Create and manage Clients

PUQcloud Panel

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Overview

This guide shows administrators how to create new clients and manage existing ones in **PUQcloud Panel**. You'll learn where to find client records, how to add a client, attach users and addresses, and how to handle services, invoices, and transactions.

Key Features

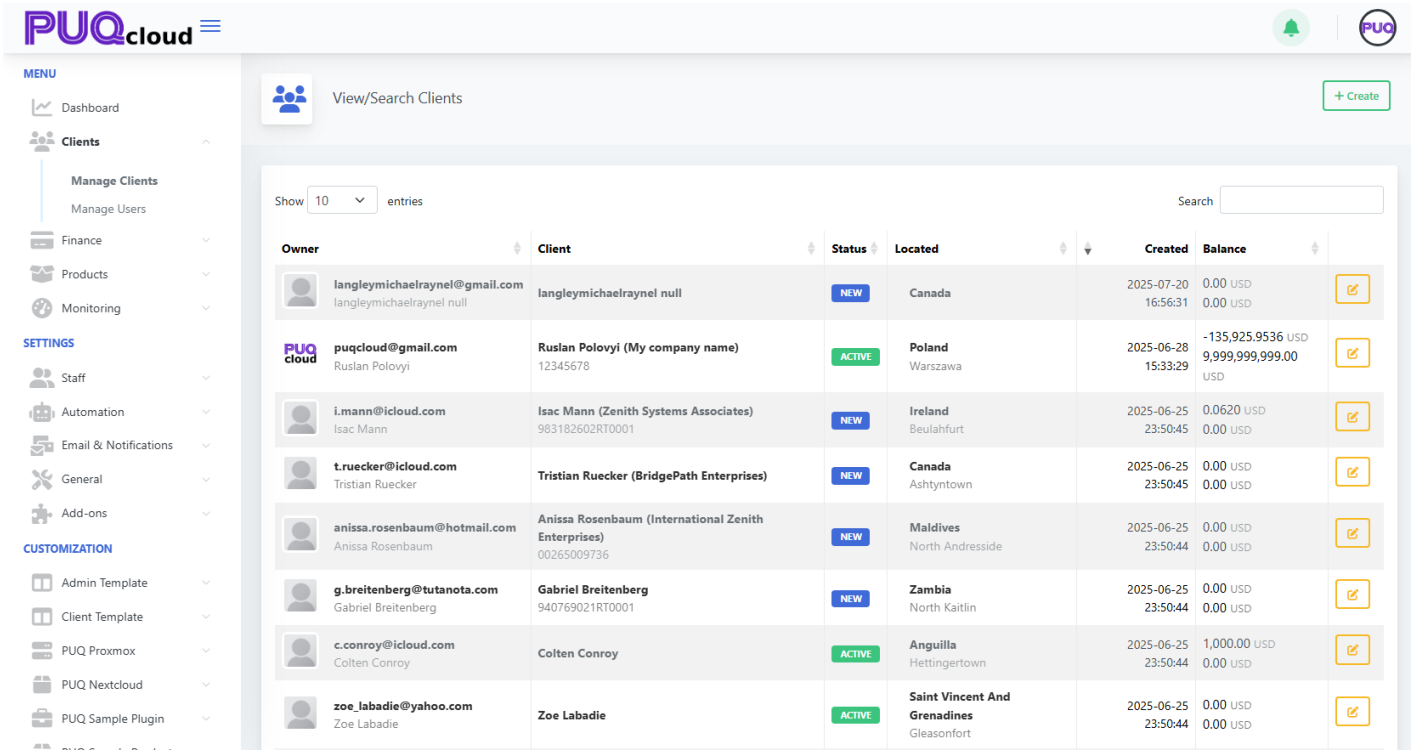
- Centralized **client directory** with search, sort, and status badges.
- Full **client profile**: personal/company info, language, currency, tax ID, credit limit, admin notes.
- **Addresses management**: billing/shipping, multiple entries, default flags.
- **Users & permissions**: associate users to the client and grant granular rights.
- **Services lifecycle**: add, view status (ACTIVE/COMPLETED/ERROR), open product actions.
- **Finance tools**: create invoices and manual transactions for charges/credits.

Before You Begin

- You must be logged in as an administrator.
- Ensure you know your **home company** tax settings and available **products & prices**.

Navigation

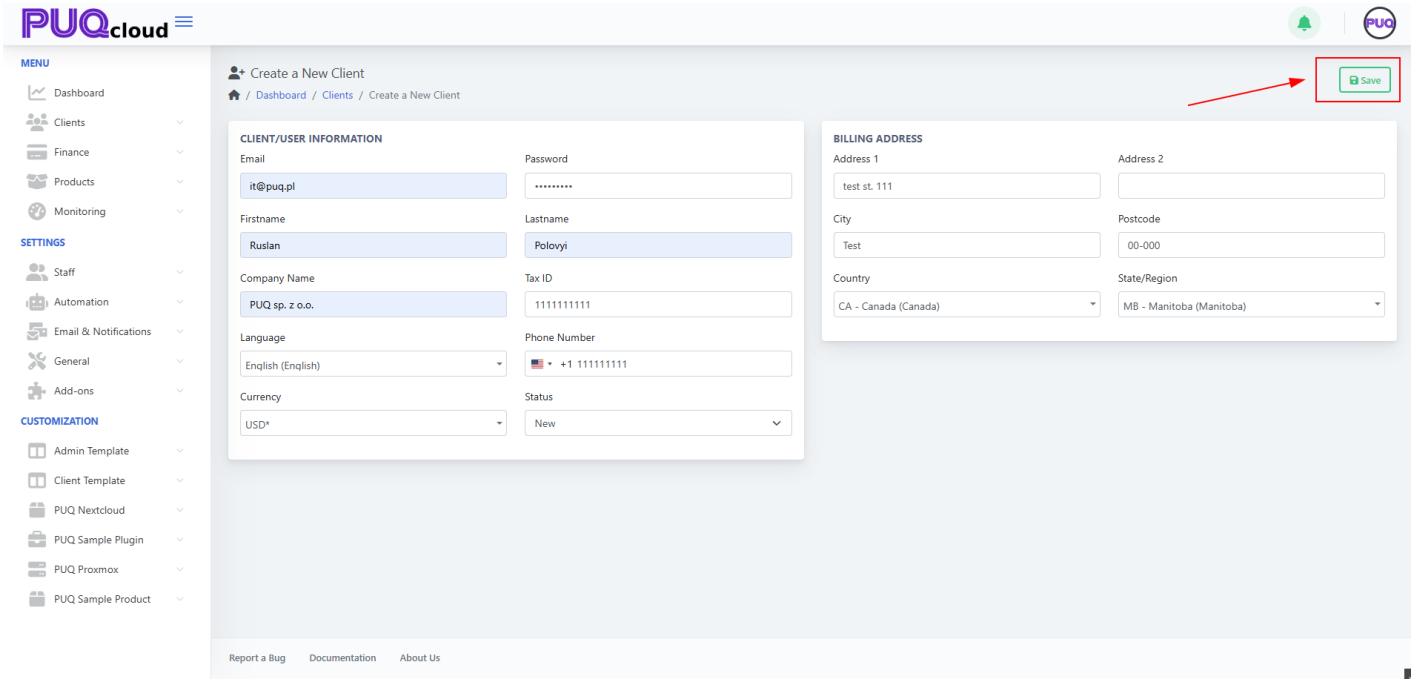
Menu → Clients → Manage Clients opens the client directory with columns for Owner, Client, Status, Located, Created, and Balance.
(*screenshot: View/Search Clients list*)



Create a New Client

1. Click **+ Create** (top-right on the client list).
2. Fill the **Client/User Information** fields:
   - **Email** and **Password**
   - **Firstname**, **Lastname**
   - **Company Name** (optional for individuals)
   - **Tax ID** (if applicable)
   - **Phone Number** (with country code)
   - **Language**, **Currency**
   - **Status** (New/Active/etc.)
3. Fill the **Billing Address**: **Address 1/2**, **City**, **Postcode**, **Country**, **State/Region**.
4. Click **Save**.

(screenshot: Create a New Client form)



Tips

- **Language** affects the UI for the client's users.
- **Currency** determines invoice currency defaults.
- Use an accurate **Tax ID** (e.g., GST/HST/QST/VAT formats) for correct tax handling.

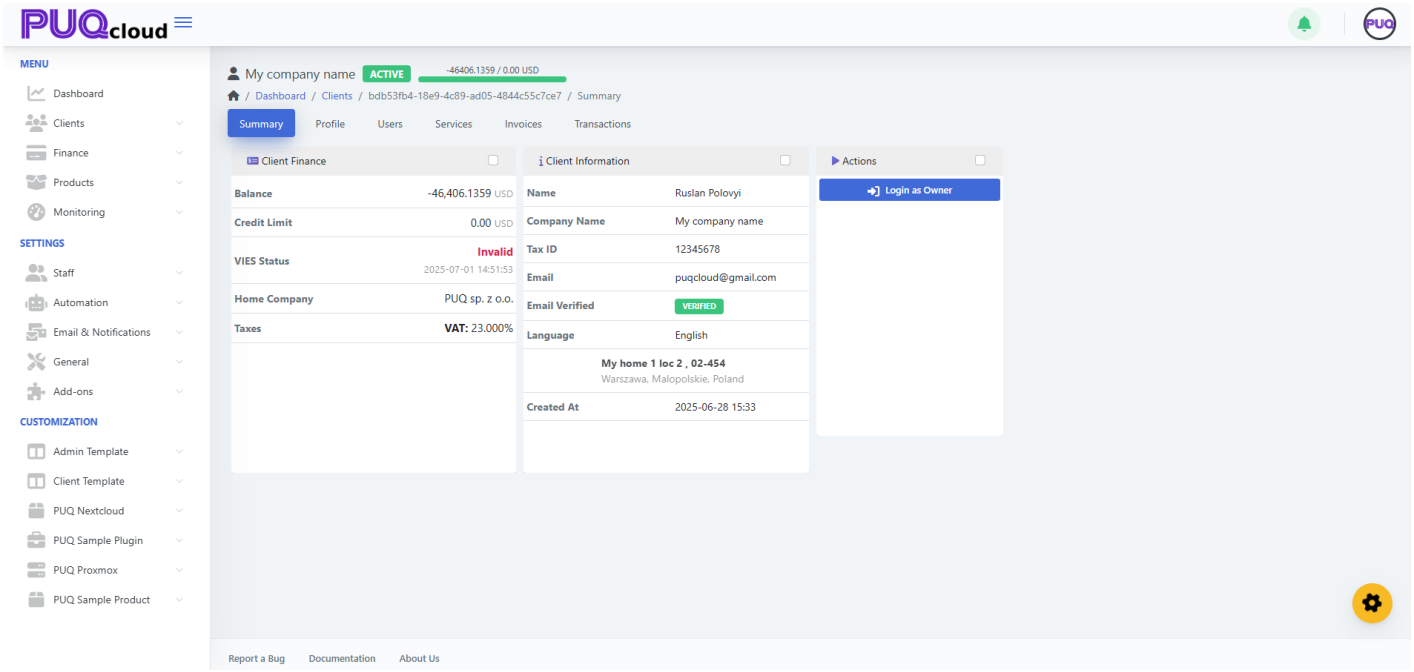
Client Record – Tabs & What They Do

After saving, you'll land on the client's page with these tabs: **Summary, Profile, Users, Services, Invoices, Transactions**.

Summary

- Quick view of **Client Finance** (Balance, Credit Limit, VIES/Tax status) and **Client Information** (name, company, email, language, main address, created at).
- **Actions** card: **Login as Owner**.

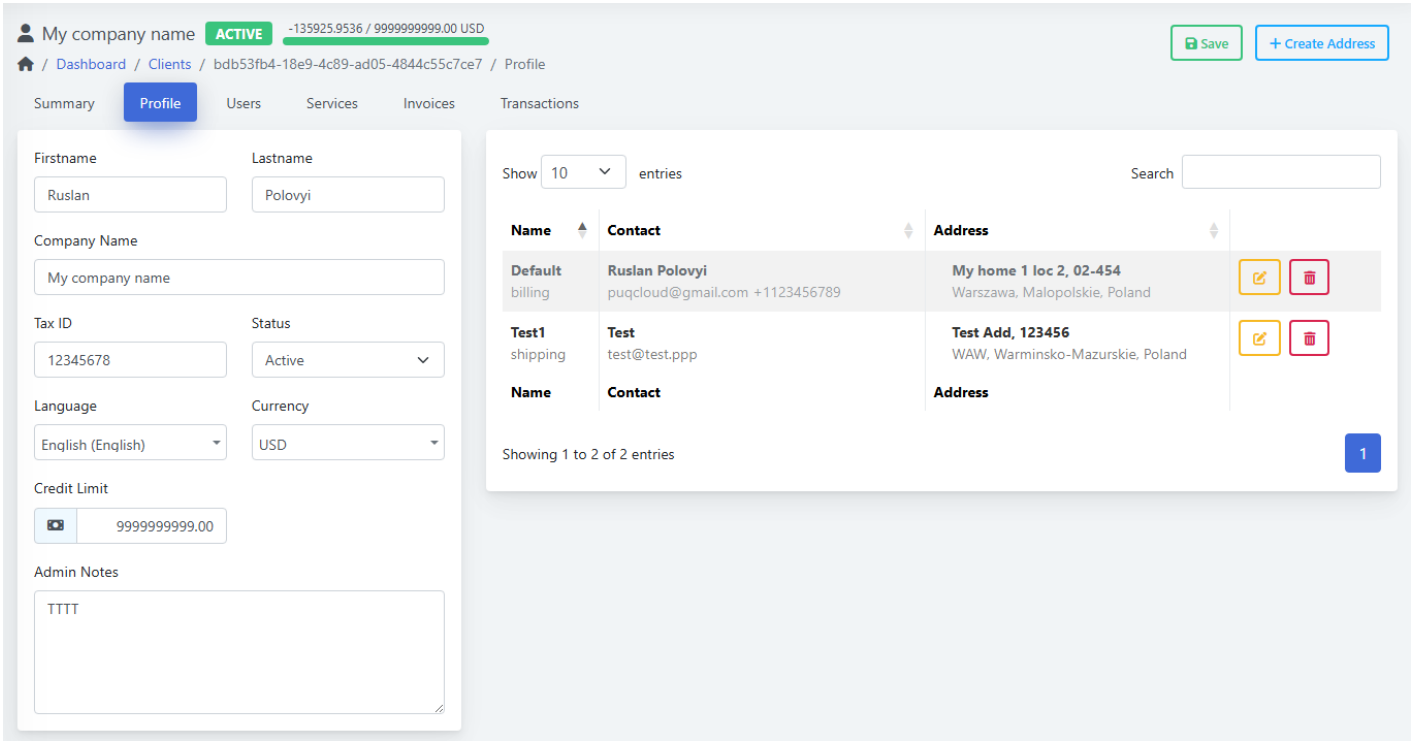
screenshot: Client → Summary tab



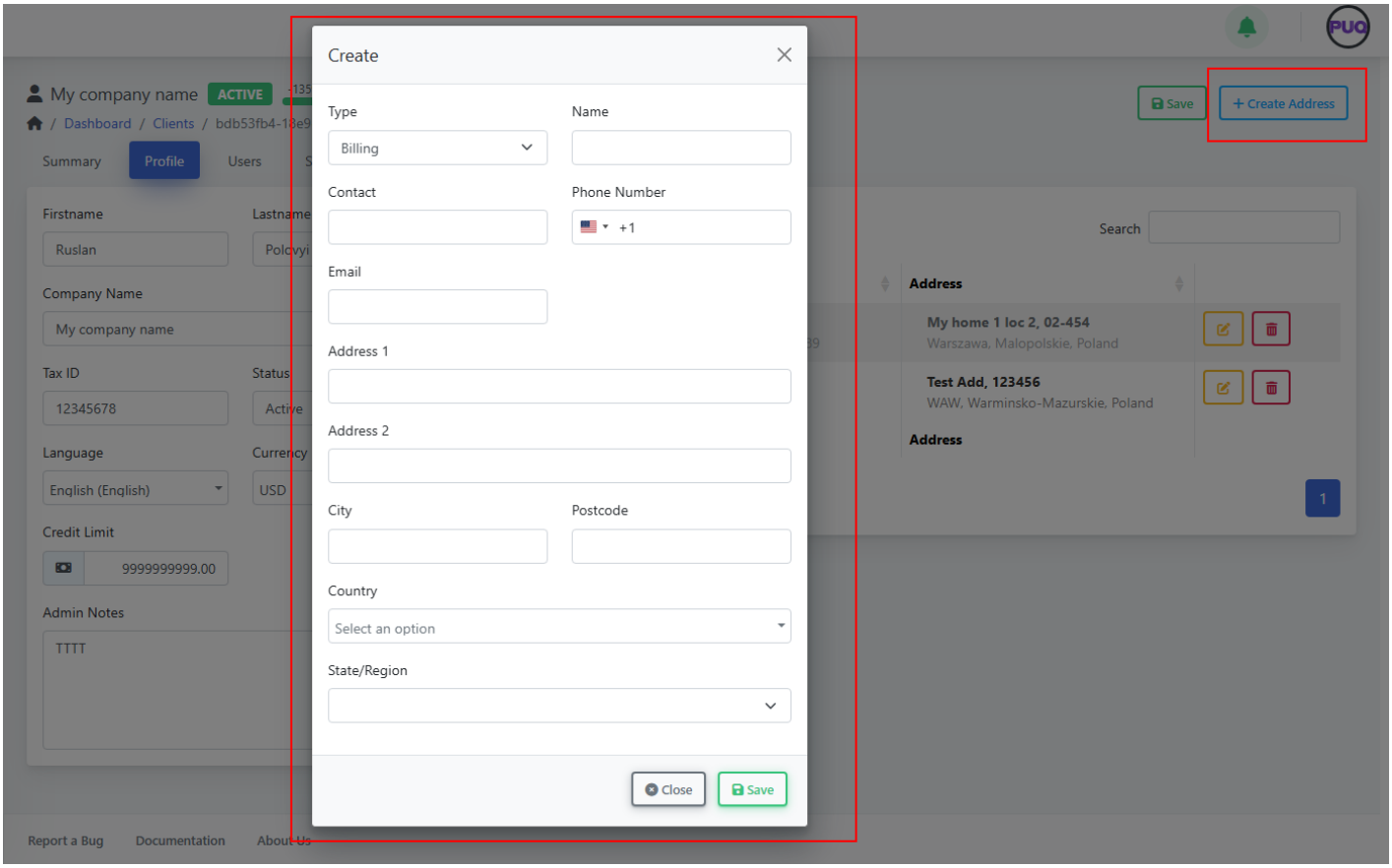
Profile

- Update **Firstname/Lastname**, **Company**, **Tax ID**, **Status**, **Language**, **Currency**, **Credit Limit**, **Admin Notes**.
- Right side shows the **Addresses** table with labels like **Default (billing)** or **shipping**; use the yellow **Edit** and red **Delete** buttons.
- Click **+ Create Address** to add a new address.

(screenshot: Client → Profile tab)



(screenshot: Create Address modal (Type, Name, Contact, Phone, Email, Address, Country, State/Region))



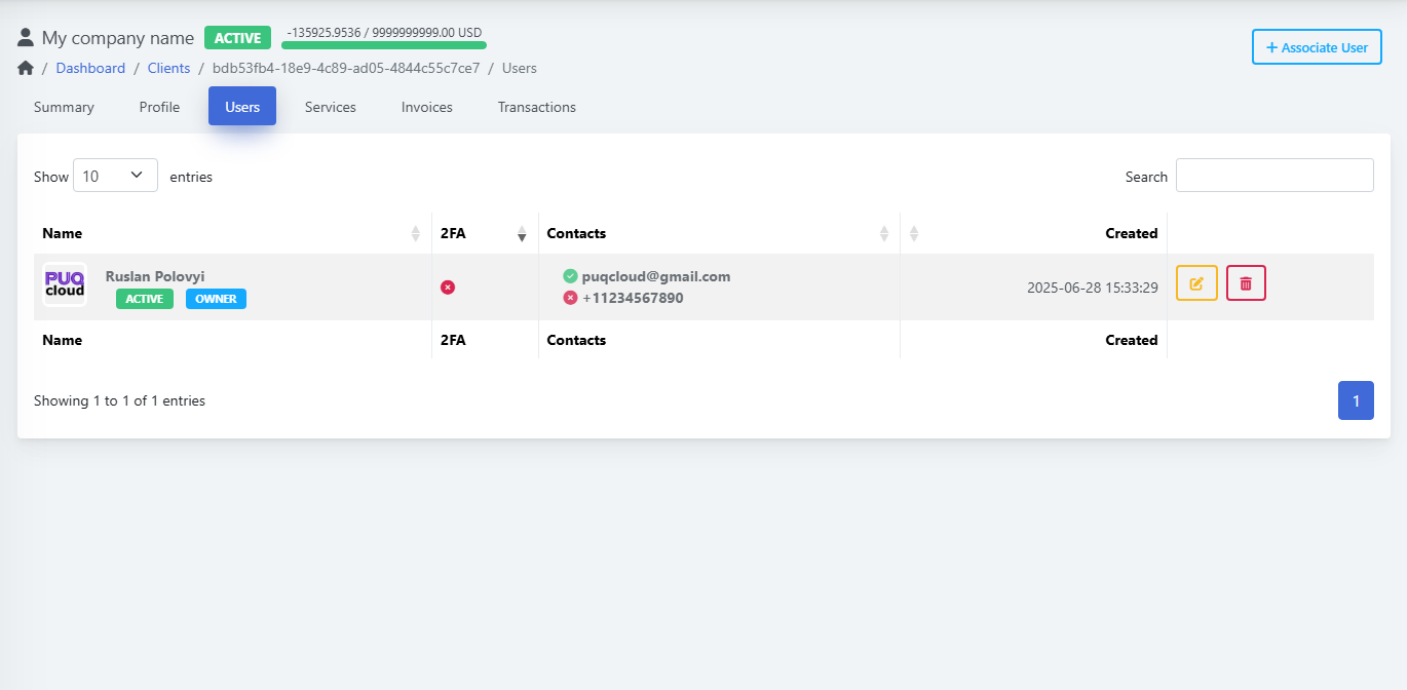
Address Types

- Billing (used on invoices)
- Shipping (for service deliveries/records)

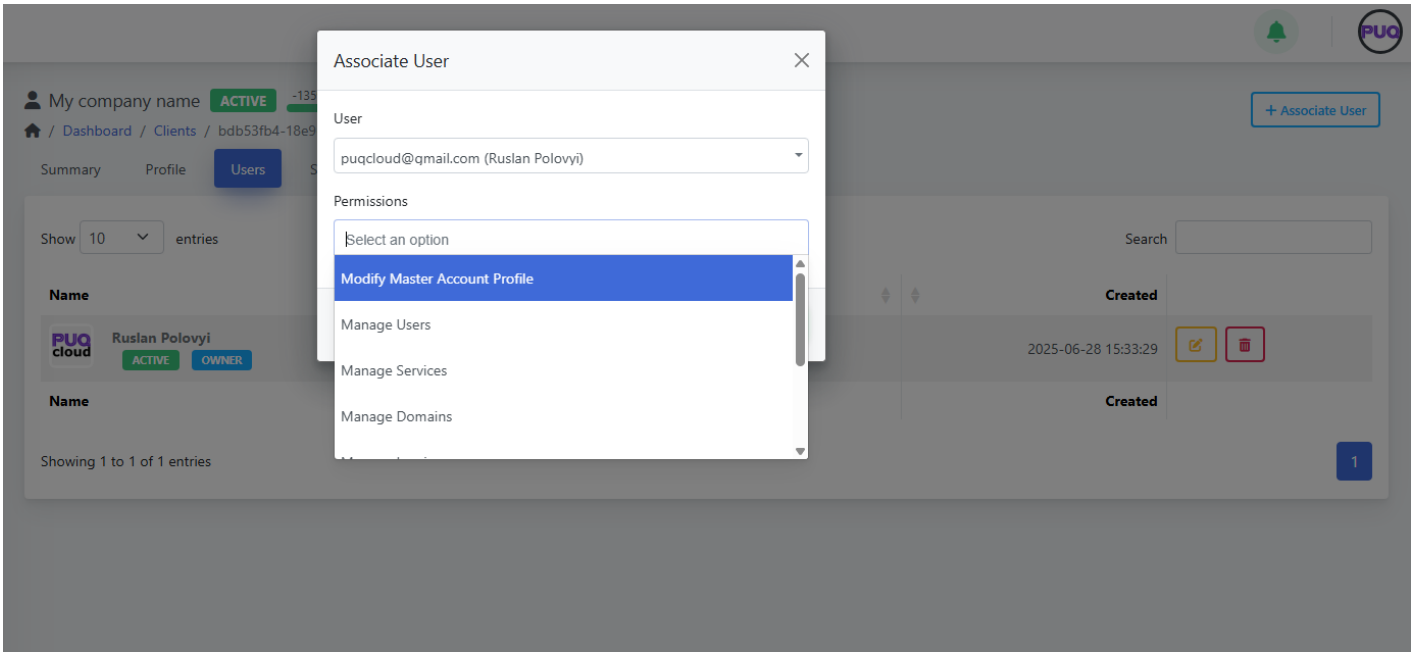
Users

- See associated users, 2FA status, contact info, and created date.
- Click **+ Associate User** to link an existing user account.
- Choose **Permissions** such as: *Modify Master Account Profile, Manage Users, Manage Services, Manage Domains,* etc.
- Use **Edit/Delete** to maintain user links.

(Screenshot: Client → Users tab)



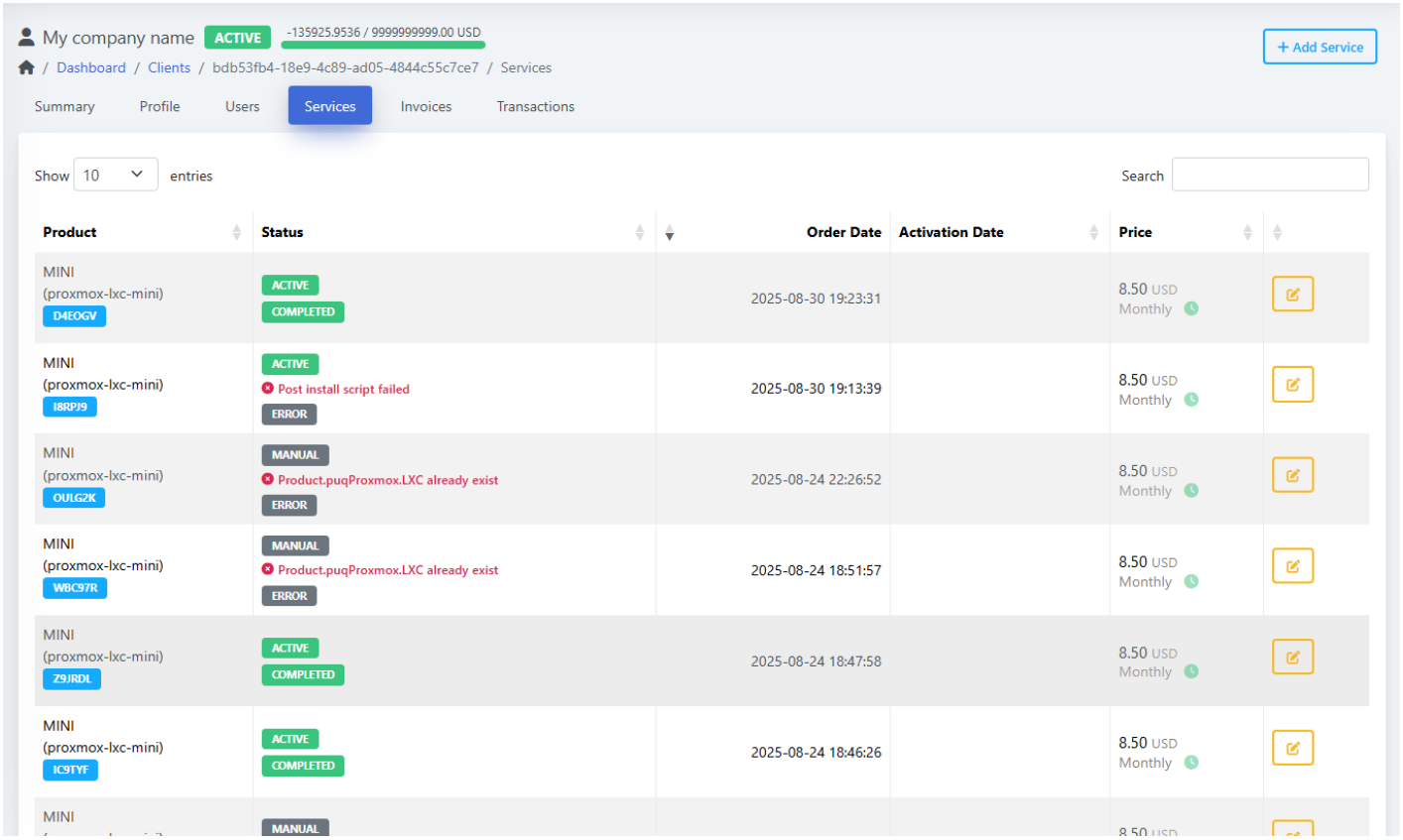
(*Screenshot: Associate User modal with permissions list)*



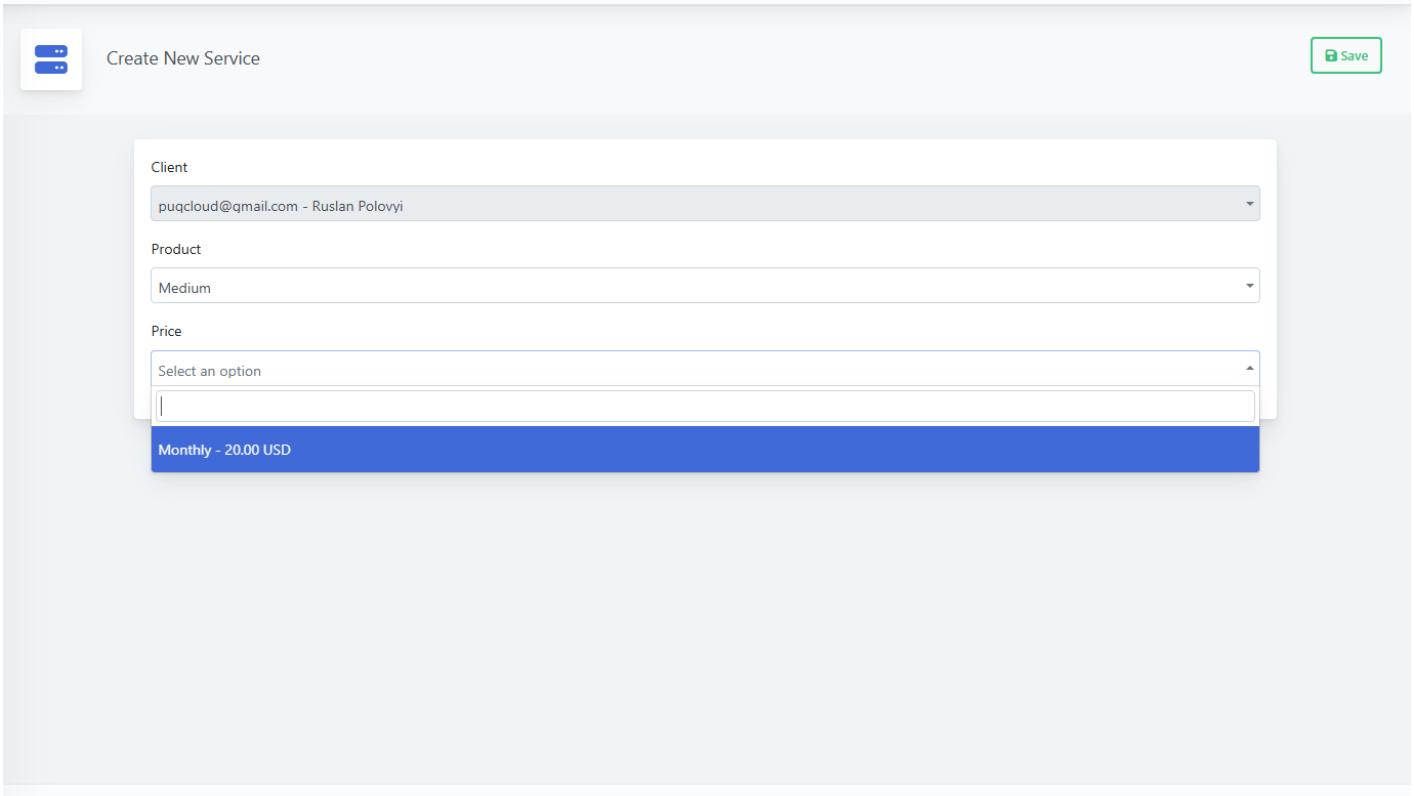
Services

- View all services with **status badges** (e.g., ACTIVE, COMPLETED, ERROR).
- See **Order Date**, **Activation Date**, and **Price**.
- Click **+ Add Service** to provision a product for this client:
  1. Select **Product**
  2. Choose **Price** (e.g., *Monthly – 20.00 USD*)
  3. Click **Save**

(Screenshot: Services list)



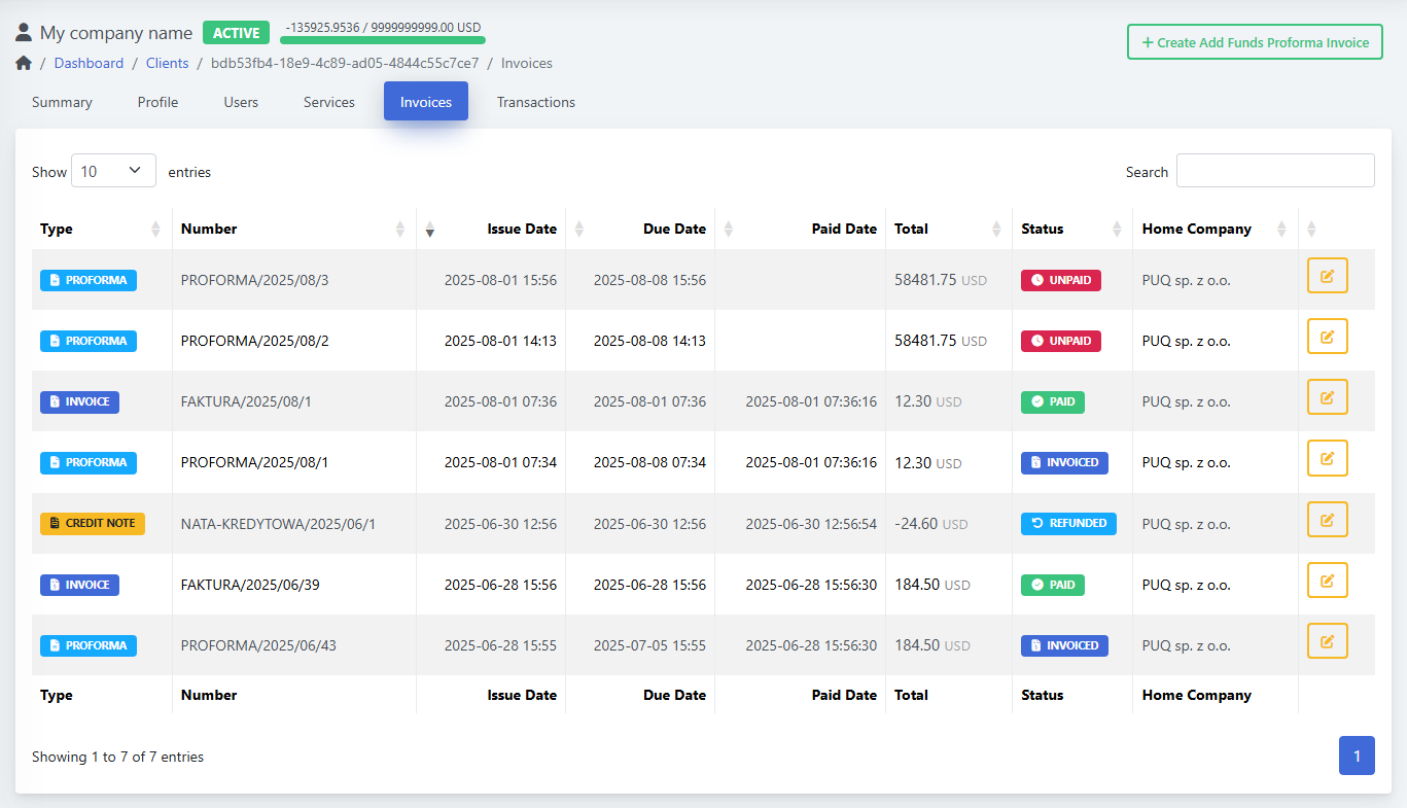
(Screenshot: Create New Service form)



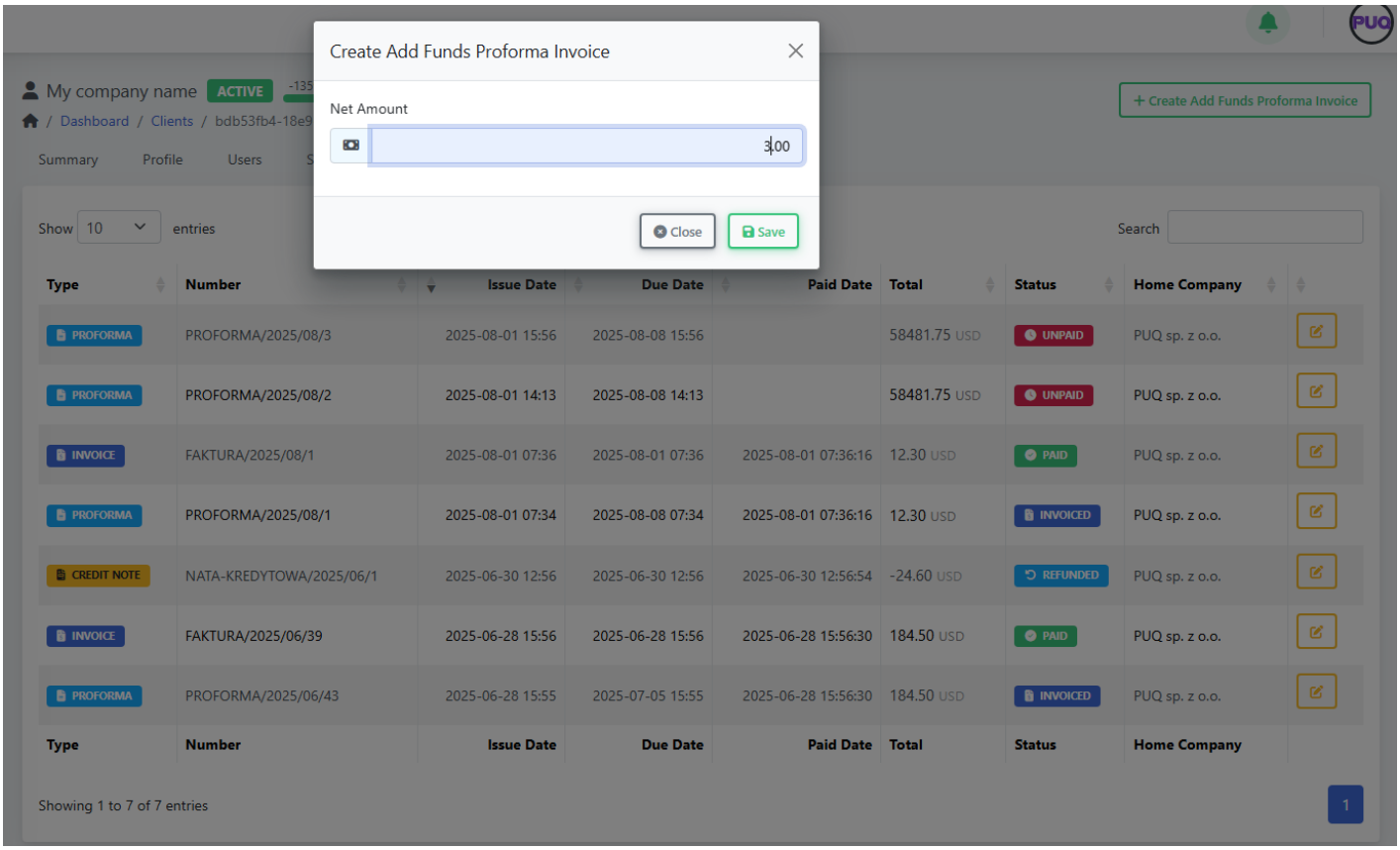
Invoices

- List shows **Type** (PROFORMA/INVOICE/CREDIT NOTE), **Number**, **Issue/Due/Paid Dates**, **Total**, **Status** (UNPAID/PAID/INVOICED/REFUNDED), and **Home Company**.
- **Create Add Funds Proforma Invoice**: opens a modal where you set **Net Amount** to top up client funds.

(Screenshot: Invoices list)



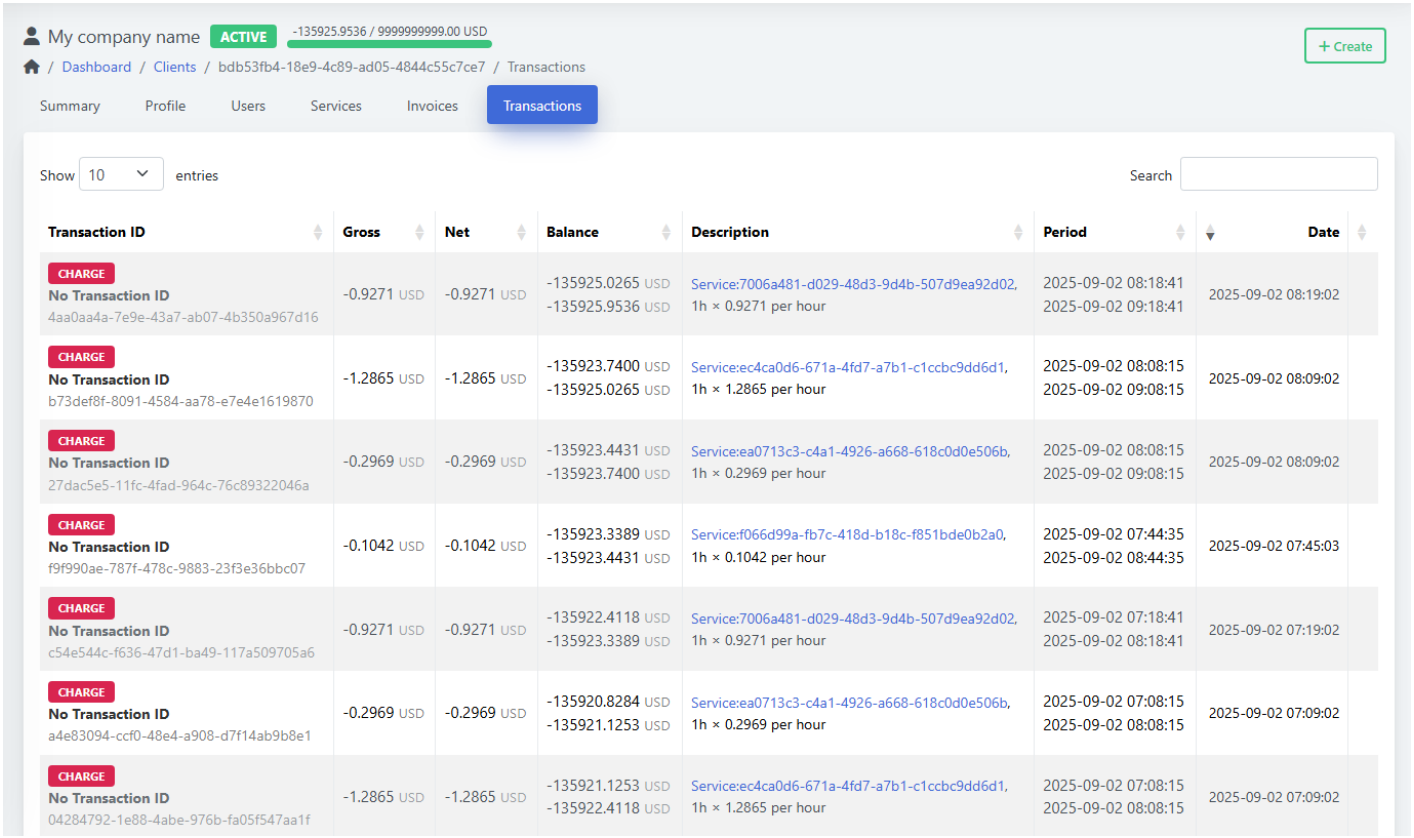
(*Screenshot: Create Add Funds Proforma Invoice modal)*



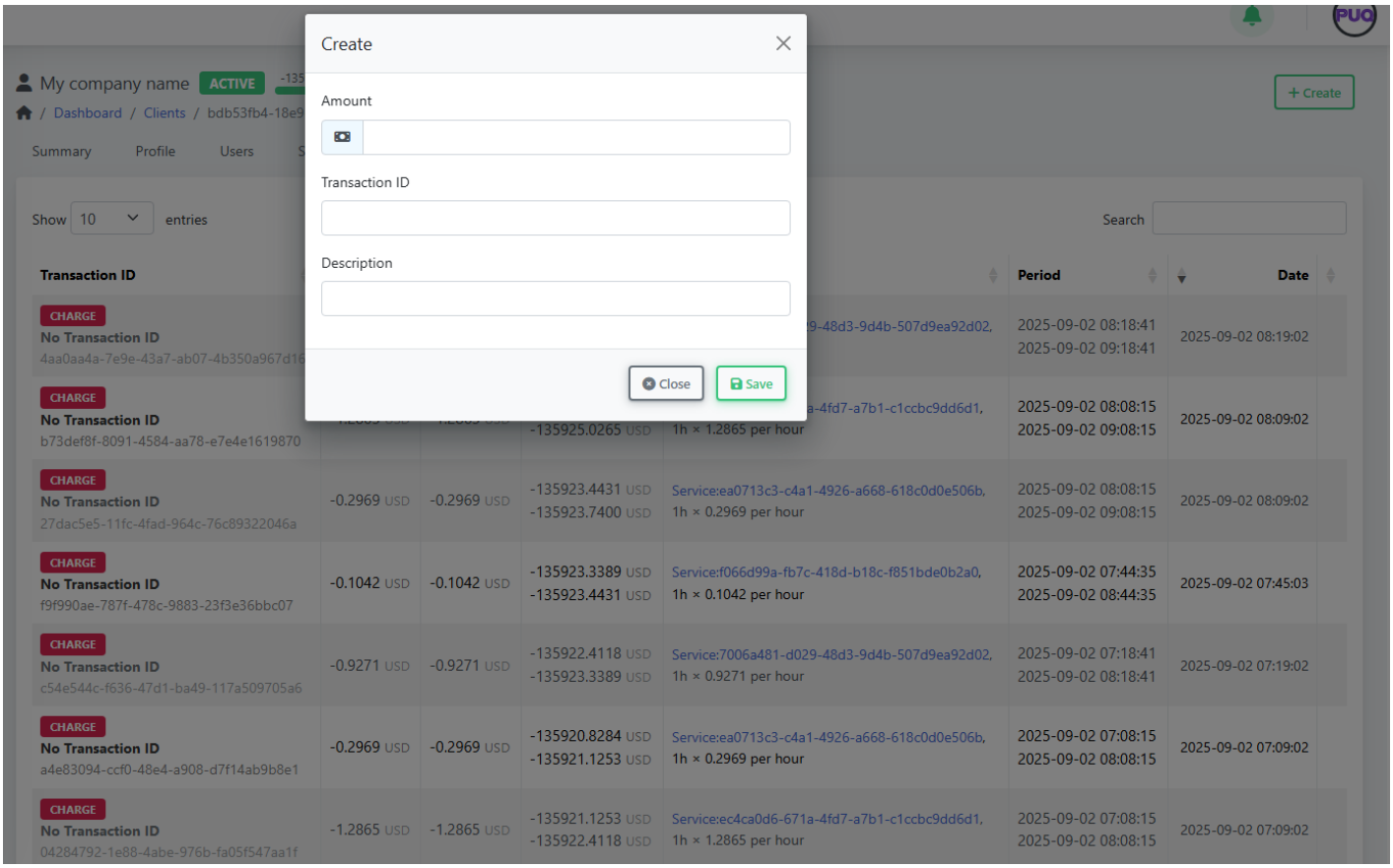
Transactions

- Ledger of **Gross**, **Net**, **Balance**, **Description** (usually linked to a service), **Period**, and **Date**.
- Click **Create** to add a manual transaction (charge or credit): set **Amount**, **Transaction ID** (optional), and **Description**, then **Save**.

(Screenshot: Transactions list)



(*Screenshot: Transactions → Create modal)*



Search, Filter, and Sort Clients

- Use the **Search** box on the client list to filter by name, email, or company.
- Click column headers to **sort** (e.g., by Created date or Balance).
- Status badges (**NEW**, **ACTIVE**) help you visually triage records.

Editing & Lifecycle

- Change **Status** (e.g., New → Active) from the **Profile** tab.
- Update **Tax ID** or **Language/Currency** any time; new settings apply to future invoices.
- Maintain **Credit Limit** to control spending and alerting.
- Keep **Admin Notes** for internal context (billing agreements, support history, etc.).

Best Practices

- Keep **addresses** current—billing address prints on invoices.
- Use **Users & permissions** to grant least-privilege access.
- Prefer **Add Funds Proforma** for prepayments; reconcile via **Transactions**.
- Review **Services** after order to confirm status (look for **ERROR** badges and fix product-side issues).

Troubleshooting

- **Invoice in wrong currency** → Check client **Currency** in Profile before creating invoices.
- **Taxes not applying as expected** → Verify **Home Company** tax rules and client **Tax ID**.
- **User cannot see services** → Revisit **Users** → permissions (grant *Manage Services*).
- **Provisioning error** on service → Open service details and review the last error note; re-run or fix product configuration.

Shortcuts

- **Clients → Manage Clients**: quick search and open profile.
- On **Summary**, use **Login as Owner** to replicate the customer view for support.

You’re done!

You can now add clients, attach their users and addresses, create services, and manage billing—everything from one place in **PUQcloud Panel**.

Revision #8
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