

Saved Statements

Account Statement addon **WHMCS**

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The Saved Statements page is available at: **Addons > PUQ Account Statement > Saved Statements**

This page shows all previously saved account statements with filtering, pagination, and management tools.

PUQ Account Statement

#	Client	Period	Generated By	Generated At	Status	Actions
5	Julia Noga july.noga@gmail.com	2025-01-01 - 2027-01-01	bulk	2026-06-04 18:46:41	ACTIVE	
6	yahoo testq it.puq@yahoo.com	2025-01-01 - 2027-01-01	bulk	2026-06-04 18:46:41	ACTIVE	
7	Outlook Test it.puq@outlook.com	2025-01-01 - 2027-01-01	bulk	2026-06-04 18:46:41	ACTIVE	
4	Julia Noga (Test Company) yulia.noha@puq.pl	2025-01-01 - 2027-01-01	bulk	2026-06-04 18:46:38	ACTIVE	
3	Super User test.puq@gmail.com	2025-01-01 - 2027-01-01	bulk	2026-06-04 18:46:37	ACTIVE	
2	Dmytro Kravchenko dmytro.kravchenko@puq.pl	2025-01-01 - 2027-01-01	bulk	2026-06-04 18:46:34	ACTIVE	
1	Ruslan Poloviyi ruslan@poloviyi.com	2025-01-01 - 2027-01-01	bulk	2026-06-04 18:46:32	ACTIVE	

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Filters

The top panel provides search and filter options:

Filter	Description
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Client	Search for a specific client by name or email (Select2 AJAX search)
Date From	Filter statements created from this date
Date To	Filter statements created up to this date
Generated By	Filter by generation method: All, Manual, Schedule, or Bulk

Click **Filter** to apply the filters and reload the results.

Statements Table

The main table lists saved statements with the following columns:

Column	Description
#	Statement ID
Client	Client name, company name, and email
Period	Statement date range (from — to)
Generated By	How the statement was created: manual, schedule, or bulk
Generated At	Timestamp when the statement was generated
Status	Badge: Active (green) or expired status
Actions	Action buttons (see below)

Actions Per Statement

Each statement row has the following action buttons:

Button	Icon	Description
PDF	file-pdf	Download/view the statement as PDF (opens in new tab)
CSV	file-csv	Download the statement data as CSV
Send	envelope	Send the statement to the client via email with PDF attachment
Copy Link	link	Generate a public shareable link and copy it to clipboard

Button	Icon	Description
Delete	trash	Delete the saved statement (requires confirmation)

Pagination

When there are more statements than the configured per-page limit (default: 25), pagination controls appear at the bottom of the table with page numbers and previous/next navigation.

Auto-Cleanup

Saved statements can be automatically deleted after a configurable number of days. This is set in **Settings > Auto Cleanup Days**. Set to 0 to disable auto-cleanup.

Revision #6

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