

Client Area

Account Statement addon **WHMCS**

[Order now](#) | [Download](#) | [FAQ](#)

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:



Home Services ▾ Domains ▾ Billing ▾ Support ▾ Open Ticket

Portal Home / Client Area

Your Info ^

Ruslan Polovyi
Filtrowa 61
Address 2

My Invoices

My Quotes

Add Funds

Account Statement

3

DOMAINS

22-client-

billing-menu.png



Search our knowledgebase...



Home Services ▾ Domains ▾ Billing ▾ Support ▾ Open Ticket

Hello, ruslan! ▾

Portal Home / Account Statement

Account Statement

Date From

06/01/2026

Date To

06/30/2026

Quick Period

This Month

Last Month

This Year

Last Year

Include

☒ Paid ☒ Unpaid ☒ Refunded ☒ Transactions ☒ Credits

View

Download PDF

Download CSV

Saved Statements

Date	Period	Generated By	Actions
2026-06-04 18:52:15	2026-05-01 — 2026-05-31	schedule	PDF CSV View
2026-06-04 18:50:28	2026-06-01 — 2026-06-30	Ruslan Polovyi	PDF CSV View
2026-06-04 18:50:27	2026-06-01 — 2026-06-30	manual	PDF CSV View
2026-06-04 18:50:25	2026-06-01 — 2026-06-30	manual	PDF CSV
2026-06-04 18:46:32	2025-01-01 — 2027-01-01	bulk	PDF CSV View

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

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.

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
-

Revision #6

Created 18 February 2026 17:10:12 by Ruslan

Updated 5 June 2026 14:27:19 by Ruslan