

Credit Management

Allows the customer to manage automatic apply credit.

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Description

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Credit Management

The "**Credit Management**" extension provides clients with the ability to manage automatic payments from their credit balance for invoices. In other words, clients can choose to enable or disable automatic payments using their credit balance and selectively utilize the credit for specific invoices. The key feature of this extension is that it offers this functionality on an individual client level, rather than applying it to all clients collectively as in the standard WHMCS configuration.

With this extension, administrators can enable or disable the automatic credit application for a particular client. The client area includes a widget and panel that allow clients to manage this option. The widget displays the client's credit balance, a button to add funds to the credit balance, and a toggle switch for automatic credit application.

It's important to note that by default, the global configuration has automatic credit application enabled for all registered users.

The extension provides a list of clients who have disabled the automatic credit application.

Additionally, the extension supports multilingual capabilities, ensuring that clients can access and utilize this feature in their preferred language.

The 'Credit Management' extension enhances the flexibility and control clients have over their credit balance and payment preferences, offering a personalized experience within the WHMCS system.

Configuration

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Home

Auto CC Management +

Cancel Fund Invoices +

Client Data Archive +

Clients Only Access +

Credit Management -

Configuration

Clients

Disabler of standard elements +

Export JPK +

GDPR Tools +

Head/Footer Output +

Maintenance Mode +

Menu Manager +

Overwrite Suspend/Termination +

Pages Manager +

Configuration

Credit Management

Enabled

YES

Enable or disable all custom functions.

Client area widget configuration

Widget type

Both

Amount

☒ Show Amount available for use in the widget

Add Funds

☒ Show Add Funds button in the widget

Auto apply credit switch

☒ Show Auto apply credit switch in the widget

Label auto apply credit

Auto apply credit

Default. If you leave empty it will show (Auto apply credit)

Show all languages

Save Changes

Enabled - Enabling or disabling all custom functions of this extension affects the automation and visibility of its features in the client area. When extension disabled, the automation capabilities and related features provided by the extension will not be active or visible to clients. However, as an administrator, you will still have access to configure and utilize the extension's functionalities through the administration interface. This gives you the flexibility to control the visibility and automation aspects of the extension based on your specific needs and preferences.

Widget type:

- Sidebar
- Homepage Panel
- Both

Amount:

- Checkbox: Show amount available for use in the widget

Add Funds:

- Checkbox: Show "Add Funds" button in the widget

Auto apply credit switch:

- Checkbox: Show "Auto apply credit" switch in the widget

Label for auto apply credit (Default. If left empty, it will show "Auto apply credit")

These configuration options allow you to customize the appearance and functionality of the client area widget for the 'Credit Management' extension. You can choose the widget type, whether to display the amount available for use, the option to add funds, and the switch for enabling or disabling auto application of credit. Additionally, you can provide a custom label for the auto apply credit switch.

Clients

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Home

Auto CC Management +

Cancel Fund Invoices +

Client Data Archive +

Clients Only Access +

Credit Management -


Configuration

Clients

Disabler of standard elements +

Forecasting +

Clients

Credit Management 

Clients who have the automatic apply credit disabled

Find by ...

Credit

Ruslan Polovyi - (TEST sp. z o. o.)95890.20 (USD)

Dmytro Kravchenko49761.10 EUR (EUR)

On the Clients page of the 'Credit Management' extension, there is a list of clients who have the auto apply credit option disabled. The table displays the following fields for each client:

- Client Name: The name of the client.
- Credit Balance: The current credit balance of the client.

This table allows you to easily view and manage clients who have chosen to disable the automatic credit application feature.

Switch in admin area

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Client Profile

The screenshot shows the 'Client Profile' page in WHMCS for a client named 'Ruslan Polovyi (TEST sp. z o. o.) - #1'. The page has a top navigation bar with tabs: Summary, Profile, Users, Contacts, Products/Services, Domains, Billable Items, Invoices, Quotes, Transactions, Tickets, Emails, Notes (0), and Log. The 'Summary' tab is active. Below the tabs, the client's name is displayed. To the right, there are status indicators: 'Exempt from Tax: No', 'Auto CC Processing: No', 'Send Overdue Reminders: Yes', and 'Apply Late Fees: Yes'. The main content area is divided into three columns. The first column contains a list of services. The second column contains a list of invoices. The third column contains a list of tickets. On the right side of the main content area, there is a section titled 'Other Actions' which includes a toggle switch for 'Disable auto apply credit'. The current status is 'NOW: Credits applied automatically'.

To enable the administrator to manage the toggling of automatic credit application for a client, there is a position in the "Other Actions" menu on the client's summary tab. From there, it is possible to individually enable or disable credit application for that specific client.

This feature provides convenient access for administrators to modify the auto apply credit setting on a per-client basis, allowing them to customize the credit management experience for each client as needed.

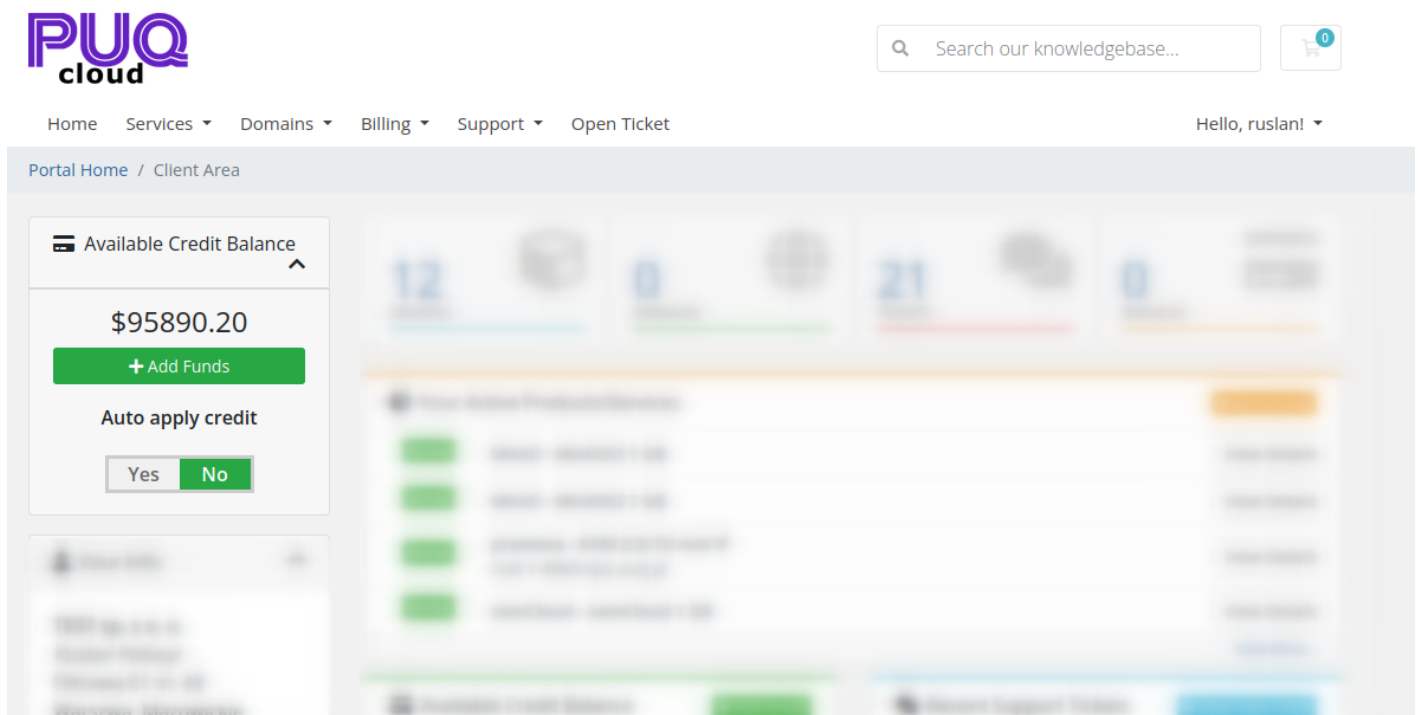
Client Area Widget

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The Client Area Widget consists of two widgets that display the following information:

Slider Widget: This widget is designed as a slider and is located on the side. It includes the client's credit balance, a button to add funds to the credit balance, and a toggle switch for automatic credit application. The slider widget provides a convenient and accessible way for clients to view their credit balance and manage automatic credit application.



Dashboard Panel Widget: This widget is placed on the client's dashboard and is visible only on the dashboard. Similar to the slider widget, it displays the client's credit balance, a button to add funds, and a toggle switch for automatic credit application. The dashboard panel widget provides an alternative location for clients to access their credit-related information and settings directly from their dashboard.

The screenshot displays the PUQ cloud client area dashboard. At the top, there's a navigation bar with links to Home, Services, Domains, Billing, Support, and Open Ticket. A search bar and a shopping cart icon are also present. The main content area is titled 'Portal Home / Client Area'. It features a sidebar on the left with a 'Available Credit Balance' widget showing '\$95890.20' and an 'Auto apply credit' toggle set to 'Yes'. The main panel shows a 'Your Active Products/Services' table with columns for status, name, and actions. A modal window is open in the center, displaying the 'Available Credit Balance' as '\$95890.20' and the 'Auto apply credit' toggle, which is currently set to 'No'. The background is slightly blurred to emphasize the modal.

Both widgets offer a user-friendly interface that allows clients to monitor and control their credit balance, add funds when needed, and enable or disable automatic credit application according to their preferences.