Company > Billing & Payment

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Invoice and Charge Options

Option	Description
Invoice Days Before Renewal	The number of days before a service or recurring invoice renews to generate an invoice.
Auto Debit Days Before Due Date	The number of days before an invoice is due to auto debit the clients default payment account (if the client is configured for auto debit).
Suspend Services Days After Due	The number of days to wait after an invoice for a service has been past due before suspending the service.
Auto Debit Attempts	The number of attempts and failures to process a payment account before that payment account is disabled from being automatically debited. ⓘ If a payment account is disabled from being auto debited a note will be created on the client's account stating such.
Cancel Service Changes Days After Due (v3.5.0)	The number of days after a queued service change (e.g. upgrade) has been unpaid at which time it will be canceled and the associated invoice voided
Enable Auto Debit	Enables autodebiting of a client when payment is due
Allow Client to Set Invoice Method	Check to allow the client to choose which method of invoice delivery they prefer (e.g. Paper or Email).
Invoice Suspended Service	Check to continuing invoicing suspended services.
Invoice Services Together (v3.6.0)	Creates a single invoice for services that renew on the same day for a client, or (if false) a separate invoice for each service.
Display the Service Date Range for Configurable Options	Check to include the service date range for each configurable option invoice line item.

Allow Clients to Cancel Services	Check to allow clients to cancel their own services.
Allow Addon Services to be Synchronized with their Parent Services (v4.3.0)	Check to prorate newly-created addon services that match the parent's monthly or yearly terms to the parent's renew date.
Allow Clients to Create Addons for Existing Services	Check to allow clients to order addons for any of their services that support them.
Allow Clients to Change Service Terms	Check to allow clients to change the term of recurring services.
Allow Clients to Change Service Package (v3.3.0)	Check to allow clients to change the package of recurring services.
Allow Prorated Credits to be Issued for Service Downgrades	Check to allow prorated credits for services, or service configurable options, that are downgraded
Automatically Apply Loose Credits	Check to allow Blesta to automatically apply credits to open invoices (oldest invoices first).
Automatically Provision Paid Pending Services	Check to allow Blesta to automatically provision services that are both pending and have an invoice that has been paid.
Void Open Invoices on Service Cancellation	Check to void associated open invoices when a service is cancelled. If the invoice has line items not associated wit the service, those that are will be removed from the invoice.
Void Open Invoices Days After Due	Select the number of days after the invoice is due that it can be automatically voided.
Show the Tax ID Field in the Client Interface	Check to show the Tax ID field in the client interface
Queue Service Changes Until Paid	Check to queue service changes (i.e. upgrades/downgrades) and provision only after they have been paid. Otherwise, they will be provisioned immediately.

Invoice Customization

Invoice Customization

Basic Options

Invoice Format
`{num}` ?

Invoice Draft Format
`DRAFT-{num}` ?

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

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

[Update Settings]

Basic Options

Option	Description	Notes	Since Version
Invoice Format	The invoice number format. Available tags include: • {num} The invoice number (required) • {year} The four-digit year • {month} The two-digit month • {day} The two-digit day	{month} and {day} tags became available in version 3.4 ⓘ Temporal tags (i.e. {year}, {month}, {day}) are replaced by their current values when an invoice is created. This means that the {num} tag will start anew for smallest time period set in the format. For example, using "{num}-{month}" can generate invoice ID codes such as "15-05", indicating the 15th invoice for the month of May. Once an invoice is generated for the next month, the {num} value will start back at 1, e.g. "1-06" indicating the 1st invoice for the month of June. A format of "{num}-{day}{month}" would cause the {num} value to start back at 1 each day.	

ⓘ

Invoice Draft Format	The invoice number format for draft invoices. Available tags include: • {num} The invoice number (required) • {year} The four digit year • {month} The two-digit month • {day} The two-digit day	{month} and {day} tags became available in version 3.4 ⓘ Temporal tags (i.e. {year}, {month}, {day}) are replaced by their current values when an invoice is created. This means that the {num} tag will start anew for smallest time period set in the format. For example, using "{num}-{month}" can generate invoice ID codes such as "15-05", indicating the 15th invoice for the month of May. Once an invoice is generated for the next month, the {num} value will start back at 1, e.g. "1-06" indicating the 1st invoice for the month of June. A format of "{num}-{day}{month}" would cause the {num} value to start back at 1 each day.	
Invoice Start Value	The invoice number start value.	Changing this value after invoices have been generated will start the next invoice number at this start value plus the increment value.	
Invoice Increment Value	The invoice number increment value.		
Invoice Type	The type of invoice that is created by default.	Pro forma invoices change to Standard invoices after they have been paid and closed.	3.3
Pro Forma Invoice Format	The pro forma invoice format. Available tags include: • {num} The invoice number (required) • {year} The four-digit year • {month} The two-digit month • {day} The two-digit day	{month} and {day} tags became available in version 3.4 ⓘ Temporal tags (i.e. {year}, {month}, {day}) are replaced by their current values when an invoice is created. This means that the {num} tag will start anew for smallest time period set in the format. For example, using "{num}-{month}" can generate invoice ID codes such as "15-05", indicating the 15th invoice for the month of May. Once an invoice is generated for the next month, the {num} value will start back at 1, e.g. "1-06" indicating the 1st invoice for the month of June. A format of "{num}-{day}{month}" would cause the {num} value to start back at 1 each day.	3.3
Pro Forma Invoice Start Value	The pro forma invoice number start value.		3.3

Cache

Option	Description	Notes	Since Version
Invoice Cache Method	Whether to save a cached copy of each invoice on disk, and what format to save it in.	Options: None, JSON, JSON + PDF	5.1
Compress PDF Invoices	Compress the cached PDF files to save space on disk. Enabling this option can decrease performance.	This option only appears when the JSON + PDF method is selected	5.1

Look and Feel

Option	Description

⚠

Logo	Upload the logo to appear on the invoice. ⚠️ **Can't upload?** If you're having trouble uploading a logo check that the Uploads Directory under [Settings] > [System] > [General] > [Basic Setup] is configured correctly.
Backgro und	Upload the background to appear on the invoice. ⚠️ **The GD extension may be required** If the background or logo needs to be resized the GD PHP extension may be required.
Paper Size	The paper size (if printing).
Invoice Template	The invoice template to use to render the invoice.
Invoice File Type	The invoice file type. Invoice templates may support various file types.
Font Family	Select the font to be used for PDF invoices for each installed language. ⚠️ Because of the nature of PDFs most fonts must be embedded within the document, and only characters supported by the font may be displayed. This means you may need to select or add a different font to properly display characters for your language. ⓘ To add additional fonts, download additional TCPDF fonts and unpack them to the **/vendors/tcpdf/fonts/** directory of your Blesta installation.
Terms	Enter the payment terms or any other information you wish to appear on the invoice for each installed language.
Display on Invoice	<table><tr><td>**Option**</td><td>**Description**</td><td>**Since Version**</td></tr><tr><td>Logo</td><td>Check to display the logo on the invoice.</td><td></td></tr><tr><td>Company Name/Address</td><td>Check to display the company name and address on the invoice.</td><td></td></tr><tr><td>PAID Watermark</td><td>Check to display a "PAID" watermark on the invoice if the invoice has been paid.</td><td></td></tr><tr><td>Payments/Credits</td><td>Check to display transaction payments that have been applied to the invoice.</td><td>3.4</td></tr></table>

Invoice Delivery

Basic Options

Option	Description		
Invoice Delivery Methods	**Option**	**Description**	
	Email	Check to enable Email delivery.	
	Paper	Check to enable Paper delivery. If selected invoices will be queued for printing, and must be printed by a staff member under [Billing] > [Print Queue].	
	InterFax	Check to enable Fax delivery through InterFax.	
	PostalMethods	Check to enable Paper delivery through PostalMethods.	

InterFax

Option	Description
Username	Your InterFax username.
Password	Your InterFax password.

PostalMethods

Option	Description
API Key	Your PostalMethods API key.
Test Mode	Check to enable test mode (will not actually delivery invoices).
Include a Reply Envelope	Check to include a reply envelope. If checked, all invoices will be delivered in black and white only.

⚠️

Accepted Payment Types

Accepted Payment Types

Only the payment types selected are available for processing through gateways, or may be added as payment accounts, even if an active gateway supports the type. Unchecking a type that is already accepted will cause payments of that type to not be processed.

☑ Credit Card
☑ Automated Clearing House

Remove Client Overrides

☐ Remove accepted payment types currently set on clients ?

Update Settings

Some payment gateways support both Credit Card and ACH payments. These settings allow you to prevent users from submitting payments of a given type regardless of whether or not the gateways supports it. Check only the types you wish to accept.

Option	Description
Credit Card	Check to enable credit card processing.
Automated Clearing House	Check to enable ACH processing.
Remove accepted payment types currently set on clients (v4.4.0)	Check to remove any accepted payment type overrides set on the client if they are disabled on the company

Payment Due Notices

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

Option	Description

Allow Payment Notices to be Sent	This option sets whether clients can be sent any of the available payment notices.
First Notice	The number of days before or after an invoice is due to send the first late notice email.
Second Notice	The number of days before or after an invoice is due to send the second late notice email.
Third Notice	The number of days before or after an invoice is due to send the third late notice email.
Auto-Debit Pending Notice	The number of days before an account is auto debited to send the pending auto debit notice email.

Coupons

Code	Discount	Used	Max	Start Date	End Date	Options
1000000	Multiple	0	1	Nov 18, 2015	Nov 20, 2015	Edit, Delete
10doff	$10.00 USD	7	50	Dec 27, 2017	May 31, 2021	Edit, Delete
10off	10.0000%	20	100	Dec 27, 2017	Oct 15, 2019	Edit, Delete
1234	90.0000%	110	110	Jun 04, 2014	Sep 01, 2016	Edit, Delete
12345	15.0000%	27	30	Jul 31, 2015	Oct 31, 2017	Edit, Delete
20off	20.0000%	0	5	Nov 15, 2017	Nov 30, 2019	Edit, Delete
20per	20.0000%	1	0	Apr 01, 2016	Jun 30, 2019	Edit, Delete
2doff	$2.00 USD	3	0	Jan 03, 2019	Jan 31, 2020	Edit, Delete
30doff	$30.00 USD	2	100	Mar 06, 2015	Mar 07, 2029	Edit, Delete
30off	30.0000%	0	10	Dec 27, 2017	Jan 06, 2019	Edit, Delete
50per	50.0000%	6	10000	Apr 01, 2016	Feb 28, 2019	Edit, Delete
5doff	$5.00 USD	14	0	Apr 01, 2018	Apr 30, 2019	Edit, Delete
abc&	Multiple	214	1000	Jun 05, 2014	Jun 30, 2020	Edit, Delete
ABCD	20.0000%	7	10	May 13, 2015	Oct 31, 2016	Edit, Delete
alllll2	$15.00 USD	0	100	May 25, 2017	May 31, 2017	Edit, Delete
FREE	100.0000%	15	10000	Apr 11, 2016	Apr 30, 2030	Edit, Delete
tJ1xkzyT	$1.00 USD	2	2	Jun 09, 2014	Sep 30, 2015	Edit, Delete

Creating Coupons

As of Blesta version 3.5.3, setting a Quantity of zero (0) will denote the coupon to have *unlimited* uses.

New Coupon

Basic

☑ Enabled

⦿ Apply when service is added only ◯ Apply when service is added or renews

☑ Apply to Configurable Options

☐ Internal Use Only

Coupon Code

[   ] ↻ Generate code

Limitations

Start Date

[   ] 📅

End Date

[   ] 📅

Quantity

[   ] **?**

Term Limitations

This coupon can only be applied to services that are ordered for one of the selected terms/periods. If none are enabled, then the term for the service will be ignored when evaluating coupon limitations.

Enabled	Period	Terms ?
☐	Day	[ ]
☐	Week	[ ]
☐	Month	[ ]
☐	Year	[ ]
☐	One time	N/A

Discount Options

[Add Additional Currency]

Currency	Type	Value	
USD ▾	Amount ▾	0.0000	Remove

Packages

Package Group Filter

[All   ▾]

Assigned Packages

| A guy1 |
| Bronze |
| Interworx Pac |
| Limited Universal Package |
| Multipackage |
| New Test cPanel |

Available Packages

| Test CentOS WebPanel |
| Test CentOS WebPanel 2 |
| Test License Package |
| Test SolusVM Package |
| Test SolusVM Package 1 |
| VPS Packages |

[Edit Coupon]

Term Limitations

This feature was introduced in version 4.2. Term limitations restrict what pricing term a service can be ordered for and still apply this coupon. If the 'Month' period is enabled with a term list of '1,3' then the coupon can only be applied to services ordered with a pricing term of 1 month or 3 months.