

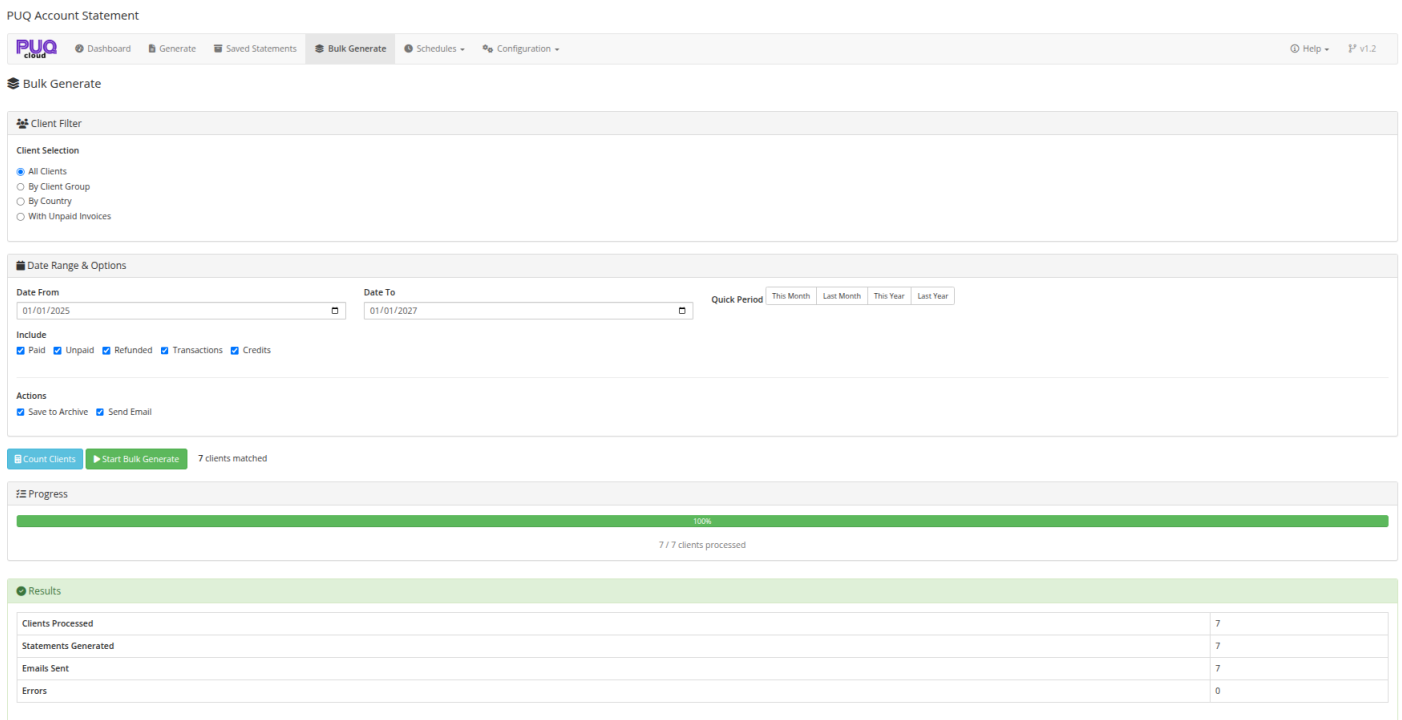
# Bulk Generate

## Account Statement addon **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
<b>By Client Group</b>	Filter by WHMCS client group (dropdown appears for selection)
<b>By Country</b>	Filter by client country (dropdown appears for selection)
<b>With Unpaid Invoices</b>	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.

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# 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)

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
<b>Save to Archive</b>	Save each statement to the saved statements archive (checked by default)
<b>Send Email</b>	Send each statement to the respective client via email with PDF attachment

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

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