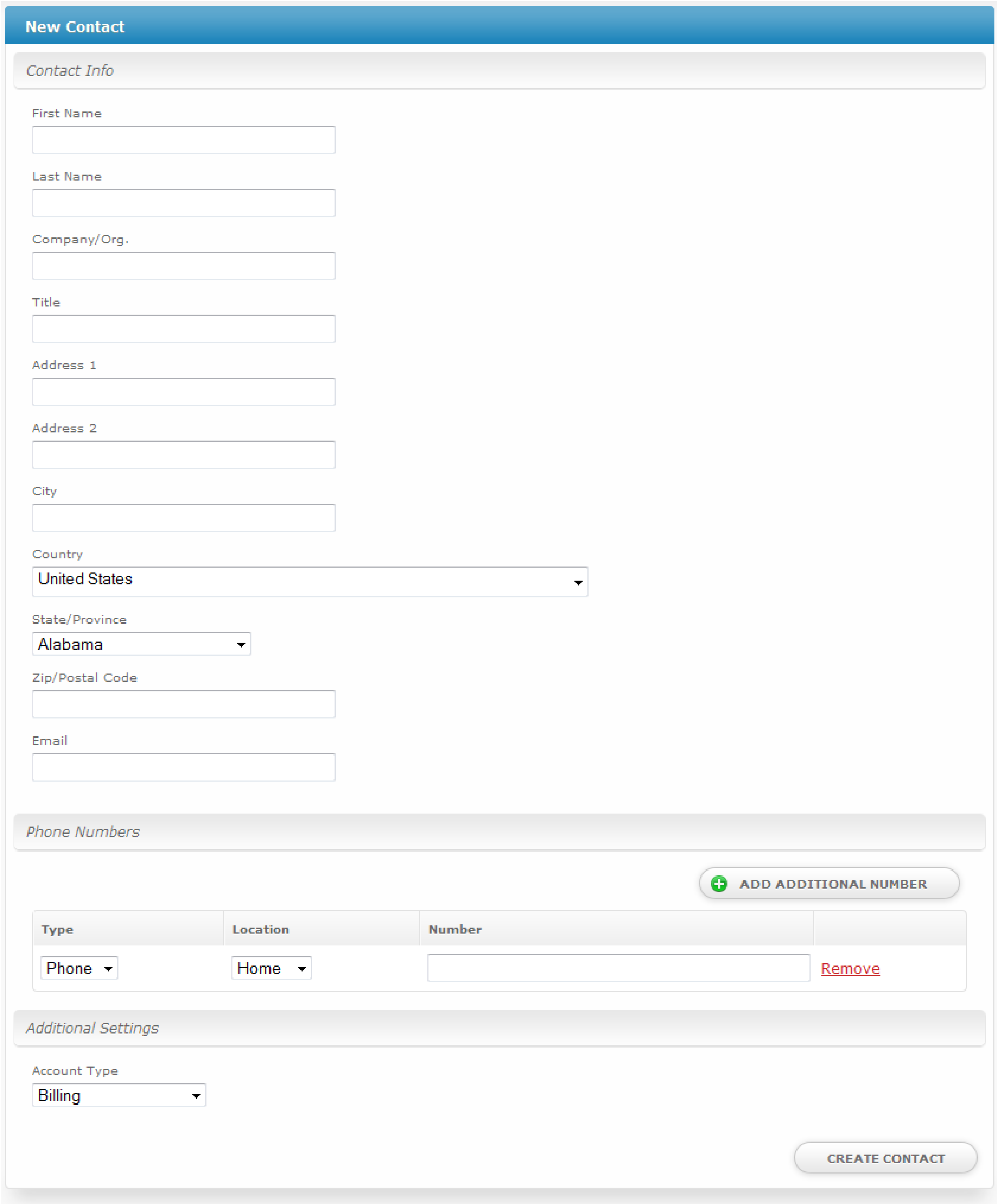


Add Service

Add Contact

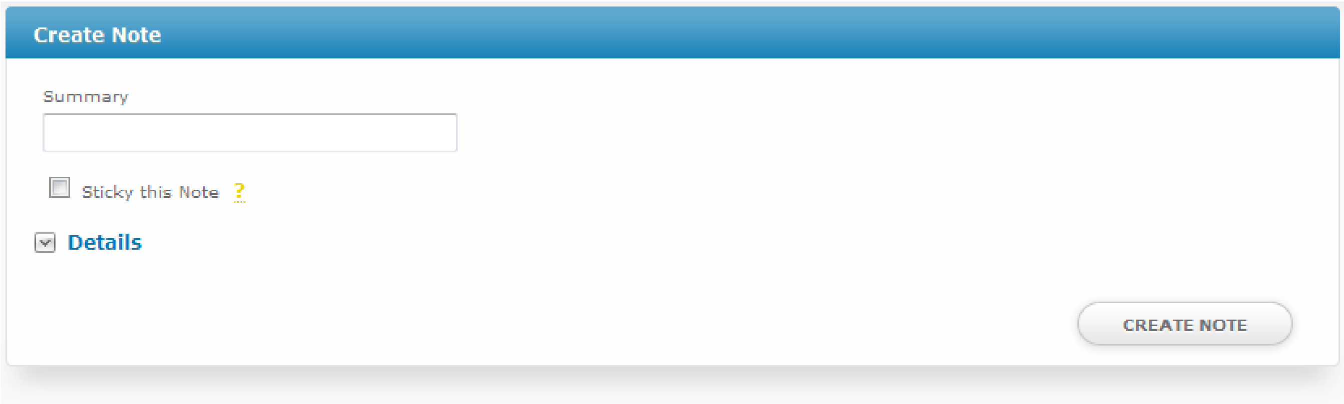
Contacts can be very useful, and contacts of the type Billing receive invoices and billing notifications. Additional contact types can be created for various other reasons. A technical contact for example might grant that person the ability to call in to receive support or make changes of a technical nature to the account.

An unlimited number of phone numbers can be stored for a contact. Additional numbers can be added by selecting the "Add Additional Number" button.



Add Note

To add a note, under Actions click "Add Note". The following form will be displayed:



Enter a Summary, choose whether the note should be a sticky note, and optionally enter additional details. If a note is a sticky, it will appear at the top of the clients profile page like this:

To remove a sticky note from the clients profile page, either edit the note and uncheck the option, or mouse-over the summary in the yellow sticky and an "Unstick" option will be presented. If there are no sticky notes the sticky note section will not appear on the client profile.

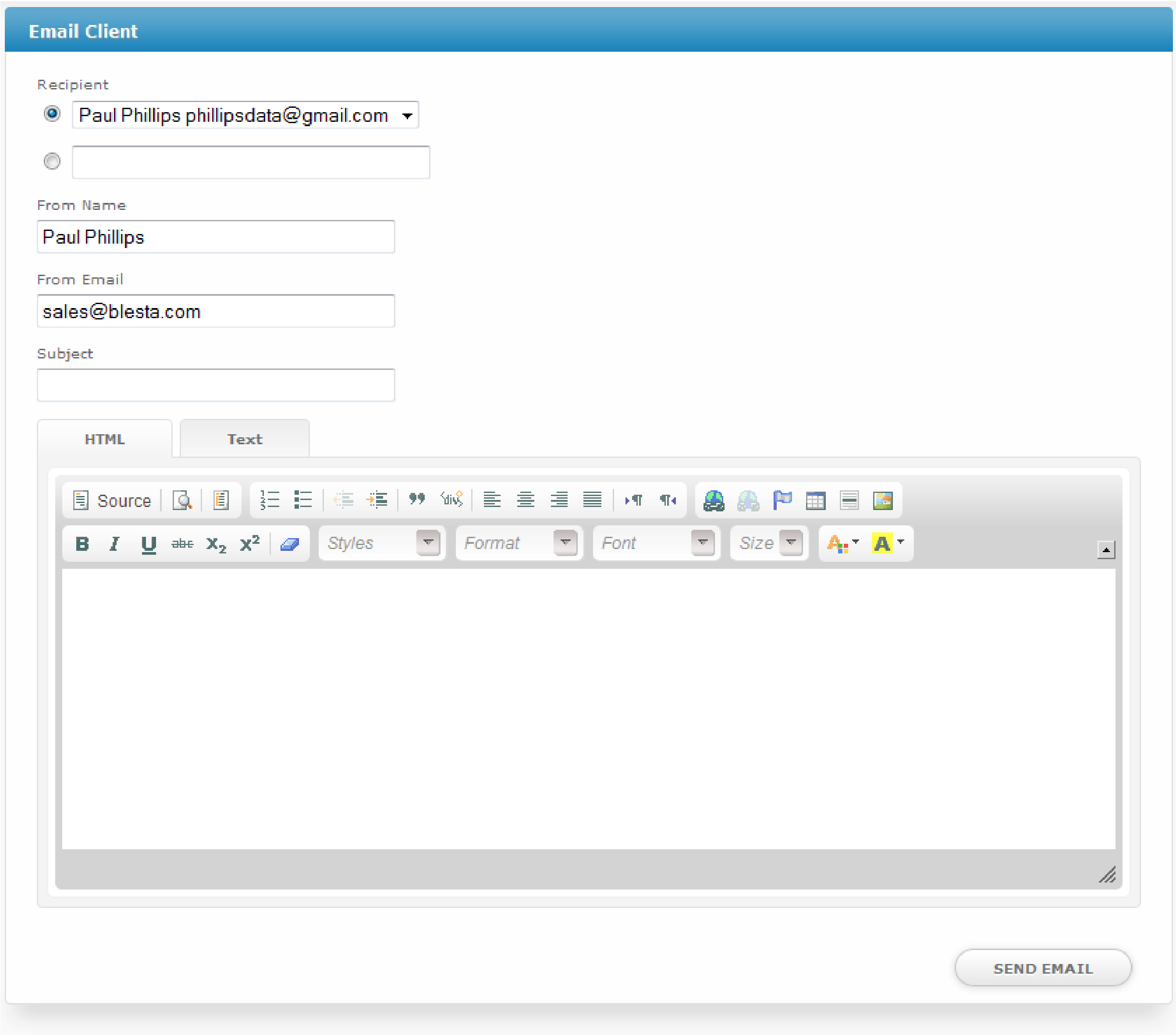
Set Packages

Open Ticket

Email Client

A client can be emailed directly from their profile by staff members. This is useful for keeping a track of email sent from Blesta as they will appear in the email log or for convenience when away from a computer with an email client.

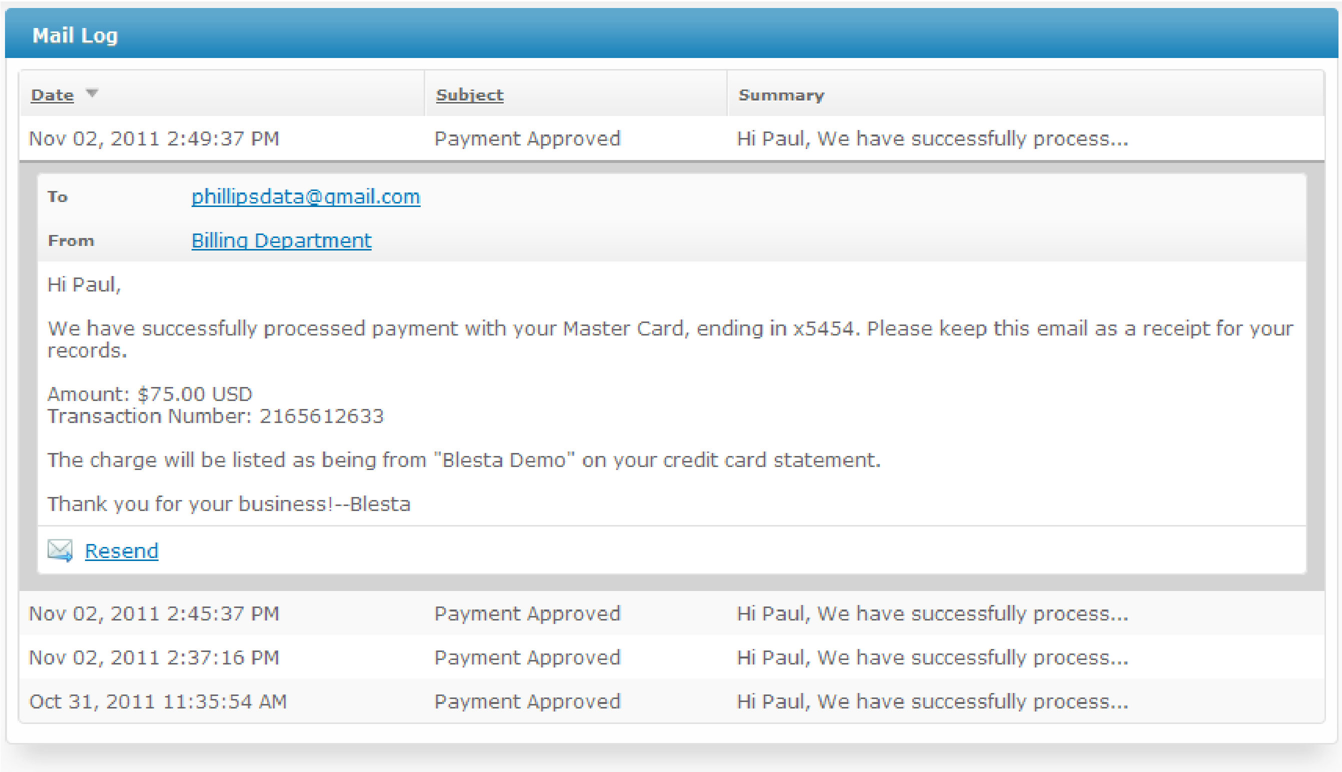
The email interface fully supports HTML messages and can be composed through the WYSIWYG editor.



Login as Client

View Mail Log

A mail log exists for all clients any email has been sent to through Blesta, including automatic emails and manual emails sent from "Email Client". The contents of each message can be expanded by clicking on the log row, and the message can optionally be resent to the original recipient or another recipient.



Merge Client

Delete Client