

Using Blesta

This section is designed to cover the most common tasks performed in Blesta and is a good starting point after [Installing Blesta](#). For tasks and information not listed here, see [Configuration](#).

Tasks

Important Settings

There are some settings, post-install that you may want to change. These are the most common, and should be reviewed and adjusted as necessary.

Creating Clients

A step by step on adding new clients.

Creating Packages

How to create Packages, also commonly referred to as Products.

Adding Services

Manually creating and adding a new service for a client.

Creating Invoices

Step by step on creating manual invoices.

Creating Quotes

Creating Payment Accounts

Step by step on creating, editing, and deleting Payment Accounts.

Making Payment

How to make and record payment, and void and refund transactions.

Customizing Emails

How to change and customize email templates.

Changing the Theme

Creating and modifying staff and client area themes.

Customizing the Layout

Uploading a custom logo and re-organizing the client cards.

Customizing the Dashboard

Adding and managing widgets, selecting different dashboard layouts and more.

Using the Calendar

Adding and editing calendar events.

Creating Notes

Step by step for creating normal and sticky client notes.

Internationalization and Languages

Removing Branding

If you have an unbranded license, you may wish to remove the "Powered by Blesta" branding line. Here's how to do that.

Viewing Logs

Working with log data.

Creating Configurable Options

How to create Configurable Options. Configurable Options request additional information from clients when ordering packages.

Configurable Option Logic

Generating Reports

How to generate reports, and create custom reports.

Previewing Themes & Templates

It's possible to preview client area themes and templates without switching to the theme or template.