

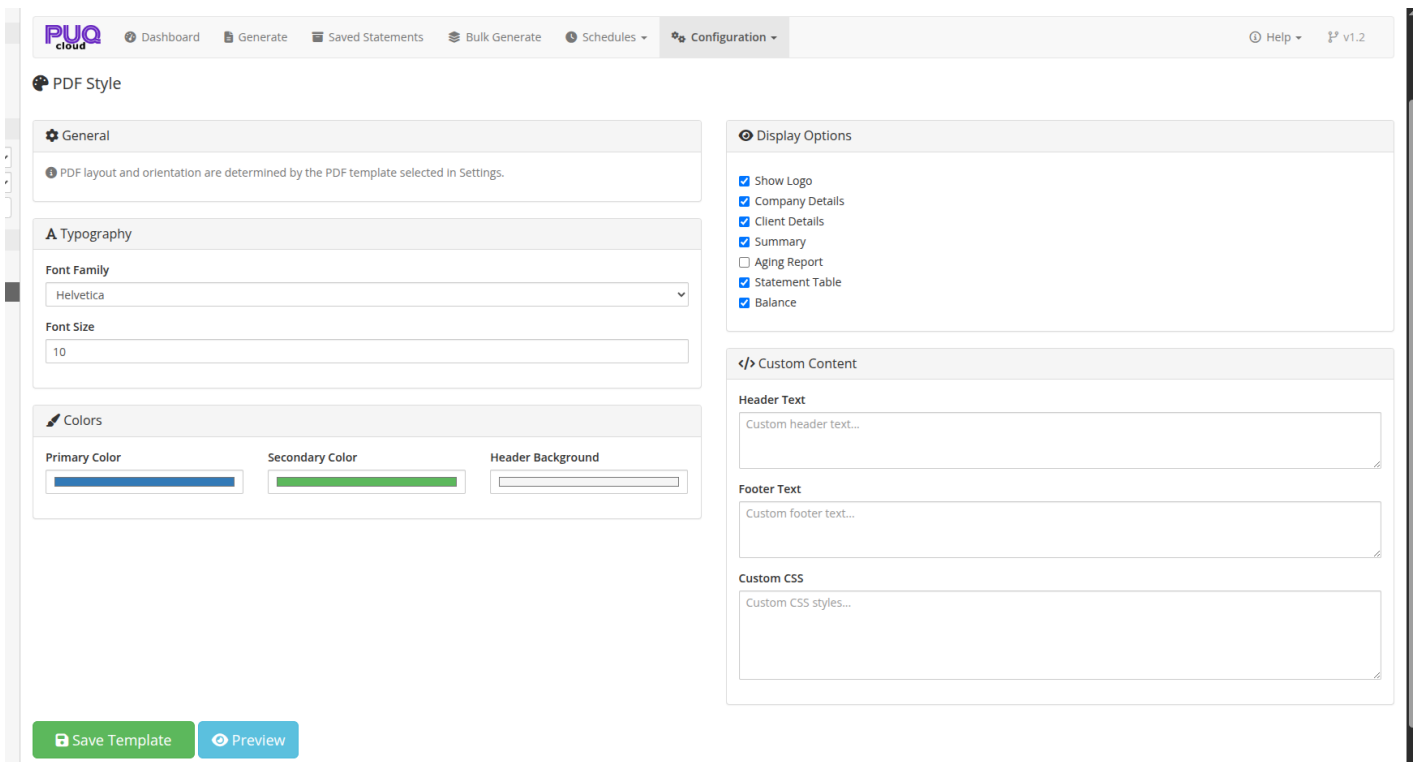
PDF Style

Account Statement addon **WHMCS**

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The PDF Style page is available at: **Addons > PUQ Account Statement > Configuration > PDF Style**

This page allows you to customize the appearance and content of generated PDF statements.



09-pdf-style.png

General

An informational note that PDF layout and orientation are determined by the PDF template selected in the Settings page. The Style editor controls visual appearance within the selected template.

Typography

Setting	Description
Font Family	Choose the PDF font: Helvetica, Times, Courier, DejaVu Sans, Free Serif
Font Size	Base font size in points (6-24, default: 10)

“ **Tip:** Use **DejaVu Sans** or **Free Serif** for full Unicode character support (Cyrillic, Asian characters, etc.).

Colors

Setting	Description
Primary Color	Main color used for headings, table headers, and accents (default: #337ab7)
Secondary Color	Secondary color for subtitles and less prominent text (default: #555555)
Header Background	Background color for table header rows (default: #f5f5f5)

Display Options

Toggle which sections appear in the generated PDF:

Option	Description
Show Logo	Display the company logo at the top of the statement
Company Details	Show company name, address, and contact information
Client Details	Show client name, address, and contact information

Option	Description
Summary	Show the financial summary section (totals for invoices, transactions, credits)
Aging Report	Show the aging report section for overdue invoice analysis
Statement Table	Show the detailed statement table with individual line items
Balance	Show the running balance and final balance totals

Custom Content

Setting	Description
Header Text	Custom text displayed at the top of the statement (below the logo/company info)
Footer Text	Custom text displayed at the bottom of the statement
Custom CSS	Additional CSS styles applied to the PDF. Use for fine-tuning fonts, spacing, borders, etc.

Preview

Click the **Preview** button to generate a sample PDF with the current (unsaved) settings. This opens the PDF in a new browser tab so you can review changes before saving.

“ **Note:** The preview uses current unsaved settings, allowing you to experiment without affecting live statements.

Saving

Click **Save Template** to save all style settings. These settings apply globally to all PDF statements generated by the module.

PDF Template Examples

The module includes several built-in PDF templates. The template is selected in **Settings > PDF Template**.

Classic (Portrait)

Traditional bank statement layout with bordered table and alternating rows.

Account Statement

PUQcloud

PUQ Software
Business Number: 785655176
Winnipeg, MB, R2M 3C1
Canada
VAT: PL5252834345

Statement Period: 01/06/2026 - 30/06/2026

Ruslan Polovyi	Account Credit:	\$95479.24
Filtrowa 61	Open Balance:	\$0.00
Address 2	Paid invoices (4):	\$13.49
Warszwa, Mas, 02-502	Unpaid invoices (3):	\$34.34
PL	Refunded invoices (0):	\$0.00
	Incoming transactions (3):	\$13.49
	Outgoing transactions (0):	\$0.00
	Credit Added (0):	\$0.00
	Credit Used (3):	\$13.49
	Closing Balance:	-\$47.83

Date	Type / Status	Trans/Inv ID	Description	Total	Debit	Credit
03/06/2026	Invoice Paid	2144	Invoice #2144	6.33	6.33	0.00
03/06/2026	Invoice Unpaid	2143	Invoice #2143	6.16	6.16	0.00
03/06/2026	Invoice Paid	2142	Invoice #2142	0.00	0.00	0.00
03/06/2026	Invoice Paid	2141	Invoice #2141	4.41	4.41	0.00
03/06/2026	Transaction Incoming	2144	Applied Credit Note funded by Client Credit	6.33	0.00	6.33

12-pdf-classic.png

Classic (Landscape)

Same classic layout in landscape orientation, showing more columns.

Bill To: Ruslan Polovyi
 Filtrowa 61, Warszawa, Mas, 02-502, PL

Account Credit: **Open Balance:** \$0.00 Paid(4): \$13.49 Unpaid(3): \$34.34 **Closing Balance:** **\$-47.83**
 \$95479.24

Date	Type	Status	Inv. ID	Trans. ID	Description	Total	Debit	Credit
03/06/2026	Invoice	Paid	2144		Invoice #2144	6.33	6.33	0.00
03/06/2026	Invoice	Unpaid	2143		Invoice #2143	6.16	6.16	0.00
03/06/2026	Invoice	Paid	2142		Invoice #2142	0.00	0.00	0.00
03/06/2026	Invoice	Paid	2141		Invoice #2141	4.41	4.41	0.00
03/06/2026	Transaction	Incoming	2144		Applied Credit Note funded by Client Credit	6.33	0.00	6.33
03/06/2026	Transaction	Incoming	2141		Applied Credit Note funded by Client Credit	4.41	0.00	4.41
03/06/2026	Credit	Using	2144		Fund Credit Note 401 for Invoice #2144	-6.33	6.33	0.00
03/06/2026	Credit	Using	2141		Fund Credit Note 400 for Invoice #2141	-4.41	4.41	0.00
02/06/2026	Invoice	Paid	2140		Invoice #2140	2.75	2.75	0.00
02/06/2026	Invoice	Unpaid	2139		Invoice #2139	22.02	22.02	0.00
02/06/2026	Invoice	Unpaid	2138		Invoice #2138	6.16	6.16	0.00
02/06/2026	Transaction	Incoming	2140		Applied Credit Note funded by Client Credit	2.75	0.00	2.75
02/06/2026	Credit	Using	2140		Fund Credit Note 399 for Invoice #2140	-2.75	2.75	0.00

13-pdf-classic-landscape.png

Modern (Portrait)

Clean modern design with color-coded summary cards and running balance column.



PUQ sp. z o.o.
NIP: 5252834345
VAT-UE: PL5252834345
Adres: ul. Szcz?sna 26,
02-454 Warszawa
Numer konta: 31 1140 2004 0000 3602 8195 7074
Numer rachunku VAT: 55 1140 2004 0000 3603 0086 3785
VAT: PL5252834345

ACCOUNT STATEMENT

Period: 2025-01-01 - 2025-12-31
Client #1

Bill To: Ruslan Polovyi Filtrowa 61 Address 2 Warszwa, Mas, 02-502 PL ruslan.polovyi@puq.pl +48.1111111111					Open Balance:	\$95952.78	
					Paid (5):	\$5466.12	
					Unpaid (1):	\$2.46	
					Refunded (0):	\$0.00	
					In Trans. (8):	\$7478.65	
					Out Trans. (0):	\$0.00	
					Credit Added (2):	\$101.10	
					Credit Used (51):	\$1157.03	
					Closing Balance:	\$94896.85	
Date	Type	Status	Inv #	Description	Debit	Credit	Balance
2025-12-29	Invoice	Paid	1870	Invoice #in-337	0	0	95,952.78
2025-12-29	Invoice	Paid	1869	Invoice #in-336	0	0	95,952.78
2025-12-29	Credit	Using	1870	Credit Applied to Invoice #1870	1	0	95,952.78
2025-12-29	Credit	Using	1869	Credit Applied to Invoice #1869	2	0	95,952.78
2025-11-14	Invoice	Paid	1866	Invoice #in-333	0	0	95,952.78
2025-11-14	Invoice	Paid	1865	Invoice #in-332	0	0	95,952.78
2025-11-14	Invoice	Unpaid	1863	Invoice #pro-526	2.46	0	95,952.78
2025-11-14	Credit	Using	1866	Credit Applied to Invoice #1866	61.5	0	95,952.78
2025-11-14	Credit	Using	1865	Credit Applied to Invoice #1865	2.46	0	95,952.78
2025-10-22	Invoice	Paid	1857	Invoice #in-330	5466.12	0	95,952.78

14-pdf-modern.png

Detailed (Portrait)

Comprehensive layout with full company details, client information, and detailed transaction table.

ACCOUNT STATEMENT

2025-01-01 — 2025-12-31



PUQ sp. z o.o.
NIP: 5252834345
VAT-UE: PL5252834345
Adres: ul. Szcz?sna 26,
02-454 Warszawa
Numer konta: 31 1140 2004 0000 3602 8195 7074
Numer rachunku VAT: 55 1140 2004 0000 3603 0086
3785
VAT: PL5252834345

BILL TO

Ruslan Polovyi
Filtrowa 61
Address 2
Warszwa, Mas, 02-502
PL

SUMMARY

Open Balance:	\$95952.78
Paid Invoices (5):	\$5466.12
Unpaid Invoices (1):	\$2.46
Refunded (0):	\$0.00
In Trans. (8):	\$7478.65
Out Trans. (0):	\$0.00
Credit Added (2):	\$101.10
Credit Used (51):	\$1157.03
Closing Balance:	\$94896.85

TRANSACTIONS

Date	Type / Status	Trans/Inv ID	Description	Total	Debit	Credit	Pay. Method
2025-12-29	Invoice Paid	1870	Invoice #in-337	\$0.00	0	0	paypalcheck out
2025-12-29	Invoice Paid	1869	Invoice #in-336	\$0.00	0	0	paypalcheck out
2025-12-29	Credit Using	1870	Credit Applied to Invoice #1870	-\$1.00	1	0	
2025-12-29	Credit Using	1869	Credit Applied to Invoice #1869	-\$2.00	2	0	
2025-11-14	Invoice Paid	1866	Invoice #in-333	\$0.00	0	0	paypalcheck out
2025-11-14	Invoice	1865	Invoice	\$0.00	0	0	paypalcheck

15-pdf-detailed.png

Modern (Landscape)

Modern layout in landscape orientation with expanded column space.



FROM

PUQ sp. z o.o.
NIP: 5252834345
VAT-UE: PL5252834345
Adres: ul. Szczytna 26,
02-454 Warszawa
Numer konta: 31 1140 2004 0000
3602 8195 7074
Numer rachunku VAT: 55 1140
2004 0000 3603 0086 3785
VAT: PL5252834345

BILL TO

Ruslan Poloviy
Filtrowa 61
Address 2
Warszwa
Mas 02-502
PL

SUMMARY

Open: \$95952.78
Paid: \$5466.12
Unpaid: \$2.46
Close: \$94896.85

ACCOUNT STATEMENT

2025-01-01 — 2025-12-31

Date	Type	Status	Inv #	Description	Debit	Credit	Gateway
2025-12-29	Invoice	Paid	1870	Invoice #in-337	0	0	paypalcheckout
2025-12-29	Invoice	Paid	1869	Invoice #in-336	0	0	paypalcheckout
2025-12-29	Credit	Using	1870	Credit Applied to Invoice #1870	1	0	
2025-12-29	Credit	Using	1869	Credit Applied to Invoice #1869	2	0	
2025-11-14	Invoice	Paid	1866	Invoice #in-333	0	0	paypalcheckout
2025-11-14	Invoice	Paid	1865	Invoice #in-332	0	0	paypalcheckout
2025-11-14	Invoice	Unpaid	1863	Invoice #pro-526	2.46	0	paypalcheckout
2025-11-14	Credit	Using	1866	Credit Applied to Invoice #1866	61.5	0	
2025-11-14	Credit	Using	1865	Credit Applied to Invoice #1865	2.46	0	
2025-10-22	Invoice	Paid	1857	Invoice #in-329	5466.12	0	paypalcheckout
2025-10-22	Transaction	Incoming	1859	Invoice Payment	0	409.59	puq_nowpayments
2025-10-22	Transaction	Incoming	1857	Invoice Payment	0	5466.12	paypalcheckout
2025-10-20	Credit	Using	1854	Credit Applied to Invoice #1854	18.33	0	
2025-10-16	Credit	Using	1847	Credit Applied to Invoice #1847	0.62	0	
2025-09-21	Transaction	Incoming	1780	Invoice Payment	0	682.65	paypalcheckout
2025-09-21	Transaction	Incoming	1779	Invoice Payment	0	682.64	paypalcheckout
2025-09-21	Transaction	Incoming	1778	Invoice Payment	0	136.53	paypalcheckout
2025-09-21	Transaction	Incoming	1777	Invoice Payment	0	100	paypalcheckout
2025-09-21	Credit	Adding	1777	Add Funds Invoice #1777	0	100	
2025-08-22	Credit	Using	1659	Credit Applied to Invoice #1659	3.08	0	

2025-08-20	Credit	Using	1654	Credit Applied to Invoice #1654	3.08	0	
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16-pdf-modern-landscape.png

Summary (Landscape)

Executive summary format with color-coded totals and compact transaction table.

PUQ sp. z o.o.
 NIP: 5252834345
 VAT-UE: PL5252834345
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 02-454 Warszawa
 Numer konta: 31 1140 2004 0000 3602 8195 7074
 Numer rachunku VAT: 55 1140 2004 0000 3603 0086 3785
 VAT: PL5252834345

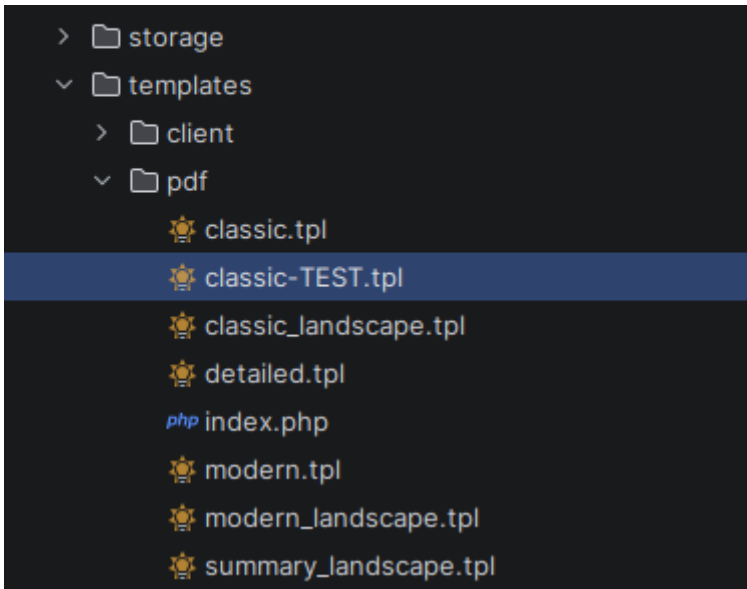
Ruslan Polovyi
 Filtrowa 61, Warszawa, PL

OPENING		PAID (5)		UNPAID (1)		CREDITS		CLOSING	
\$95952.78		\$5466.12		\$2.46		\$101.10		\$94896.85	
Date	Type	Status	Inv #	Description	Debit	Credit	Gateway		
2025-12-29	Invoice	Paid	1870	Invoice #in-337	0	0	paypalcheckout		
2025-12-29	Invoice	Paid	1869	Invoice #in-336	0	0	paypalcheckout		
2025-12-29	Credit	Using	1870	Credit Applied to Invoice #1870	1	0			
2025-12-29	Credit	Using	1869	Credit Applied to Invoice #1869	2	0			
2025-11-14	Invoice	Paid	1866	Invoice #in-333	0	0	paypalcheckout		
2025-11-14	Invoice	Paid	1865	Invoice #in-332	0	0	paypalcheckout		
2025-11-14	Invoice	Unpaid	1863	Invoice #pro-526	2.46	0	paypalcheckout		
2025-11-14	Credit	Using	1866	Credit Applied to Invoice #1866	61.5	0			
2025-11-14	Credit	Using	1865	Credit Applied to Invoice #1865	2.46	0			
2025-10-22	Invoice	Paid	1857	Invoice #in-329	5466.12	0	paypalcheckout		
2025-10-22	Transaction	Incoming	1859	Invoice Payment	0	409.59	puq_nowpayments		
2025-10-22	Transaction	Incoming	1857	Invoice Payment	0	5466.12	paypalcheckout		
2025-10-20	Credit	Using	1854	Credit Applied to Invoice #1854	18.33	0			
2025-10-16	Credit	Using	1847	Credit Applied to Invoice #1847	0.62	0			
2025-09-21	Transaction	Incoming	1780	Invoice Payment	0	682.65	paypalcheckout		
2025-09-21	Transaction	Incoming	1779	Invoice Payment	0	682.64	paypalcheckout		
2025-09-21	Transaction	Incoming	1778	Invoice Payment	0	136.53	paypalcheckout		
2025-09-21	Transaction	Incoming	1777	Invoice Payment	0	100	paypalcheckout		
2025-09-21	Credit	Adding	1777	Add Funds Invoice #1777	0	100			

17-pdf-summary-landscape.png

Custom PDF Templates

You can create custom PDF templates by adding `.tpl` files to the `templates/pdf/` directory.



18-pdf-templates-tree.png

Each template file must start with a PHP comment header that defines its metadata:

```
<?php
// Template: My Custom Template
// Orientation: P
// Paper: A4
// Description: My custom statement layout
```

```

1 <?php
2 // Template: Classic-TEST
3 // Orientation: P
4 // Paper: A4
5 // Description: Traditional bank statement with bordered table and alternating rows
6
7 $primaryColor = htmlspecialchars($config['primary_color'] ?? '#337ab7');
8 $secondaryColor = htmlspecialchars($config['secondary_color'] ?? '#5cb85c');
9 $headerBg = htmlspecialchars($config['header_bg_color'] ?? '#f5f5f5');
10 $fontSize = (int)($config['font_size'] ?? 10);
11 ?>
12 <style>td { vertical-align: top; }</style>
13 <?php if (!empty($config['custom_css'])): ?>
14 <style><?php echo $config['custom_css']; ?></style>
15 <?php endif; ?>
16
17 <!-- Header Banner -->
18 <table cellpadding="8"><tr>
19     <td style="background-color: #f5f5f5;">ACCOUNT STATEMENT</td>
20 </tr></table>
21 <br>
22
23 <?php if (!empty($config['header_text'])): ?>
24 <table cellpadding="3"><tr><td style="background-color: #f5f5f5;"><?php echo htmlspecialchars($config['header_text']); ?></td></tr></table>
25 <?php endif; ?>
26
27 <!-- Company + Logo -->
28 <?php if (!empty($config['show_company_details'])): ?>
29 <table cellpadding="3"><tr>
30     <td style="background-color: #f5f5f5;">
31         <?php if (!empty($config['show_logo']) && !empty($company['logo_path'])): ?>
32             <br>
33         <?php endif; ?>
34     </td>
35     <td style="background-color: #f5f5f5;">
36         <?php foreach ($company['address_lines'] as $line): ?>
37             <?php echo htmlspecialchars($line); ?><br>
38         <?php endforeach; ?>
39         <?php if (!empty($company['tax_code'])): ?>
40             VAT: <?php echo htmlspecialchars($company['tax_code']); ?><br>
41         <?php endif; ?>

```

19-pdf-template-code.png

Template Header Fields

Field	Description
Template	Display name shown in the Settings dropdown
Orientation	P for Portrait, L for Landscape
Paper	Paper size: A4 , Letter , etc.
Description	Optional description shown as tooltip

Available Template Variables

Templates receive the following variables:

Variable	Description
<code>config</code>	Style settings (colors, fonts, display options) from the PDF Style page
<code>company</code>	Company details (name, address, logo, tax info)
<code>statement</code>	Statement data (client info, period, invoices, transactions, credits, summary)

After adding a new template file, it automatically appears in the **Settings > PDF Template** dropdown.

Revision #6

Created 18 February 2026 17:10:06 by Ruslan

Updated 5 June 2026 14:27:17 by Ruslan