

SETUP GUIDE

*YOUR STEP-BY-STEP GUIDE TO
HELP SCOUT FOR BLESTA*



Did you purchase full service installation?

You can stop right here.

5 Star Plugins' IT professionals will
handle everything end-to-end.

Close this Setup Guide and open
our **Full Service Guide**.



WELCOME

Thank you for choosing Help Scout For Blesta.
You're on your way to building better customer relationships with account visibility right inside your Help Scout mailbox.

Setup involves installing the plugin to Blesta and configuring Help Scout using the custom app feature.



GET PREPARED

- Plugin zip file
- Access to upload files to your server (such as FTP)
- Admin Login for Blesta
- Admin Login for Help Scout





PART I: UPLOAD SERVER FILE

1. **Upload** or FTP the plugin zip file to your server.
2. **Unzip** the file to your **Blesta plugins folder**.

TIP

Wait, this is getting technical...

Ask your IT person to do this part, then you do the rest. There is no coding required to use Help Scout For Blesta.

This is the most technical step.





PART II: **BLESTA** INSTALLATION

1. Login to Blesta, go to settings>plugins and click “**install**”.
2. Go to the installed plugins list, locate the plugin, and click “**enable**”.
3. Then click “**manage**” to view our plugin page.
4. **Copy** the secret key and and callback URL to use later.





PART III: **HELP SCOUT** CONFIGURATION

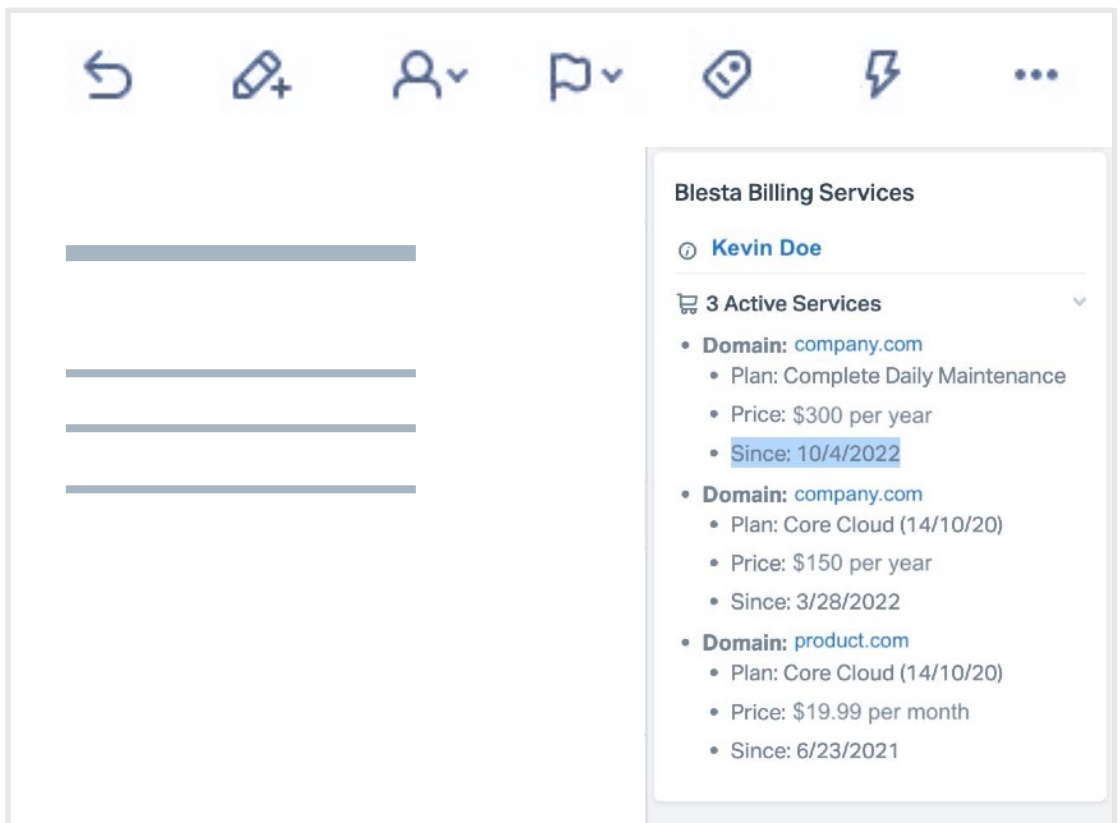
1. Login to Help Scout, go to “**manage apps**”.
2. Click “**build a custom app**”.
3. Click “**create app**” button.
4. Enter the **app name**. It will show up as the title in your mailbox to everyone. For example we use, “*Blesta Billing Services*”.
5. Select “**dynamic content type**” from the drop down.
6. **Paste** in the **callback URL** from the Blesta.
7. **Paste** in the **secret key** from the Blesta.
8. **Choose mailboxes** to display customer data.
9. Click “**save**” to create your custom app.





NOW, TEST IT!

Visit the **Help Scout** mailbox, click on a conversation **from a customer**, and Blesta customer data will display in the right sidebar.



Help Scout



for blesta

Need help?

Email Tech Support

(click top right of Knowledge Base menu)

[Visit Knowledge Base](#)

Did you know you can add on Full Service Installation post purchase? [Learn more](#)