

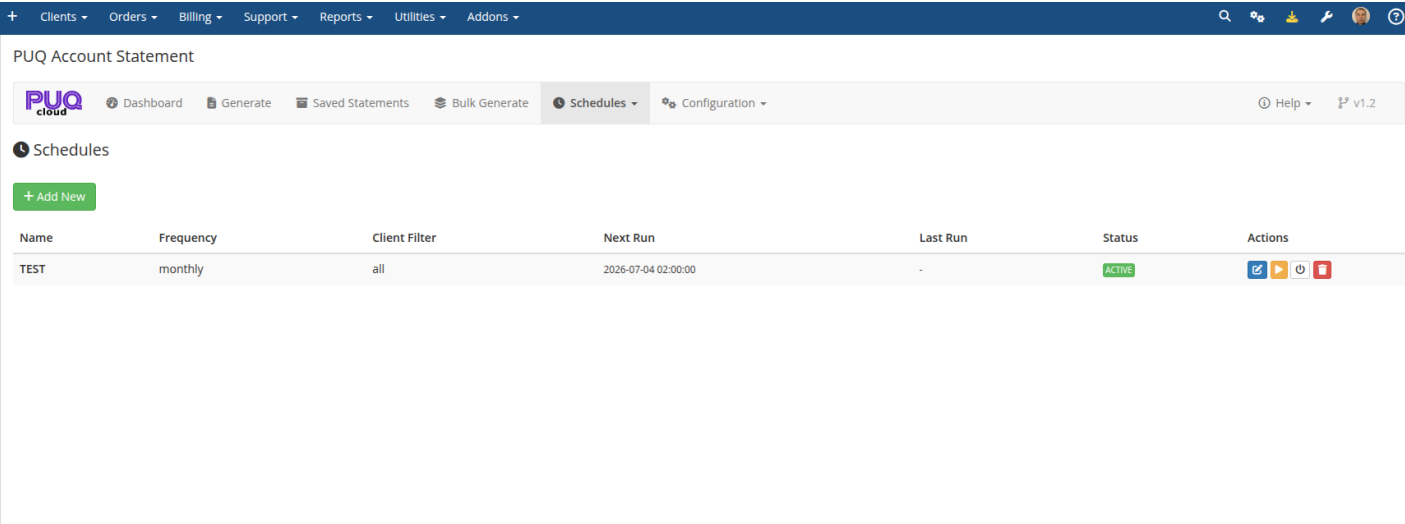
Schedules

PUQ Account Statement module **WHMCS**

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The Schedules page is available at: **Addons > PUQ Account Statement > Schedules > All Schedules**

This page manages automated statement generation schedules. Schedules run automatically via WHMCS cron.



07-schedules.png

Schedules Table

The table lists all configured schedules with the following columns:

Column	Description
Name	Schedule name for identification
Frequency	How often it runs: Daily, Weekly, Monthly, Quarterly, Yearly

Column	Description
Client Filter	Target clients: All, By Group, By Country, or With Unpaid Invoices
Next Run	Date and time of the next scheduled execution
Last Run	Date and time of the most recent execution
Status	Badge: Active (green) or Inactive (gray)
Actions	Action buttons (see below)

Actions Per Schedule

Button	Icon	Description
Edit	edit	Open the schedule editor to modify settings
Run Now	play	Execute the schedule immediately without waiting for the next scheduled time
Toggle	power-off	Enable or disable the schedule
Delete	trash	Delete the schedule (requires confirmation)

Creating a New Schedule

Click the **Add New** button at the top or go to **Schedules > Add Schedule** in the navigation menu.

See the [Schedule Editor](#) page for details on configuring a schedule.

Sending All Outstanding Unpaid Invoices

To configure a recurring schedule that automatically sends statements with **all unpaid invoices**

(regardless of the year the invoice was issued):

1. Click **Add New** (or edit an existing schedule).
2. In **General Settings**:
 - Enter a **Name** (e.g., `Weekly Outstanding Invoices Reminder`).
 - Select your desired **Frequency** (e.g., `Weekly` or `Monthly`).
 - Select **Period Type** as **All Unpaid Invoices** (or **All Time**).
3. In **Client Filter**:
 - Select **With Unpaid Invoices**. This ensures only clients with unpaid balances are selected.
4. In **Include Options**:
 - Check **Unpaid** only.
 - Uncheck **Paid**, **Refunded**, **Transactions**, and **Credits** so the statement focuses strictly on the unpaid balance and does not include historical paid items.
5. In **Output**:
 - Check **Send Email** (and optionally **Save to Archive**).
6. Click **Save Schedule**.

“ [!TIP] When using **All Unpaid Invoices**, the module inspects all invoices from `1970-01-01` to the current date, ensuring unpaid invoices from prior years (2025, 2026, 2027, etc.) are never missed. If a client has zero unpaid invoices, the module automatically skips them and does not send empty emails.

How Schedules Work

Schedules are executed by the WHMCS cron job. When a schedule's next run time is reached:

1. The module identifies matching clients based on the schedule's client filter
2. For each client, a statement is generated for the configured period
3. Depending on the schedule's output settings, statements are saved to archive and/or emailed to clients
4. The schedule's next run time is updated based on its frequency
5. Execution details are logged for reference

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