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Bulk Generate

PUQ Account Statement module **WHMCS**

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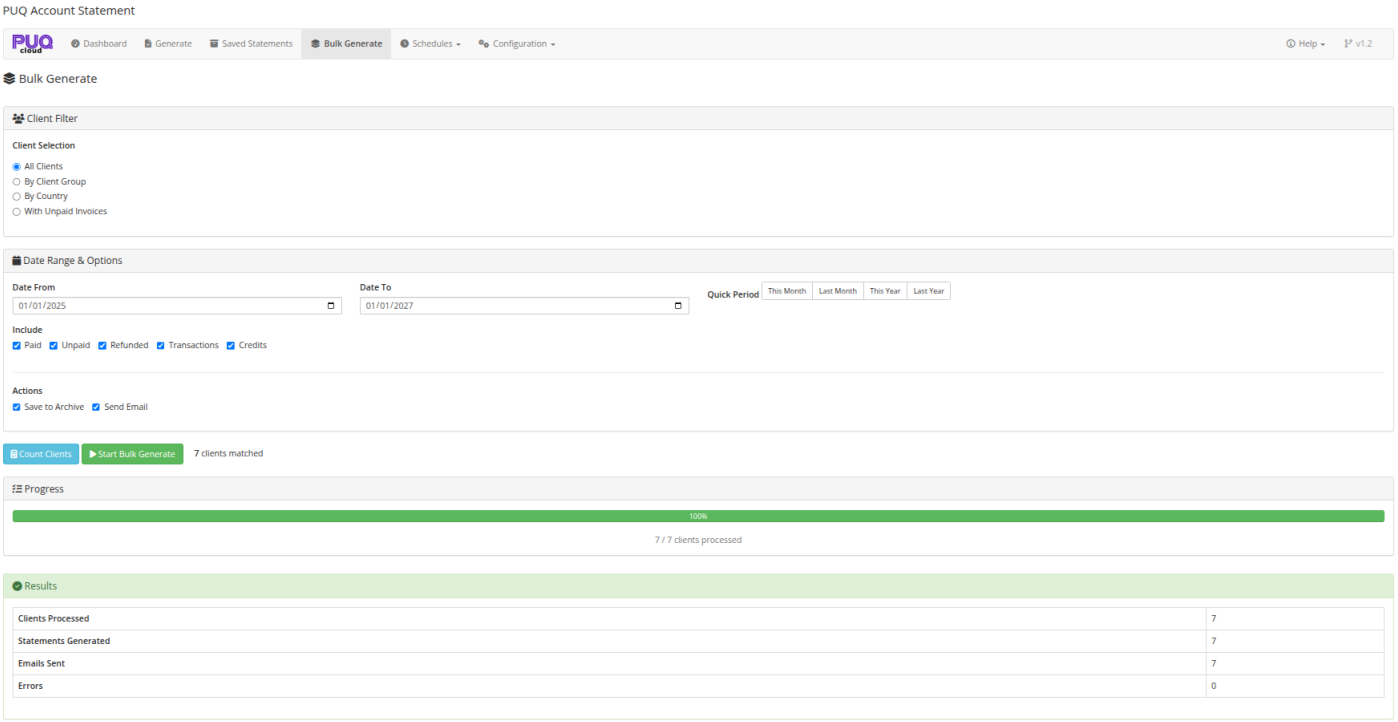
The Bulk Generate page is available at: **Addons** > **PUQ Account Statement** > **Bulk Generate**

This page allows you to generate statements for multiple clients at once with a single operation.



06-bulk-generate.png

Client Filter

Choose which clients to generate statements for:

Option	Description
All Clients	Generate for every client in the system

Option	Description
By Client Group	Filter by WHMCS client group (dropdown appears for selection)
By Country	Filter by client country (dropdown appears for selection)
With Unpaid Invoices	Only clients that have outstanding unpaid invoices

When selecting **By Client Group** or **By Country**, a dropdown field appears to select the specific group or country.

Date Range & Options

Date Range

Set the statement period using:

- **Date From** / **Date To** — manual date inputs
- **Quick Period** buttons — same presets as the Generate page (This Month, Last Month, This Year, Last Year, All Time)

The default period is set to **Last Month**.

Include Options

Same checkboxes as the Generate page:

- Paid, Unpaid, Refunded, Transactions, Credits

Actions

Choose what to do with each generated statement:

Action	Description
Save to Archive	Save each statement to the saved statements archive (checked by default)
Send Email	Send each statement to the respective client via email with PDF attachment

Workflow

Step 1: Count Clients

Click **Count Clients** to see how many clients match your filter criteria. The result appears next to the button (e.g., "**42** clients matched").

Step 2: Start Bulk Generate

After counting, the **Start Bulk Generate** button becomes enabled. Click it and confirm the operation.

Step 3: Monitor Progress

A progress bar appears showing:

- Visual progress bar with percentage
- Text counter: "X / Y clients processed"

The bulk operation processes clients in batches of 10 for optimal performance and to avoid timeouts.

Step 4: Review Results

After completion, a results panel shows:

Metric	Description
Clients Processed	Total number of clients processed
Statements Generated	Number of statements successfully created
Emails Sent	Number of emails sent (if email option was enabled)
Errors	Number of errors encountered during processing

Revision #8
Created 18 February 2026 17:09:57 by Ruslan
Updated 18 September 2026 16:22:32 by Ruslan