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Client Area

PUQ Account Statement module WHMCS Order now — Download — Community This chapter details the features and actions available to clients in the WHMCS client area for generating and viewing account statements.

Client Area Overview

PUQ Account Statement module **WHMCS**

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This page describes the client area interface and actions available to active service clients.

Accessing the Client Area

Clients can access the module control panel via:

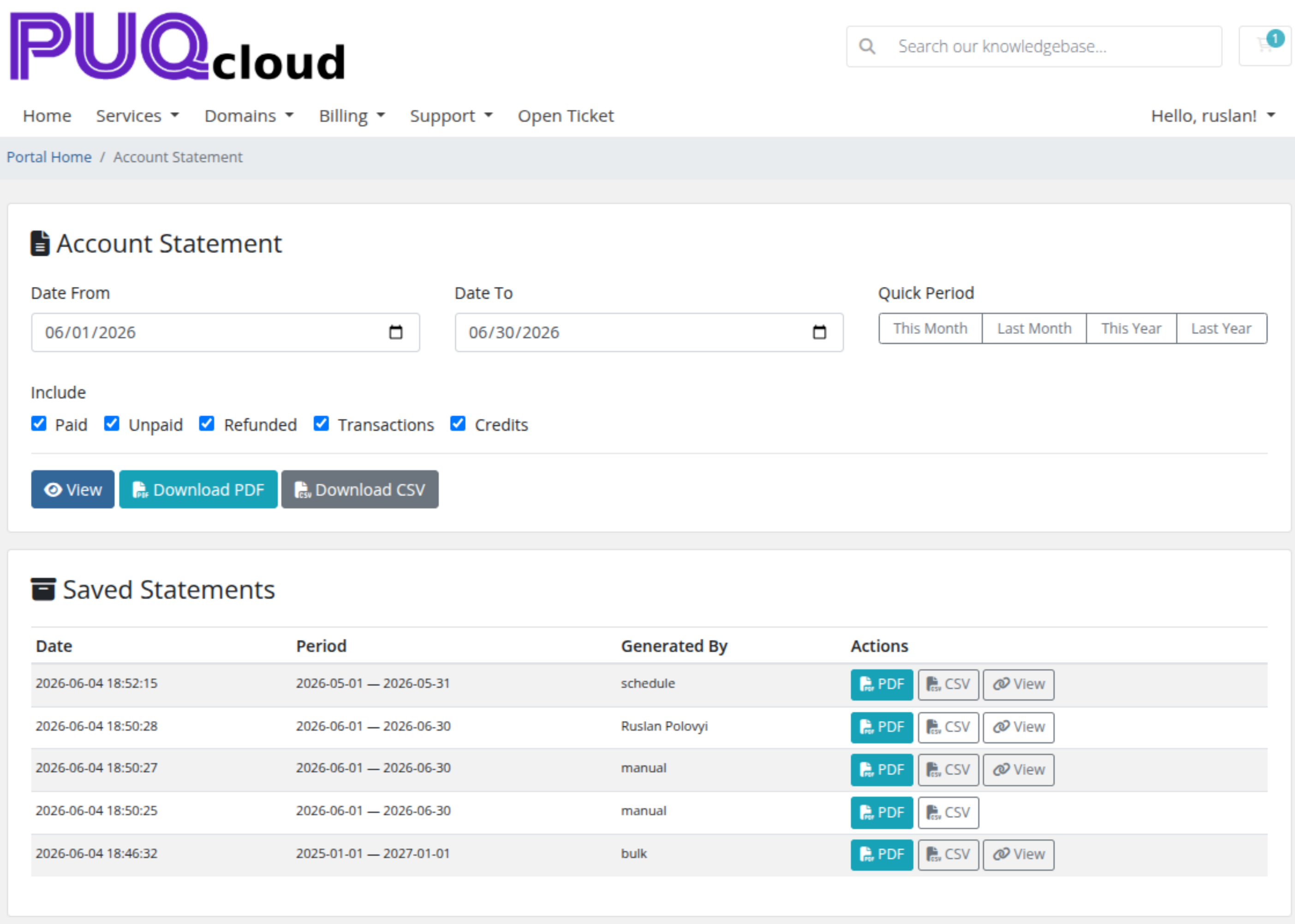
1. Logging into the client area dashboard.
2. Navigating to **Billing > Account Statement**.

Client Actions

Within the control area, clients can:

- **View Statements**: See a list of their previously generated statements.
- **Generate Statement**: Generate a new statement for a specific date range.
- **Download PDF/CSV**: Export the statements.

Screenshot



11-client-area.png

Client Area

PUQ Account Statement module **WHMCS**

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This page describes the client-facing Account Statement functionality available in the WHMCS client area.

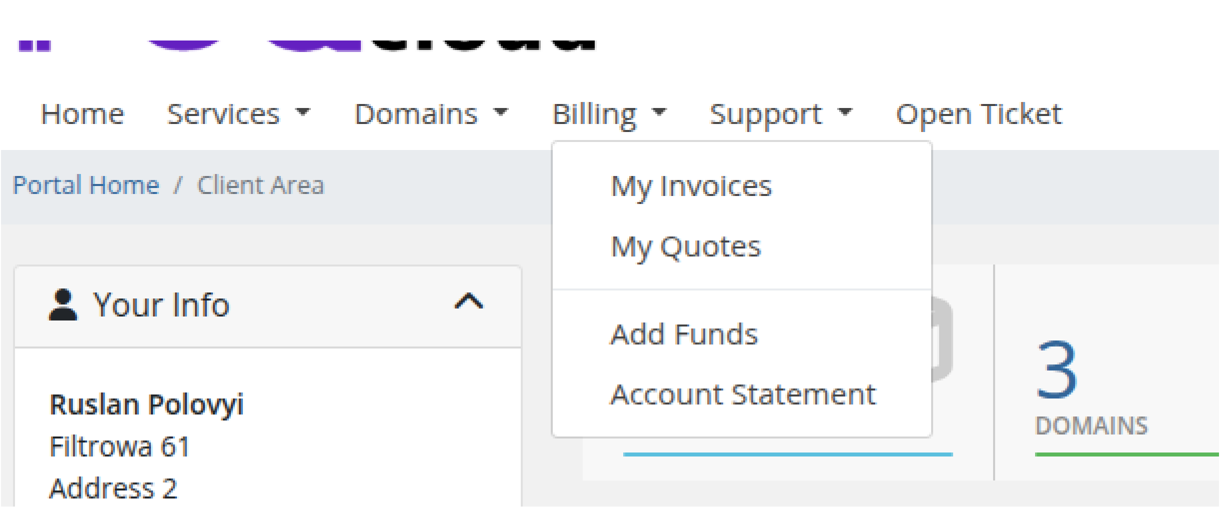
Accessing the Client Area Page

Clients can access their Account Statement page in two ways:

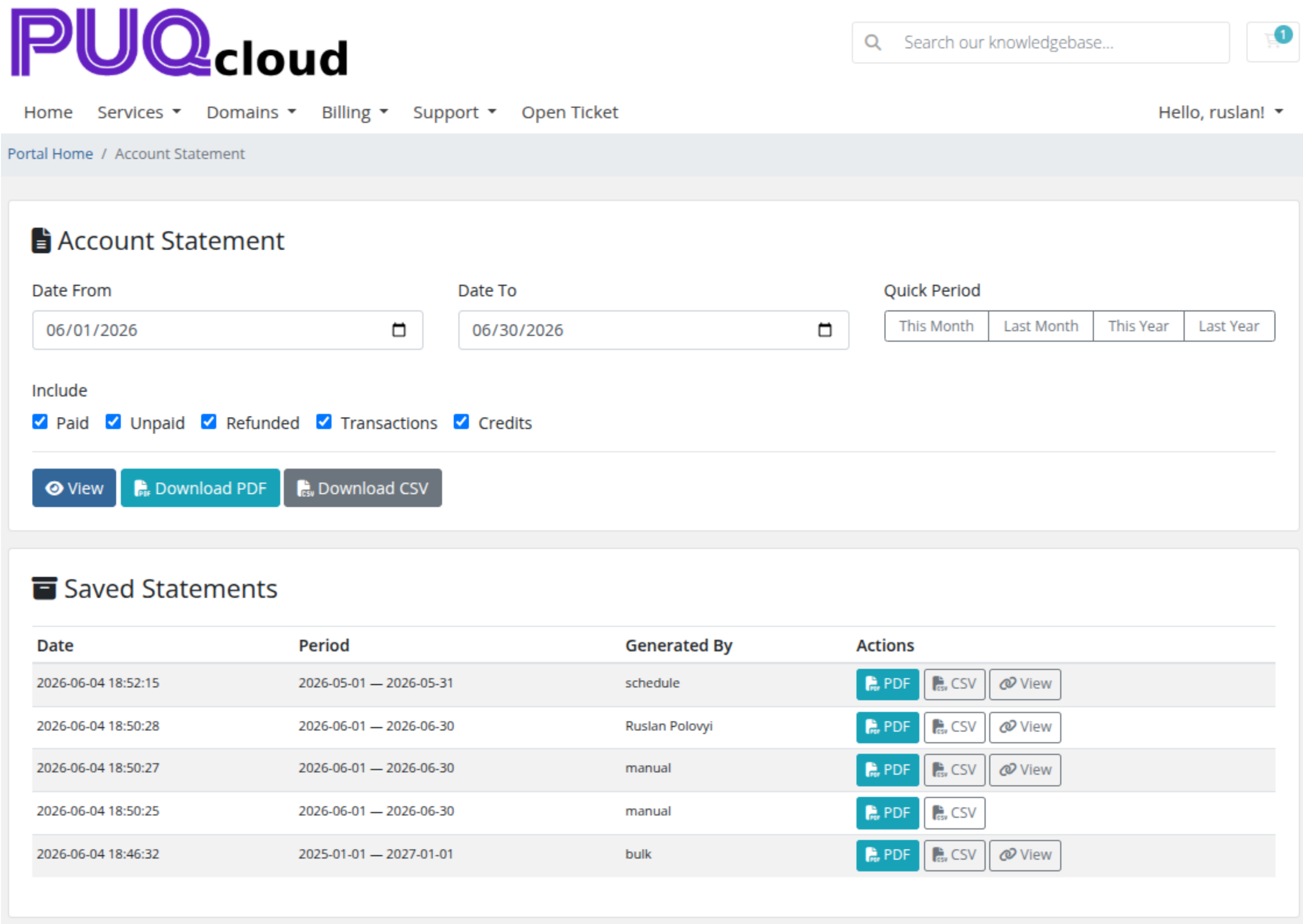
1. **Direct URL** — navigate to `https://your-whmcs.com/index.php?m=puq_account_statement`
2. **Billing Menu** — if "Add to Billing Menu" is enabled in Settings, a link appears in the client area billing navigation

> **Note:** The client area page is only available when "Enable Client Area" is checked in the module Settings.

When "Add to Billing Menu" is enabled, clients reach the page from **Billing** > **Account Statement** in the client area navigation:



22-client-billing-menu.png



11-client-area.png

Generate Statement

The top section allows clients to generate their own account statements:

Date Range

- **Date From / Date To** — manual date pickers
- **Quick Period** buttons — one-click presets: This Month, Last Month, This Year, Last Year

Include Options

Checkboxes to select what financial data to include:

- Paid, Unpaid, Refunded, Transactions, Credits

Action Buttons

Button	Description	Visibility
View	Generate and display the statement preview inline	Always visible
Download PDF	Download the statement as a PDF file	Only if "Client Can Download PDF" is enabled in Settings
Download CSV	Download the statement data as a CSV file	Only if "Client Can Download CSV" is enabled in Settings

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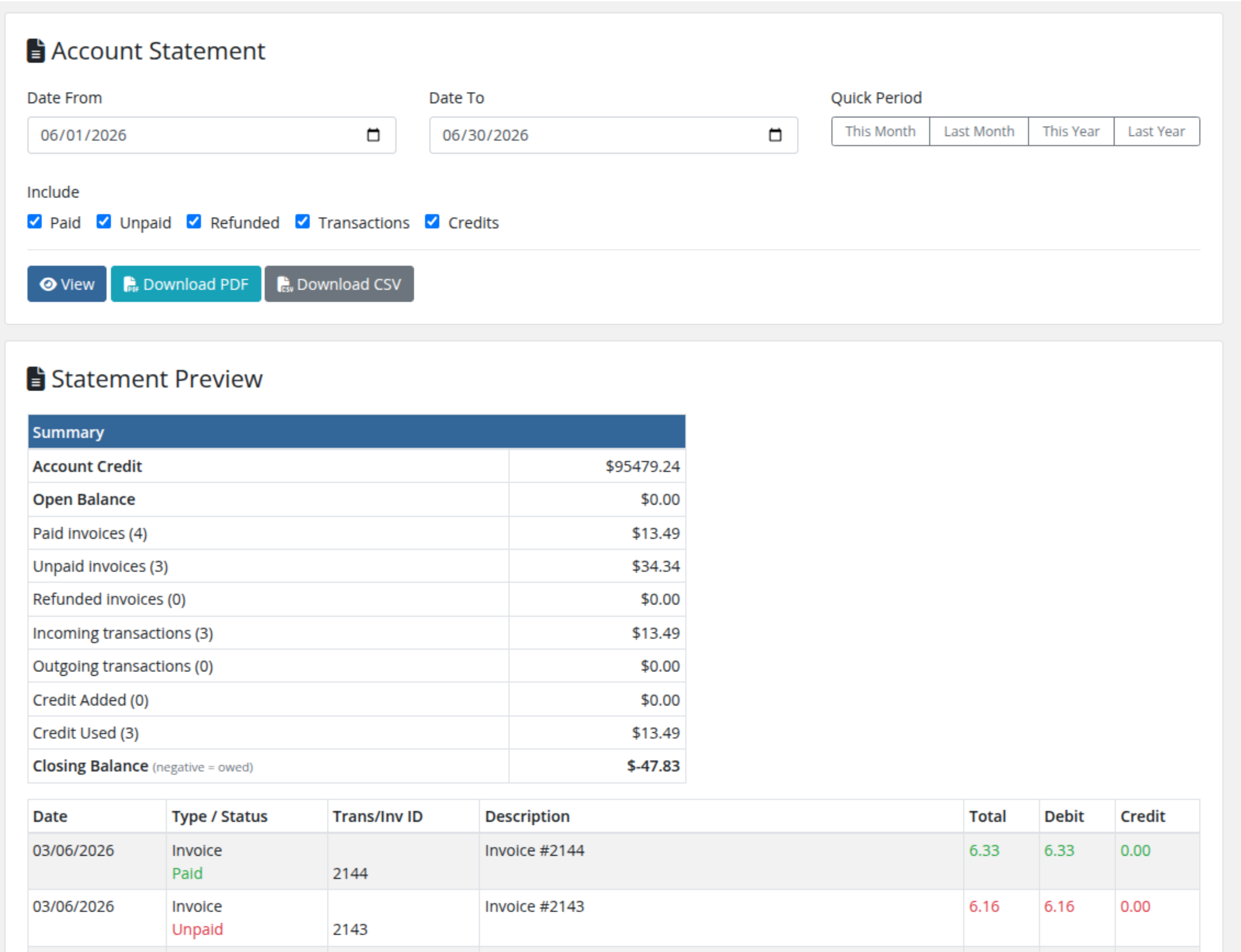
Statement Preview

After clicking **View**, the generated statement is displayed inline below the form. The preview shows the same rendered HTML statement that administrators see.



23-client-area-preview.png

Saved Statements

The bottom section shows the client's previously saved statements (generated by admin, schedule, or bulk operations):

Column	Description
Date	When the statement was generated
Period	Statement date range (from — to)
Generated By	How the statement was created: manual, schedule, or bulk
Actions	Download buttons and view link

Actions Per Saved Statement

Button	Description	Visibility
PDF	Download the statement as PDF	Always visible
CSV	Download the statement as CSV	Only if "Client Can Download CSV" is enabled
View	Open the statement via public link (if available)	Only if statement has an access hash

Pagination

When there are multiple pages of saved statements, pagination controls appear below the table with page numbers and previous/next navigation.

Important Notes

- Clients can only see their own statements — all requests are filtered by the logged-in client's ID
- The client area uses Bootstrap 4 styling (WHMCS client area) rather than Bootstrap 3 (admin area)
- Download buttons (PDF/CSV) respect the permission settings configured in the admin Settings page
- The statement is generated with the client's configured currency