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Prorated Next Due Date

Allows you to synchronize the date of the next payment for all customer services. Also from the customer's zone.

- Description
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- Client Area

Description

PUQ Customization module **WHMCS**

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Prorated Next Due Date

The "Prorated Next Due Date" extension provides the ability for both administrators and clients to align their payment cycles to a specific day of the month.

This extension is designed for mass alignment of service payments to a designated day of the month for a particular client. It also empowers clients to independently perform such alignment.

The configuration of the extension includes the following parameters:

- Button on client area: Adds a button to the client area, allowing clients to agree on the payment due date for their services.
- Prorata Date: The day of the month to align the service payment to.
- Prorate monthly: Enables alignment of products with a monthly billing cycle.
- Prorate quarterly: Enables alignment of products with a quarterly billing cycle.
- Prorate semi-annual: Enables alignment of products with a semi-annual billing cycle.
- Prorate annual: Enables alignment of products with an annual billing cycle.
- Prorate biennial: Enables alignment of products with a biennial billing cycle.
- Prorate triennial: Enables alignment of products with a triennial billing cycle.
- Calculate days by date of use: To calculate the proportion for invoicing, the number of days in the billing period needs to be known. If this parameter is set, the number of days for billing periods will be automatically calculated at the time of functionality usage.
- Days month: The number of days in a month.
- Days quarter: The number of days in a quarter.
- Days half year: The number of days in a half-year.
- Days year: The number of days in a year.
- Days two year: The number of days in two years.
- Days three year: The number of days in three years.

The mechanism of proration works as follows:

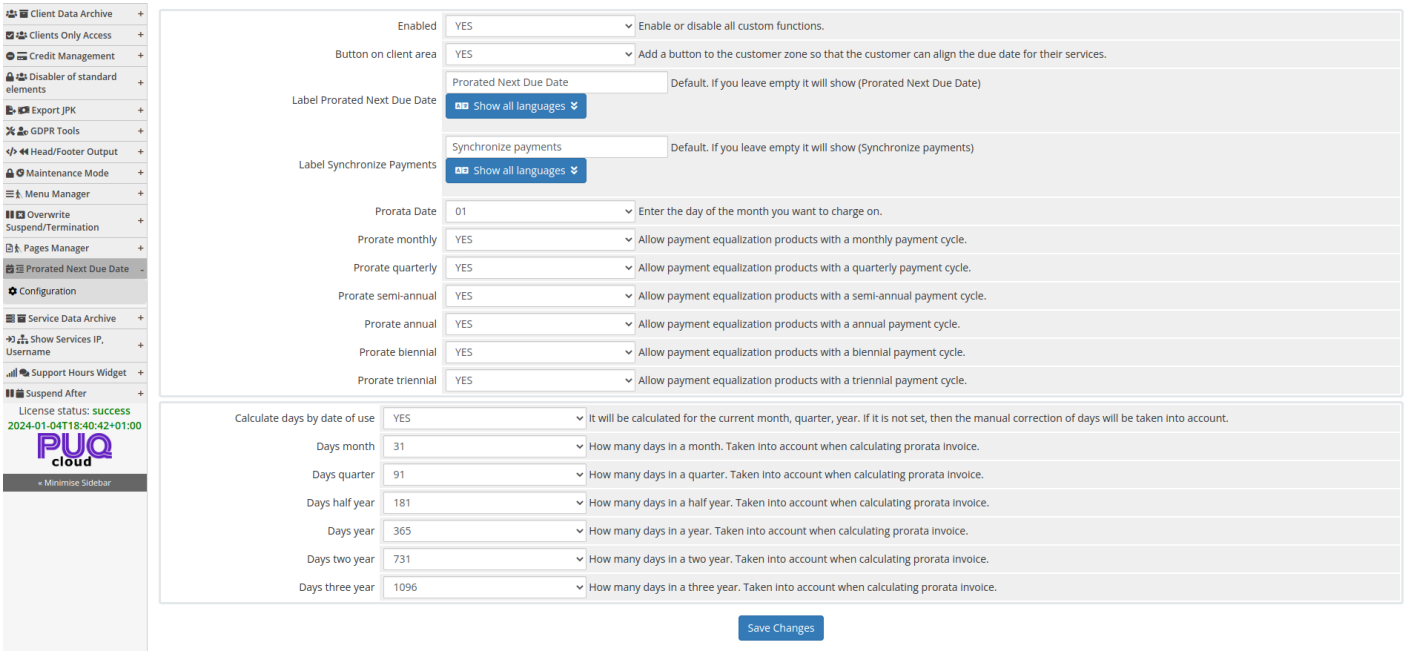
1. It allows alignment for all services with different billing cycles.
2. Alignment can be done for services with specific billing cycles.
3. Only active and suspended services are eligible for alignment.
4. If the Next Due Date matches the Prorata Date, the service does not participate in the alignment.
5. Services with Next Due Date in the past are aligned to the nearest future Prorata Date (relative to the date of usage).
6. Services with Next Due Date in the future are aligned to the nearest future Prorata Date from the Next Due Date.
7. Proration invoices are created based on the service payment method (each payment method has its own invoice with proration items).
8. If there is an unpaid position for a service in an invoice, the position will be removed, and the invoice will be adjusted.
9. After invoice adjustment, if the invoice has no positions, it will be deleted.
10. After alignment, a proforma proration invoice is generated.
11. Importantly, the Next Due Date will only change after payment of the proforma proration invoice.

The module also includes a widget for the client area, allowing clients to manage the alignment of their payment dates independently.

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.

On the settings page, you can configure the following parameters:

Button on client area: This option allows you to add a button to the customer zone, enabling customers to align the due date for their services.

Prorata Date: Enter the day of the month on which you want to charge for the services.

Prorate monthly: If set to "YES," it enables payment equalization for products with a monthly payment cycle.

Prorate quarterly: If set to "YES," it enables payment equalization for products with a quarterly

payment cycle.

Prorate semi-annual: If set to "YES," it enables payment equalization for products with a semi-annual payment cycle.

Prorate annual: If set to "YES," it enables payment equalization for products with an annual payment cycle.

Prorate biennial: If set to "YES," it enables payment equalization for products with a biennial payment cycle.

Prorate triennial: If set to "YES," it enables payment equalization for products with a triennial payment cycle.

Calculate days by date of use: If set to "YES," the system will automatically calculate the number of days for the current month, quarter, and year. If not set, manual correction of days will be considered.

Days month: Specify the number of days in a month. This value is taken into account when calculating prorata invoices.

Days quarter: Specify the number of days in a quarter. This value is taken into account when calculating prorata invoices.

Days half year: Specify the number of days in a half-year. This value is taken into account when calculating prorata invoices.

Days year: Specify the number of days in a year. This value is taken into account when calculating prorata invoices.

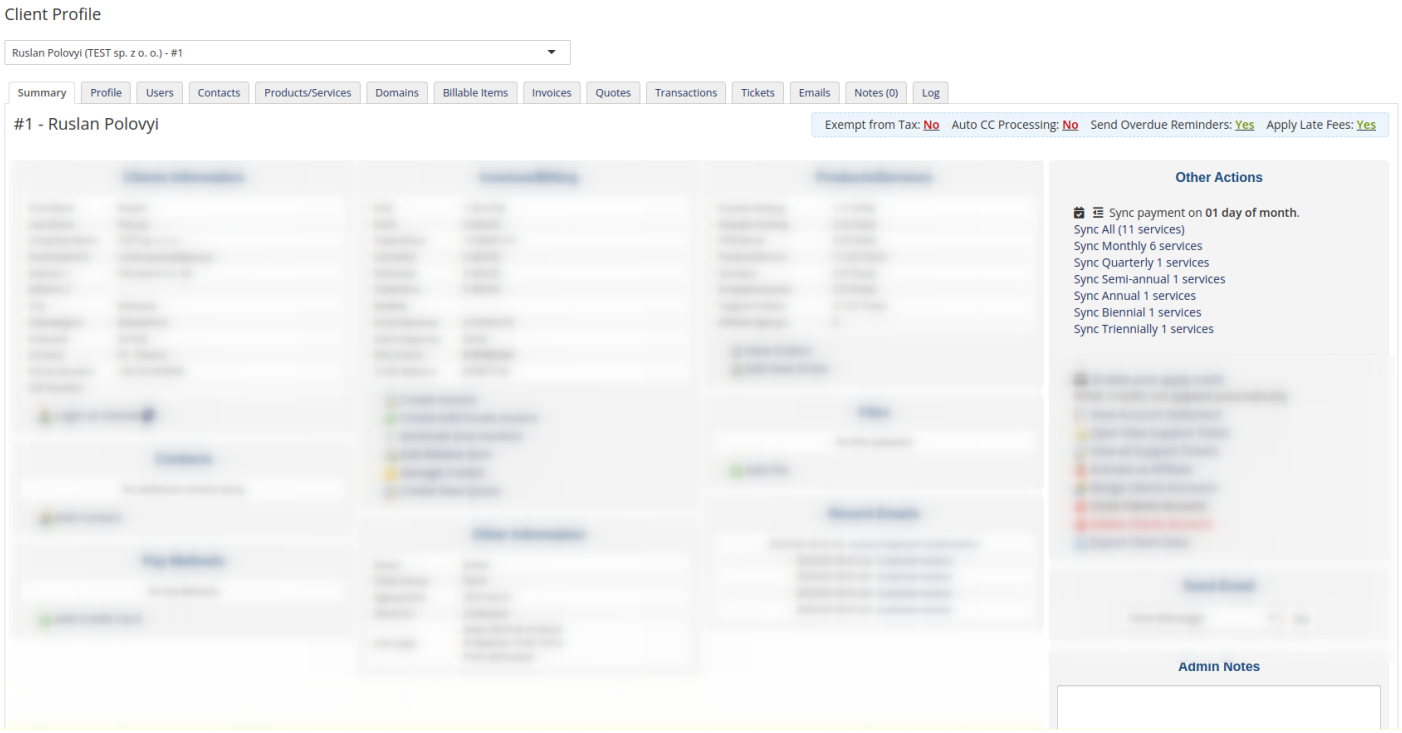
Days two year: Specify the number of days in two years. This value is taken into account when calculating prorata invoices.

Days three year: Specify the number of days in three years. This value is taken into account when calculating prorata invoices.

Admin Area

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In the admin area of WHMCS, on the customer profiles, under the "Summary" tab, there is a section called "Other Actions" that provides a menu for administrators to synchronize the payment of all or selected services to a specific date.

The menu looks like this:

- Sync payment on 01 day of the month.
- Sync All (11 services)
- Sync Monthly (6 services)
- Sync Quarterly (1 service)
- Sync Semi-annual (1 service)
- Sync Annual (1 service)
- Sync Biennial (1 service)
- Sync Triennially (1 service)

By selecting the desired option from the menu, the extension will perform proration and generate

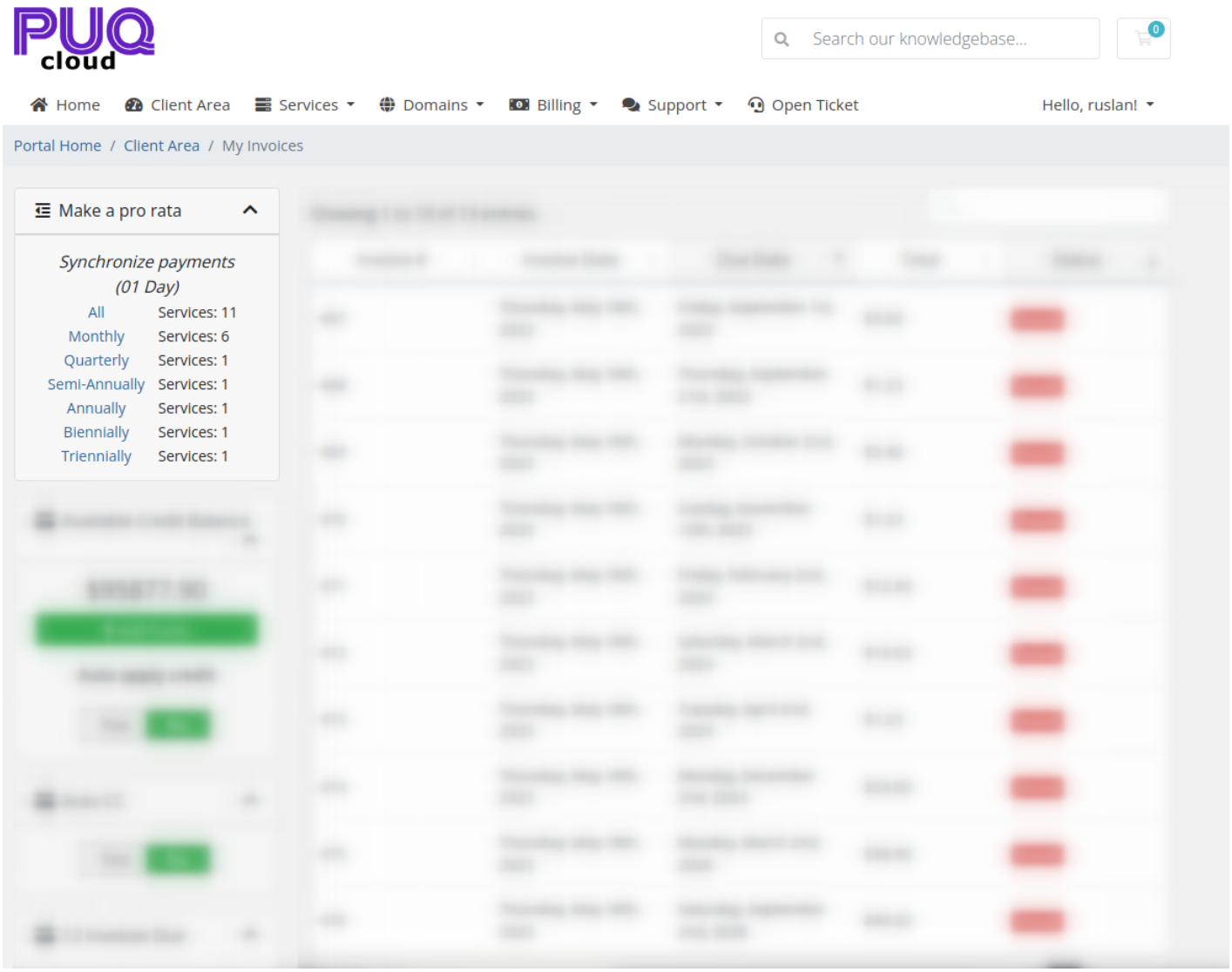
a proration invoice for the specified services.

This feature allows administrators to easily synchronize the payment cycles of services according to the chosen date, ensuring consistent billing and streamlining the management of customer accounts.

Client Area

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In the customer portal, there is a widget that allows clients to align the payment cycles of their services. It appears as a menu with the following options:

Synchronize payments (01 Day)

- All Services: 11
- Monthly Services: 6
- Quarterly Services: 1
- Semi-Annually Services: 1
- Annually Services: 1
- Biennially Services: 1
- Triennially Services: 1

When a client clicks on a specific option, the system will synchronize the payment cycles to the chosen day of the month. It will generate a proration invoice, and once the invoice is paid, all services will be set to the same due date.

This widget provides clients with a convenient way to manage and align the payment cycles of their services, ensuring easier financial planning and consistency in billing. By selecting the desired option, clients can streamline their payment schedules and simplify the management of their services.



Address goes here...

Proforma Invoice #479

Invoice Date: Thursday, May 18th, 2023

Due Date: Tuesday, May 23rd, 2023

Invoiced To
TEST sp. z o. o.
ATTN: Ruslan Polovyi
Filtrowa 61 m. 48
Warszwa, Mazowickie, 02-502
Poland

Description	Total
Synology 1 GB (2023-11-02 - 2023-12-01) Username: syno-1-4731-logy	$0.00
Shared Hosting 5 Gb (2023-11-02 - 2023-12-01) Username: serv1_lbvs_1_4811	$9.35
WireGuard Business-VPN 10 (77.87.125.200) (2023-06-02 - 2023-07-01) Username: 1-4847	$1.87
MinIOS3 1 GB (2023-10-02 - 2023-11-01) Username: 333-1-4854-777	$9.68
ownCloud 20 (2023-11-02 - 2023-12-01) Username: own-1-4855-Cloud	$0.94
KVM 2/2/10 real IP (77.87.125.225) (2023-12-02 - 2024-01-01) Username: root	$0.97
MinIOS3 1 GB (2023-12-02 - 2024-01-01) Username: 333-1-4881-777	$6.59
MinIOS3 1 GB (2024-03-02 - 2024-04-01) Username: 333-1-4882-777	$4.97
MinIOS3 1 GB (2024-09-02 - 2024-10-01) Username: 333-1-4883-777	$3.18
MinIOS3 1 GB (2025-09-02 - 2025-10-01) Username: 333-1-4884-777	$1.98
MinIOS3 1 GB (2026-09-02 - 2026-10-01) Username: 333-1-4885-777	$1.59
Sub Total	**$41.12**
23.00% VAT	**$9.46**
Credit	**$0.00**
Total	**$50.58**