

Creating Invoices

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About Invoices

Invoices in Blesta are created a number of different ways:

1. Automatically, as active services come up for renewal.
2. Automatically, as recurring invoices come up again.
3. Manually, by creating an invoice in the client's profile page.

Customizing Invoices

Invoices in Blesta can be customized under Settings > Company > Billing/Payment > Invoice Customization. You can change the following:

- Invoice Format
- Invoice Draft Format
- Invoice Start Value
- Invoice Increment Value
- Invoice Type (Standard/Pro forma)
- Look and Feel (Logo and Background image)
- Paper Size (Letter/A4)
- Invoice Template (Default/Perforated/Quickbooks)
- Invoice File type
- Font
- Terms
- Display on Invoice (Logo, Company Name/Address, PAID Watermark, Payments/Creditis, Date Due - Draft, Date Due - Pro Forma, Date Due - Standard)

Download a sample Background image



(png)



(psd)

Creating Manual/One-Time Invoices

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

Create Invoice

Description	Quantity	Unit Cost	Tax	Options
		0.00	☐	Add , Delete

Date Billed:

Date Due:

Currency

Invoice Delivery:
☒ Email

Auto Debit:
☒ Allow auto-debiting for this invoice

Sub Total: \$0.00

\$0.00

Recurring Invoice

Notes

Save as Draft

Create

Some notes about creating invoices:

- Multiple line items may be added by clicking the "Add" link next to a line item. A new line item will appear below the one selected.
- Line items may be re-arranged by drag-n-drop.
- Setting the "Date Billed" to a future date, will cause the invoice not to be displayed in the client area until that date, nor will it be delivered via the selected delivery methods.
- When creating a new invoice, your work is saved periodically as a draft. In the event of a browser crash, the invoice can be recovered under drafts.
- Depending on company settings, invoices may be charged automatically. You can disable this for a particular invoice by unchecking the 'Allow auto-debiting for this invoice' box.



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. Up to 4 decimal places can be used in pricing as well, which is later rounded.

Recurring invoices can be created by expanding the **Recurring Invoices** option, as shown below.

Recurring Invoice

Term	Period	Duration	Next Renew Date
	Month	☒ Indefinitely ☐ number of times	

Recurring invoices are similar to recurring services, except that no service is required. These work great in situations where a module is not necessary or available to automate suspension or unsuspension of services, or for unique services including retainers for work for example. The **Next Renew Date** controls when the next automatically generated invoice based on this recurring invoice is due. This is helpful when you want to create a single instance invoices today, but have it recur on a separate date (e.g. the 1st of the next month).