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Schedule Editor

PUQ Account Statement module **WHMCS**

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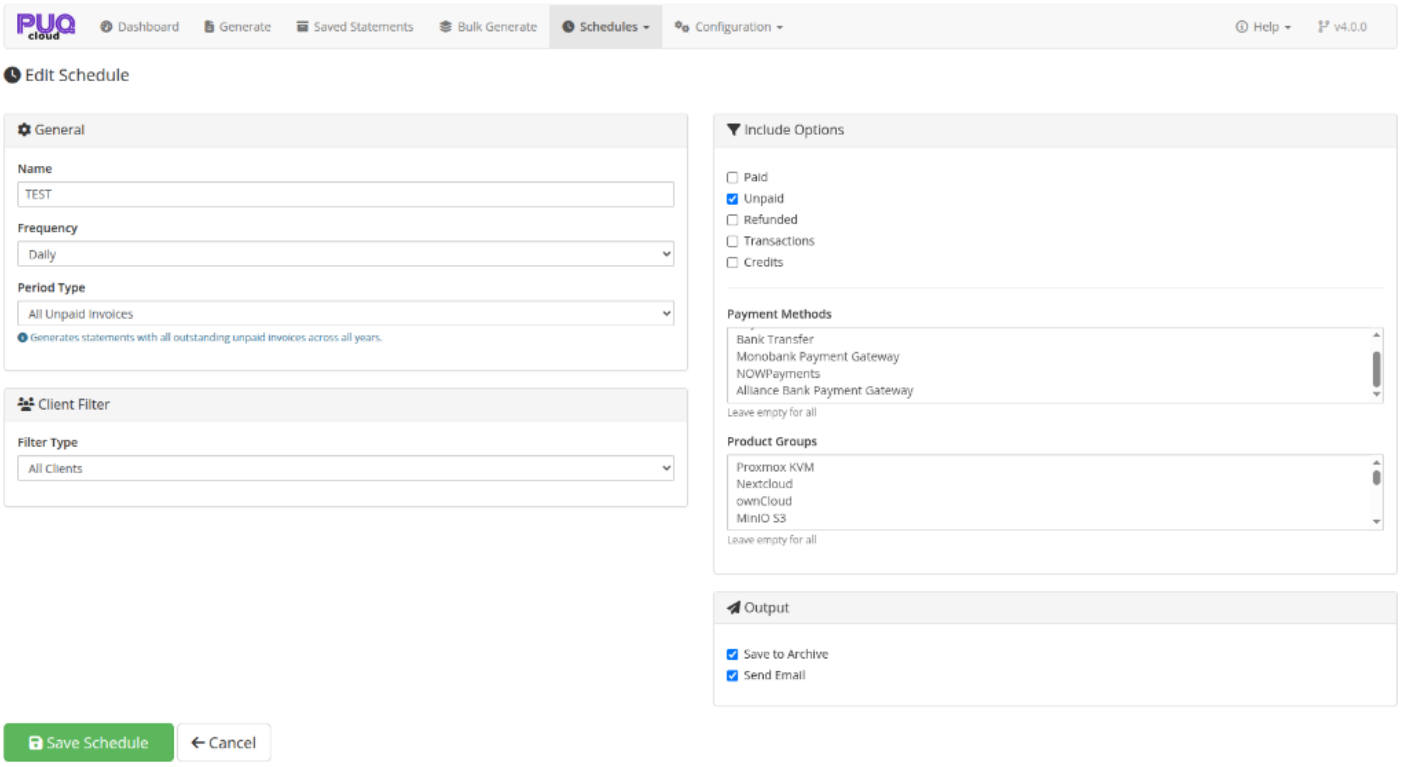
The Schedule Editor page is available at: **Addons** > **PUQ Account Statement** > **Schedules** > **Add Schedule** (or click **Edit** on an existing schedule)

This page allows you to create or edit an automated statement generation schedule.



08-schedule-edit.png

General Settings

Setting	Description

Name	A descriptive name for the schedule (e.g., "Monthly Client Statements")
Frequency	How often the schedule runs: Daily, Weekly, Monthly, Quarterly, Yearly
Period Type	What period the statement covers: Last Week, Last Month, Last Quarter, Last Year, All Time, or All Unpaid Invoices

> [!TIP] **All Unpaid Invoices Period Type:** Choosing **All Unpaid Invoices** sets the statement to cover all unpaid and overdue invoices regardless of when they were issued (from `1970-01-01` to current date). This ensures clients with unpaid invoices from any prior or current year (e.g., 2025, 2026, 2027) will see all their outstanding balances in one clean statement. Pair this with the **With Unpaid Invoices** client filter and check only **Unpaid** under **Include Options**.

Client Filter

Choose which clients receive statements when the schedule runs:

Filter	Description
All Clients	Generate for every client
By Client Group	Only clients in a specific WHMCS client group
By Country	Only clients from a specific country
With Unpaid Invoices	Only clients with outstanding invoices

When selecting **By Client Group** or **By Country**, a text field appears to enter the filter value.

Include Options

Configure what financial data to include in the generated statements:

- **Paid** — include paid invoices
- **Unpaid** — include unpaid invoices
- **Refunded** — include refunded invoices
- **Transactions** — include payment transactions
- **Credits** — include credit entries

Advanced Filters

Filter	Description
Payment Methods	Only include invoices paid via specific gateways (multi-select, leave empty for all)
Product Groups	Only include invoices for specific product groups (multi-select, leave empty for all)

Output

Configure what happens with each generated statement:

Option	Description
Save to Archive	Save the statement to the saved statements archive (checked by default)
Send Email	Send the statement to the client via email with PDF attachment

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Saving

Click **Save Schedule** to create or update the schedule. After saving a new schedule, the page reloads with the schedule ID in the URL for future editing.

Click **Cancel** to return to the schedules list without saving.

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