

# Actions

Table of Contents

- 1 Locating Actions
- 2 Available Actions
  - 2.1 Create Invoice
  - 2.2 Make Payment
  - 2.3 Record Payment
  - 2.4 Payment Accounts
  - 2.5 Add Service
  - 2.6 Add Contact
  - 2.7 Add Note
  - 2.8 Set Packages
  - 2.9 Open Ticket
  - 2.10 Email Client
  - 2.11 Login as Client
  - 2.12 View Mail Log
  - 2.13 Merge Client
  - 2.14 Delete Client



## 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:

Create Invoice

Description	Quantity	Unit Cost	Tax	Options
<input type="text"/>	<input type="text"/>	0.00	<input type="checkbox"/>	<a href="#">Add</a> , <a href="#">Delete</a>

Date Billed:

Date Due:

Currency

Invoice Delivery:  
☒ Email ☐ PostalMethods

☒ **Recurring Invoice**

☒ **Notes**

Sub Total: \$0.00 USD

\$0.00 USD

SAVE AS DRAFT

CREATE



### 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.

### **Recurring Invoice**

Term	Period	Duration	Next Due Date
<input type="text"/>	<input type="text" value="Month"/>	<input checked="" type="radio"/> Indefinitely <input type="radio"/> <input type="text"/> number of times	<input type="text"/>

## 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.

**Make Payment**

Funding

☒ Use Payment Account Paul Phillips - Master Card x5454 ▼

☐ New Payment Details ACH ▼

CONTINUE

### 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.

**Make Payment**

Currency  
USD ▼

<input type="checkbox"/>	Amount to Pay	Amount Due	Invoice #	Date Due
<input type="checkbox"/>	<input type="text" value="500.00"/>	\$500.00 USD	<a href="#">PD-13</a>	Jul 08, 2011
<input type="checkbox"/>	<input type="text" value="75.00"/>	\$75.00 USD	<a href="#">PD-21</a>	Jul 26, 2011
<input type="checkbox"/>	<input type="text" value="2073.75"/>	\$2,073.75 USD	<a href="#">PD-32</a>	Dec 13, 2011
<input type="checkbox"/>	<input type="text" value="256.25"/>	\$256.25 USD	<a href="#">PD-33</a>	Dec 15, 2011

Other Payment Amount

☒ Email Receipt

REVIEW AND CONFIRM

### 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.

## Confirm Payment

### Payment Details

Paul Phillips  
P.O. Box 25423  
Anaheim CA 92825  
US

Credit Card (Master Card) ending in 5454  
expires January, 2015

### Email Receipt

Yes

Total: **\$2,905.00**  
USD

EDIT PAYMENT

SUBMIT PAYMENT

## 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.

Record Payment

Payment Amount

Check/ID #

Payment Type

Check

Currency

USD

☒ Set Date Received

<input type="checkbox"/>	Amount to Pay	Amount Due	Invoice #	Date Due
<input type="checkbox"/>	500.00	\$500.00 USD	<a href="#">PD-13</a>	Jul 08, 2011
<input type="checkbox"/>	75.00	\$75.00 USD	<a href="#">PD-21</a>	Jul 26, 2011
<input type="checkbox"/>	2073.75	\$2,073.75 USD	<a href="#">PD-32</a>	Dec 13, 2011
<input type="checkbox"/>	256.25	\$256.25 USD	<a href="#">PD-33</a>	Dec 15, 2011

☐ Email Receipt

CONTINUE

## 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.

Payment Accounts

+ ADD ACH ACCOUNT

+ ADD CC ACCOUNT

<input checked="" type="radio"/>	Name	Type	Last 4	Options	
<input type="radio"/>	Paul Phillips	Credit Card - Master Card	5454	<a href="#">Edit</a> <a href="#">Delete</a>	
<input type="radio"/>	Paul Phillips	Automated Clearing House - Checking	3123	<a href="#">Edit</a> <a href="#">Delete</a>	

USE FOR AUTO DEBIT

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 Credit Card Account

### Contact Info

Copy Contact Information From

None ▼

First Name

Last Name

Address 1

Address 2

City

Country

United States ▼

State

Alabama ▼

Zip/Postal Code

### Credit Card Info

Number

Security Code

 ?

Expiration Date

January ▼ 2012 ▼

CREATE ACCOUNT

## 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.



New Contact

Contact Info

First Name

Last Name

Company/Org.

Title

Address 1

Address 2

City

Country

United States

State/Province

Alabama

Zip/Postal Code

Email

Phone Numbers

+

ADD ADDITIONAL NUMBER

Type	Location	Number	
Phone	Home		<a href="#">Remove</a>

Additional Settings

Account Type

Billing

CREATE CONTACT

## Add Note

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

Create Note

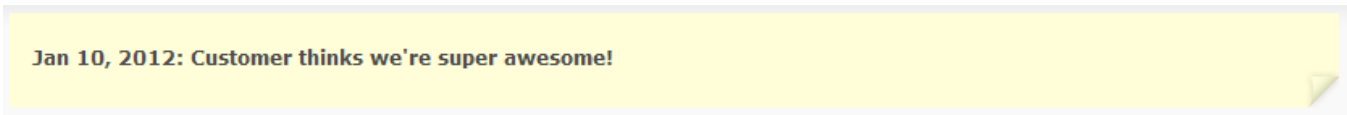
Summary

☐ Sticky this Note ?

☒ Details

CREATE NOTE

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.

Email Client

Recipient

☒ Paul Phillips phillipsdata@gmail.com ▾

☐



From Name


























From Email


Subject

HTMLText

Source





Mail Log		
Date ▼	Subject	Summary
Nov 02, 2011 2:49:37 PM	Payment Approved	Hi Paul, We have successfully process...
<div> <div> <div>To</div> <div><a href="mailto:phillipsdata@gmail.com">phillipsdata@gmail.com</a></div> </div> <div> <div>From</div> <div><a href="#">Billing Department</a></div> </div> </div> <div> <p>Hi Paul,</p> <p>We have successfully processed payment with your Master Card, ending in x5454. Please keep this email as a receipt for your records.</p> <p>Amount: \$75.00 USD Transaction Number: 2165612633</p> <p>The charge will be listed as being from "Blesta Demo" on your credit card statement.</p> <p>Thank you for your business!--Blesta</p> <div>  <a href="#">Resend</a> </div> </div>		
Nov 02, 2011 2:45:37 PM	Payment Approved	Hi Paul, We have successfully process...
Nov 02, 2011 2:37:16 PM	Payment Approved	Hi Paul, We have successfully process...
Oct 31, 2011 11:35:54 AM	Payment Approved	Hi Paul, We have successfully process...

**Merge Client**

**Delete Client**