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Settings

PUQ Account Statement module **WHMCS**

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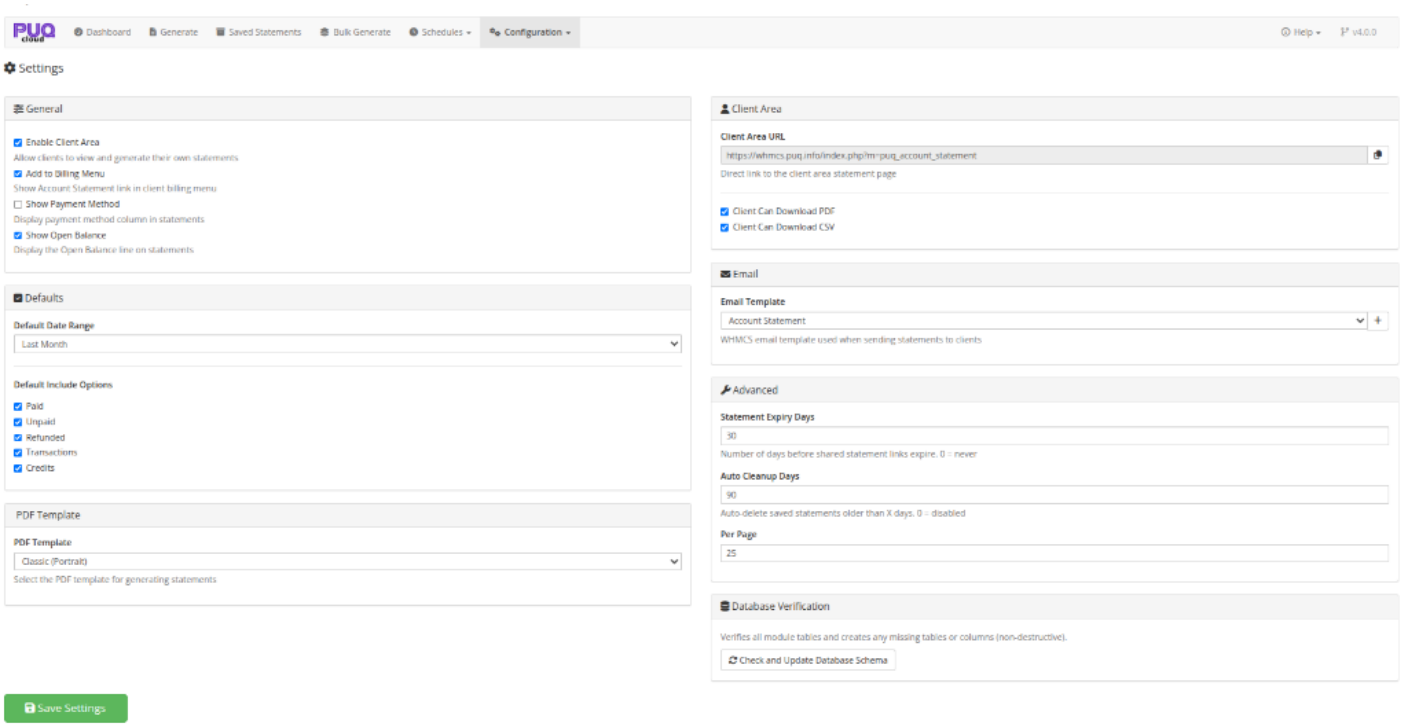
The Settings page is available at: **Addons** > **PUQ Account Statement** > **Configuration** > **Settings**

This page controls the module's global settings including client area access, defaults, PDF template selection, email configuration, and advanced options.



10-settings.png

General

Setting	Description
Enable Client Area	Allow clients to access the Account Statement page in the client area

Setting	Description
Add to Billing Menu	Show an "Account Statement" link in the client area billing navigation menu
Show Payment Method	Show the payment method / gateway column in statements (admin preview, PDF, and CSV). Disable to hide it everywhere
Show Open Balance	Show the Open Balance line on statements. Disable to show only the Account Credit and Closing (amount owed) figures

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Defaults

Default Date Range

Set the default date range preset that is used when a client opens the statement page:

Option	Period
This Month	First to last day of the current month
Last Month	First to last day of the previous month
This Quarter	First day of current quarter to today
Last Quarter	First to last day of the previous quarter
This Year	January 1 to December 31 of current year
Last Year	January 1 to December 31 of previous year

Default Include Options

Set which financial data types are included by default when generating statements:

- Paid
- Unpaid
- Refunded
- Transactions
- Credits

PDF Template

Setting	Description
PDF Template	Select the PDF layout template for generating statements. Available templates include Classic, Modern, Detailed — in Portrait or Landscape orientation

The dropdown is dynamically populated from template files in the `templates/pdf/` directory. Each option shows the template name and orientation.

Client Area

Setting	Description
Client Area URL	The direct link to the client area statement page (read-only, with copy button)
Client Can Download PDF	Allow clients to download PDF versions of their statements
Client Can Download CSV	Allow clients to download CSV versions of their statements

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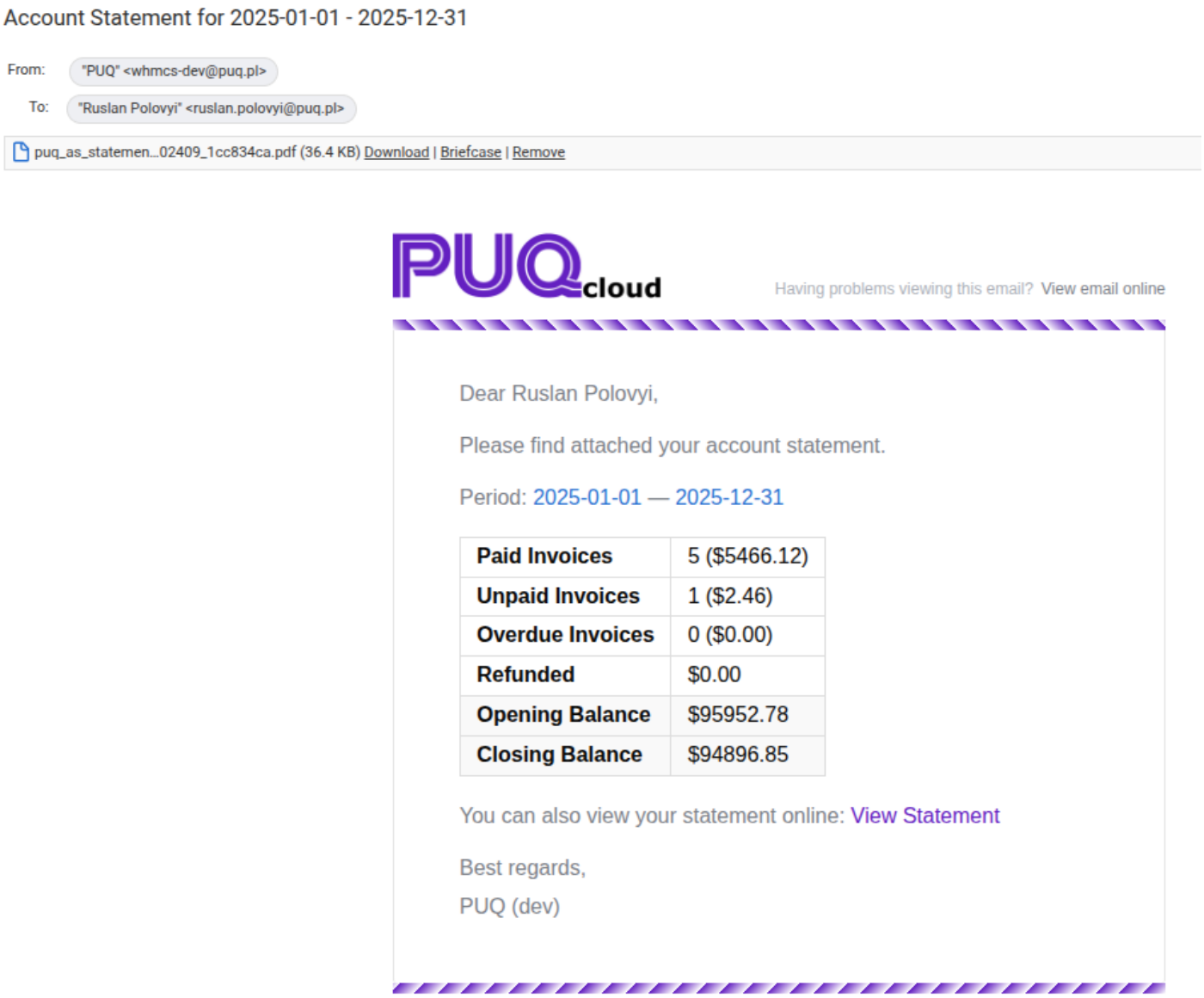
Email

Setting	Description
Email Template	Select which WHMCS email template to use when sending statements to clients
Create (+)	Click the + button to create the default "Account Statement" email template in WHMCS if it doesn't exist yet

The dropdown is populated with all available WHMCS General email templates.

Email Example

When a statement is sent to a client (manually, via bulk, or via schedule), they receive an email with a PDF attachment and a summary of the statement:



20-email-statement.png

The email includes:

- PDF statement as attachment
- Statement period
- Summary table with paid/unpaid invoices, credits, account credit, and the closing balance (amount owed)
- Link to view the statement online

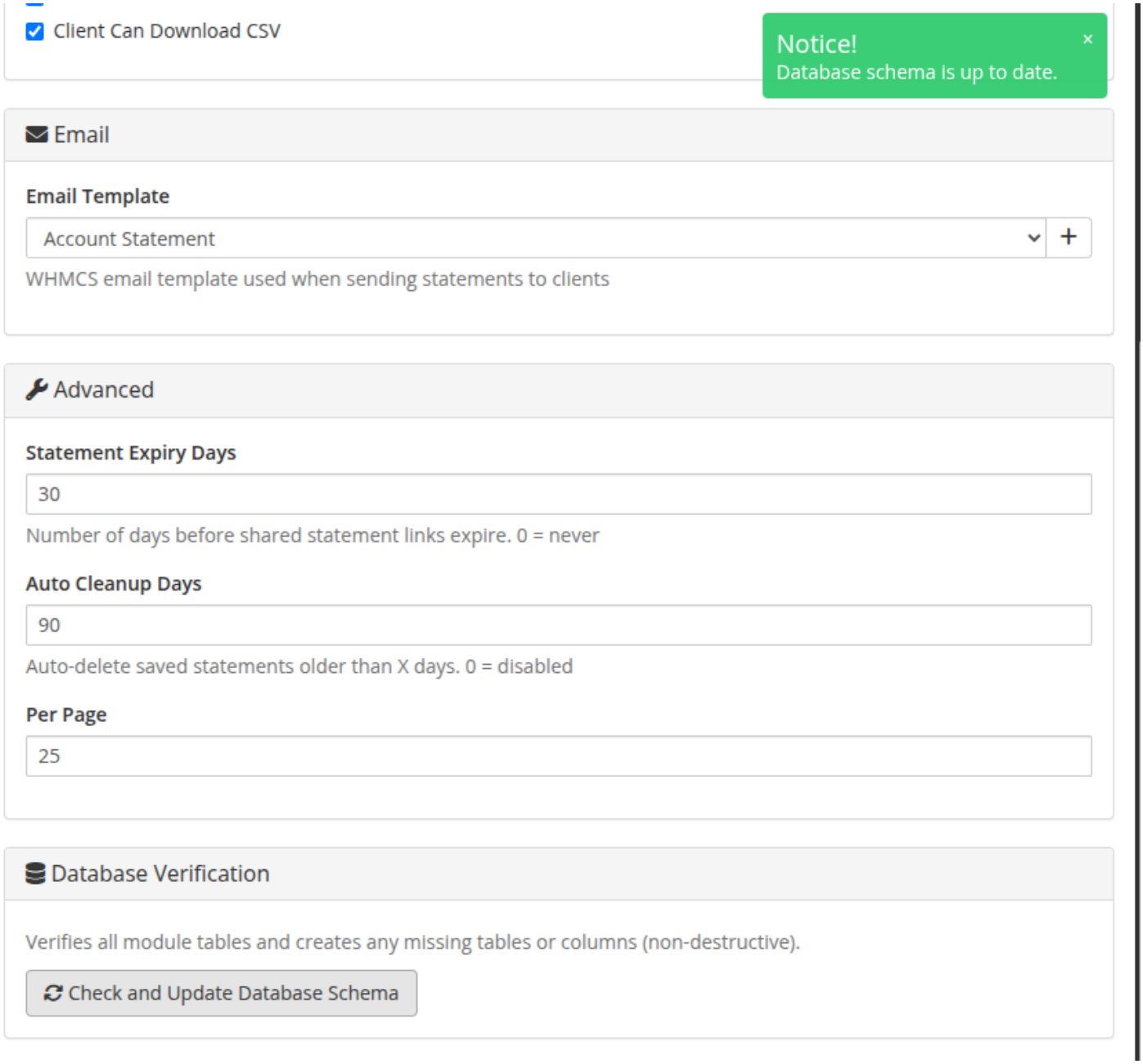
Advanced

Setting	Description
Statement Expiry Days	Number of days before shared statement links expire. Set to 0 for links that never expire (default: 30)

Setting	Description
Auto Cleanup Days	Automatically delete saved statements older than this many days. Set to 0 to disable auto-cleanup (default: 90)
Per Page	Number of records per page in statement lists (5–100, default: 25)

Database Verification

The module provides an automated database maintenance and verification tool.



24-database-verification.png

Action	Description
Check and Update Database Schema	Non-destructively inspects all module database tables (`puq_acc_st_settings`, `puq_acc_st_statements`, `puq_acc_st_schedules`, `puq_acc_st_templates`, `puq_license`) and automatically creates any missing tables or columns. Useful after upgrading module files to ensure new database columns are properly added without data loss.

Saving

Click **Save Settings** to save all configuration changes.

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