# **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.