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Credit Management

Allows the customer to manage automatic apply credit.

Description

PUQ Customization module **WHMCS**

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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.

Ehe 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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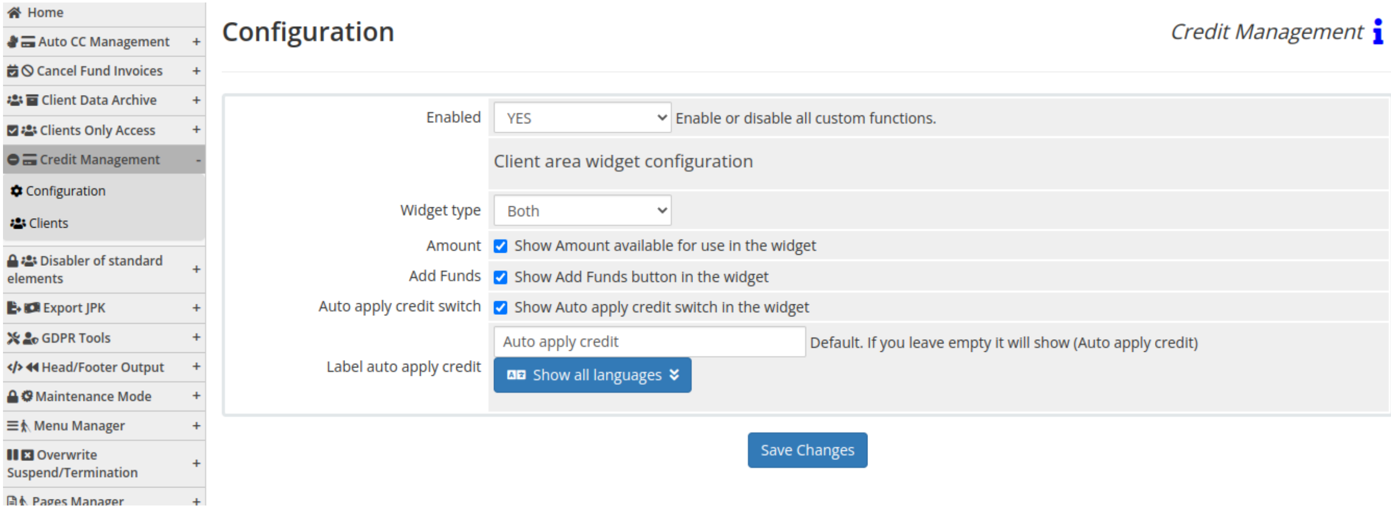

Enabled - Enabling or disabling all custom functions of this extension affects the automation and visibility of its features in the client area. When extension disabled, the automation capabilities and related features provided by the extension will not be active or visible to clients. However, as an 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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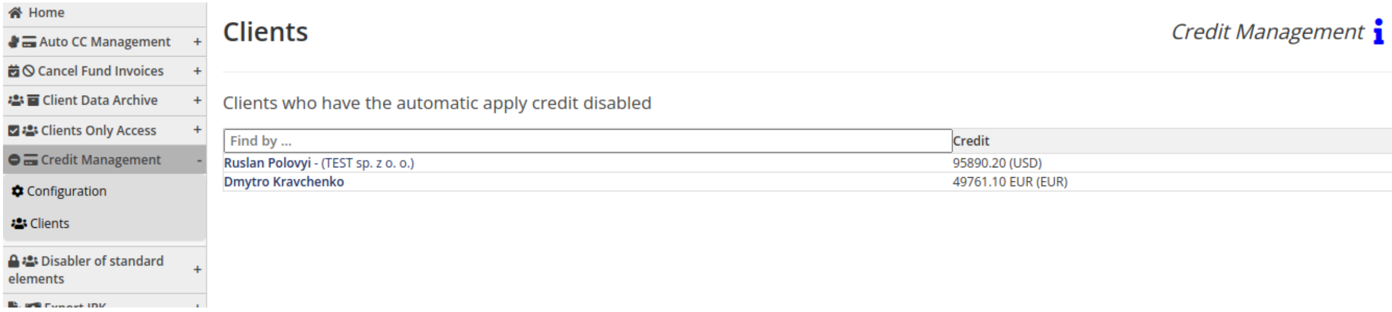

On the Clients page of the 'Credit Management' extension, there is a list of clients who have the auto apply credit option disabled. The table displays the following fields for each client:

- 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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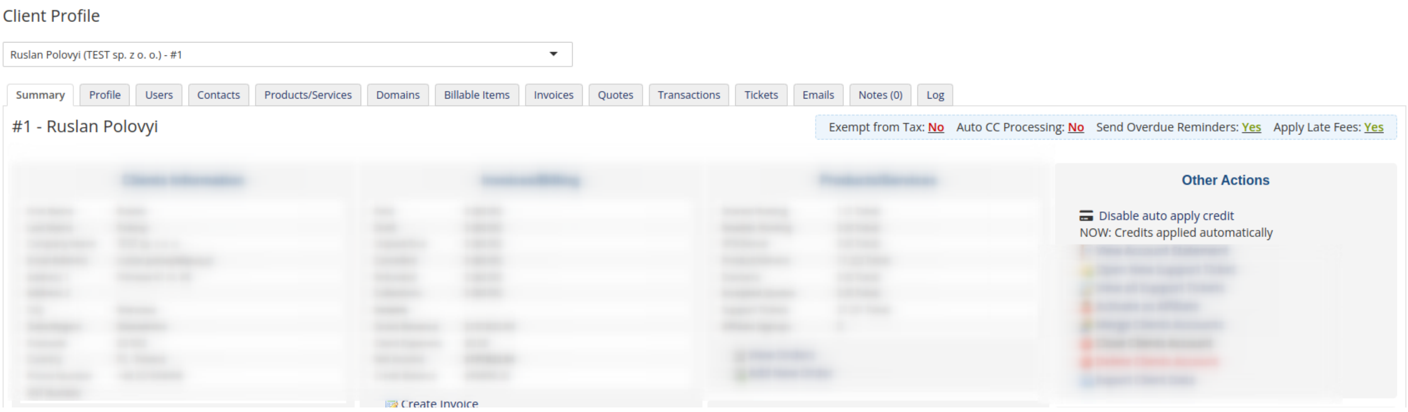

To enable the administrator to manage the toggling of automatic credit application for a client, there is a position in the "Other Actions" menu on the client's summary tab. From there, it is possible to individually enable or disable credit application for that specific client.

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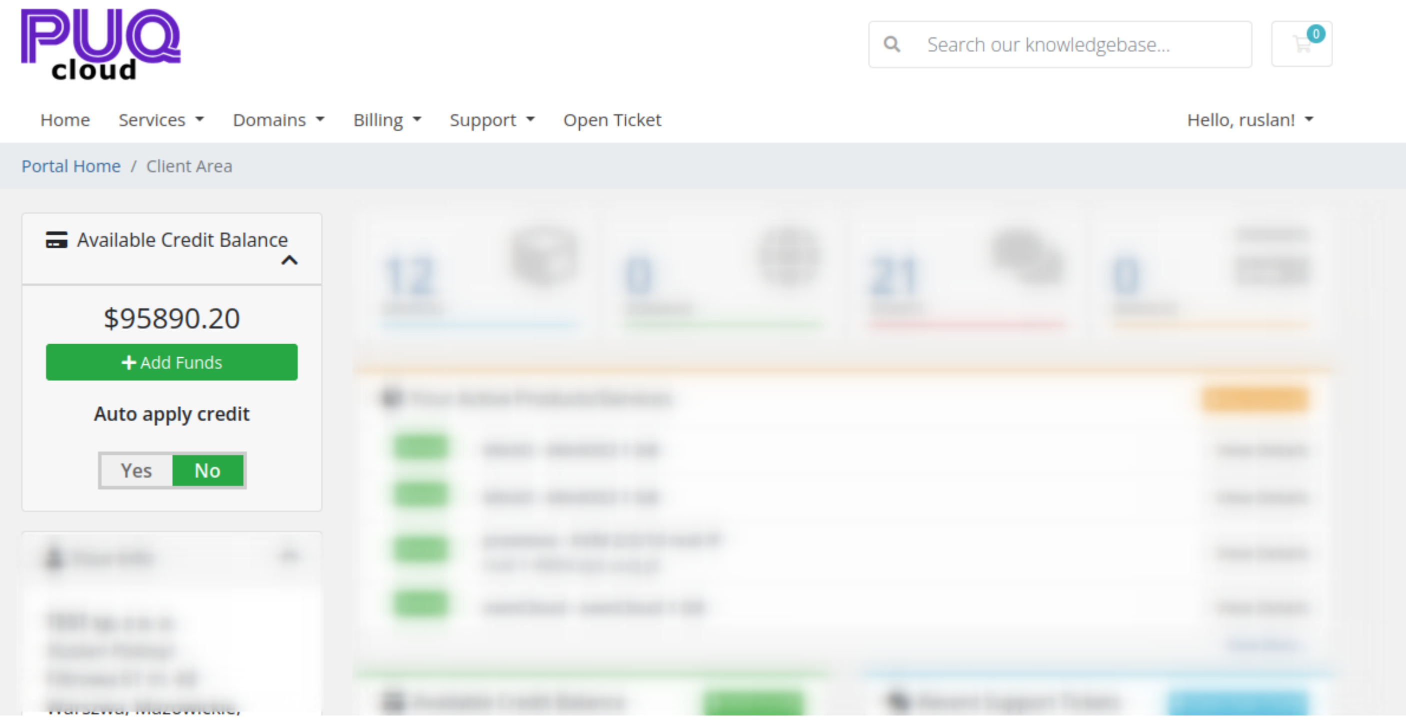
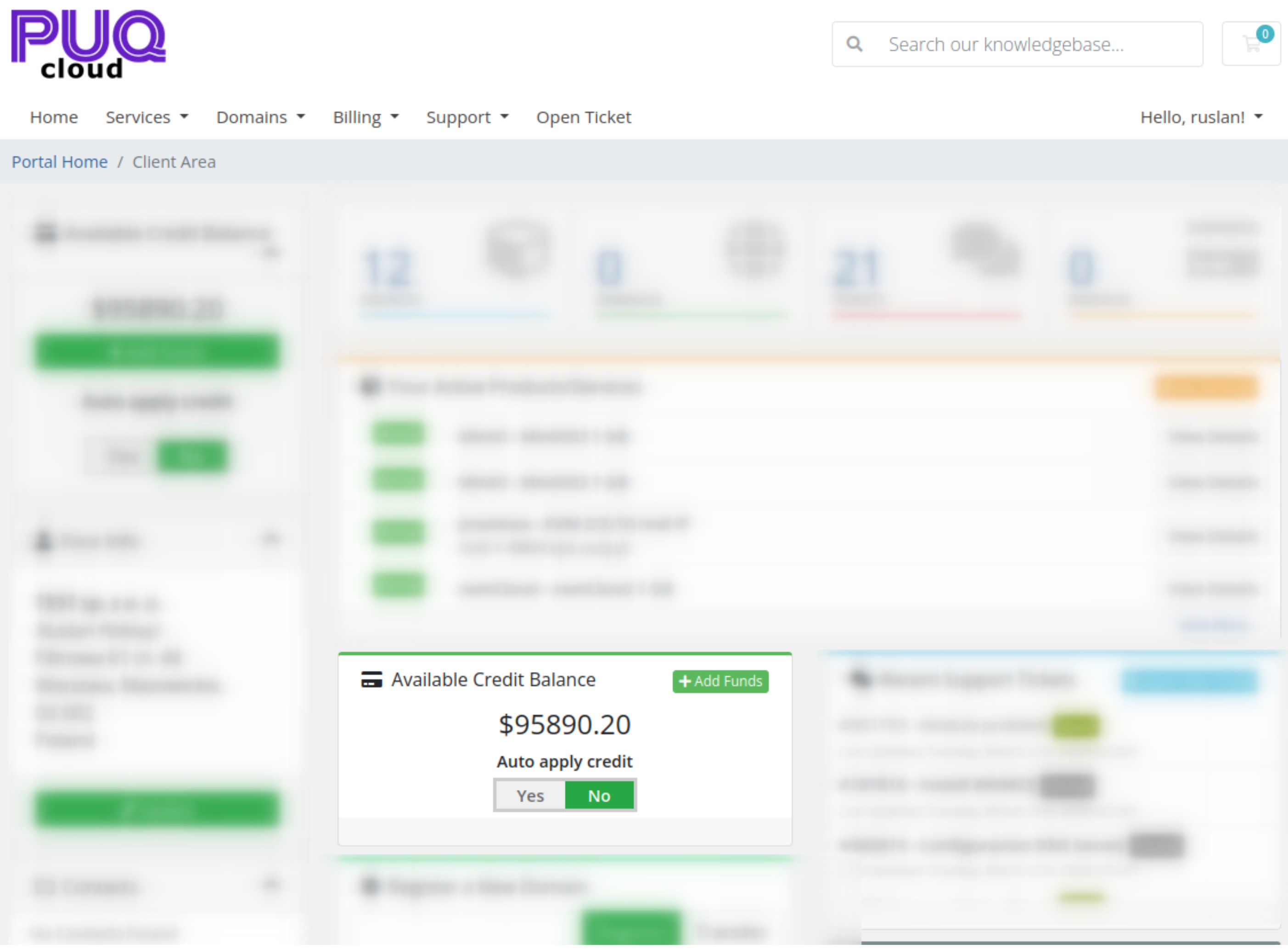
The Client Area Widget consists of two widgets that display the following information:

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.



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.