

Changelog

PUQ Account Statement module **WHMCS**

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v4.0.0 — 2026-09-18

Major Architecture & Compatibility Upgrade

- **Universal ionCube Loader v15 Support:** Fully encoded with the latest ionCube 15 compiler, guaranteeing seamless execution across PHP 7.4, 8.1, 8.2, 8.3, and 8.4 environments.
- **Unencoded Hooks Architecture (v4.0.0 Standard):** Refactored `hooks.php` into an open, unencoded entrypoint delegating to `lib/puqAccountStatementHooks.php` with robust `\Throwable` error isolation and module logging.
- **WHMCS 8.x & WHMCS 9+ Compatibility:** Modernized database queries and hook registrations for complete compatibility with current and upcoming WHMCS releases.
- **Performance & Reliability Improvements:** Streamlined cron scheduling, automated statement cleanup, and client summary tab rendering.

New Features & Enhancements

- **"All Unpaid Invoices" Period Selection in Schedules:** Added automated "All Unpaid Invoices" (`all_unpaid`) period option in Schedules. The module automatically scans all unpaid and overdue invoices across all years (from `1970-01-01` to current date), ensuring outstanding balances from prior or future years (2025, 2026, 2027+) are never missed.
- **Automated Empty Statement Suppression:** When generating or scheduling statements targeting unpaid invoices, the module automatically skips clients with zero unpaid balances, preventing blank emails from being sent.
- **Interactive Database Verification Tool:** Added a "Check and Update Database

Schema" maintenance tool in Module Settings to non-destructively inspect tables and automatically add missing columns during upgrades.

- **"All Time" Quick Period Preset:** Added "All Time" period button in Manual Generation and Bulk Generation to instantly select the full history from account inception to current date.
 - **In-Memory Email Attachment Delivery:** Enhanced bulk statement email delivery by handing PDF attachments directly in-memory to the WHMCS mail pipeline via `EmailPreSend`, preventing dropped attachments on shared filesystems.
 - **Localized WHMCS System Descriptions:** Automated localization for native WHMCS transaction and credit descriptions (e.g. `Invoice Payment`, `Credit Applied to Invoice`, `Credit Removed`, `Reason: Order status changed to Cancelled`, `Overpayment`, `Mass Invoice Payment Credit for Invoice`).
 - **Complete 26-Language Localization:** Added translations for all new schedule and database maintenance strings across all 26 supported language files.
 - **Template Scanner Refinement:** PDF template discovery now ignores draft and hidden files starting with `_` or `.` (e.g. `_classic.tpl`), avoiding duplicate or confusing template selections.
 - **Documentation Fixes & Updated Screenshots:** Corrected BookStack canonical documentation links and updated administrative screenshots for Schedule Editor and Settings.
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v1.2 — 2026-06-05

The clarity update. Your customers now see, at a glance, *exactly how much they owe* — in their own language and in your date format.

New Features

- **Real outstanding balance.** The Closing Balance now reflects what the customer actually owes (negative = owed), and it ties out perfectly with the Debit and Credit columns of the statement. No more confusing `[$0.00]` closing balances when there are unpaid invoices.
- **Account Credit shown separately.** Statements now display both the client's **Account Credit** and the **amount owed**, so the two are never mixed up.
- **Carry-forward opening balance.** The Open Balance now includes outstanding invoices from before the statement period — perfect for statements that start mid-history.
- **Multilingual statements.** PDF, on-screen preview, and CSV exports are now generated in the **client's own language**, with automatic fallback to your system language and then English. Fully translated across **25 languages**.
- **"Show Open Balance" setting.** Hide the Open Balance line entirely if you only want to show the amount owed.

Improvements

- **Dates follow your WHMCS Global Date Format.** Statement dates now respect the format configured in WHMCS (e.g. `[DD/MM/YYYY]`) instead of a fixed format.
- **Smarter client search.** The admin client search now matches **first name + last name** together (in any order), as well as company, email, or client ID.
- **Client area language.** The client area now displays in the logged-in customer's own language.
- **CSV summary fixed & expanded.** The CSV summary section now shows correct values (including Account Credit and amount owed) and is included with emailed/attached exports.

Bug Fixes

- Fixed the running-balance column in the **Detailed** PDF template (it previously never updated and used the wrong sign).
- Fixed mixed-language output where the statement preview and PDF stayed in English regardless of the selected language.

v1.1 — 2026-02-25

Bug Fixes

- Fixed "Call to undefined function puq_account_statement_LoadLang()" error on customer

Improvements

- All monetary values now consistently display with 2 decimal places (e.g., `0.00`, `5.10` instead of `0` or `5.1`)
- Removed currency symbol from the Total column in statements for uniform formatting with Debit and Credit columns

New Features

- Added "Show Payment Method" setting to control visibility of the Payment Method column in statements
 - When disabled, the Payment Method column is hidden across all views: admin preview, PDF exports, and CSV exports
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v1.0 — 2026-02-18

First release.

New Features

- Statement generation for individual clients with customizable date ranges
- Invoice filtering by status: Paid, Unpaid, Refunded
- Transaction and credit entry inclusion in statements
- Payment method and product group filtering
- Quick period presets: This Month, Last Month, This Year, Last Year
- PDF export with multiple templates: Classic, Modern, Detailed (Portrait & Landscape)
- CSV export for data analysis
- PDF Style editor: typography, colors, display options, header/footer text, custom CSS
- Saved statements archive with search, filter, and pagination
- Bulk generation for multiple clients with progress tracking
- Client filters for bulk: All Clients, By Client Group, By Country, With Unpaid Invoices
- Scheduled automatic statement generation (Daily, Weekly, Monthly, Quarterly, Yearly)
- Schedule management: create, edit, toggle, run now, delete
- Client area self-service: view, generate, and download statements
- Client area configurable permissions: PDF download, CSV download
- Email delivery with PDF attachment using WHMCS email templates
- Public shareable links with configurable expiry
- Aging report for overdue invoice analysis

- Dashboard with key metrics, quick generate, recent statements, upcoming schedules
 - Auto-cleanup of old saved statements
 - Configurable per-page pagination
 - Add to Billing Menu option for client area
 - AJAX-based interface with loading spinners on all actions
 - License verification system with online/offline modes
 - Dashboard accessible without active license, other pages restricted
 - Error logging via WHMCS `|logModuleCall|`
 - English language interface
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