

# Schedule Editor

## Account Statement addon **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.

PUQ Account Statement

Dashboard | Generate | Saved Statements | Bulk Generate | Schedules | Configuration | Help | v1.2

### Add Schedule

#### General

Name:

Frequency:

Period Type:

#### Client Filter

Filter Type:

#### Include Options

- Paid
- Unpaid
- Refunded
- Transactions
- Credits

#### Payment Methods

PayPal  
Bank Transfer  
Monobank Payment Gateway  
NOWPayments

Leave empty for all

#### Product Groups

HOSTING  
Proxmox KVM  
Support  
PUQVPNCP

Leave empty for all

#### Output

- Save to Archive
- Send Email

08-schedule-edit.png

# General Settings

Setting	Description
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<b>Name</b>	A descriptive name for the schedule (e.g., "Monthly Client Statements")
<b>Frequency</b>	How often the schedule runs: Daily, Weekly, Monthly, Quarterly, Yearly
<b>Period Type</b>	What period the statement covers: Last Month, Last Quarter, Last Year, or Custom

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## Client Filter

Choose which clients receive statements when the schedule runs:

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

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

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## 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
<b>Payment Methods</b>	Only include invoices paid via specific gateways (multi-select, leave empty for all)
<b>Product Groups</b>	Only include invoices for specific product groups (multi-select, leave empty for all)

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# Output

Configure what happens with each generated statement:

Option	Description
<b>Save to Archive</b>	Save the statement to the saved statements archive (checked by default)
<b>Send Email</b>	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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Revision #6

Created 18 February 2026 17:10:01 by Ruslan

Updated 5 June 2026 14:27:16 by Ruslan