

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*)

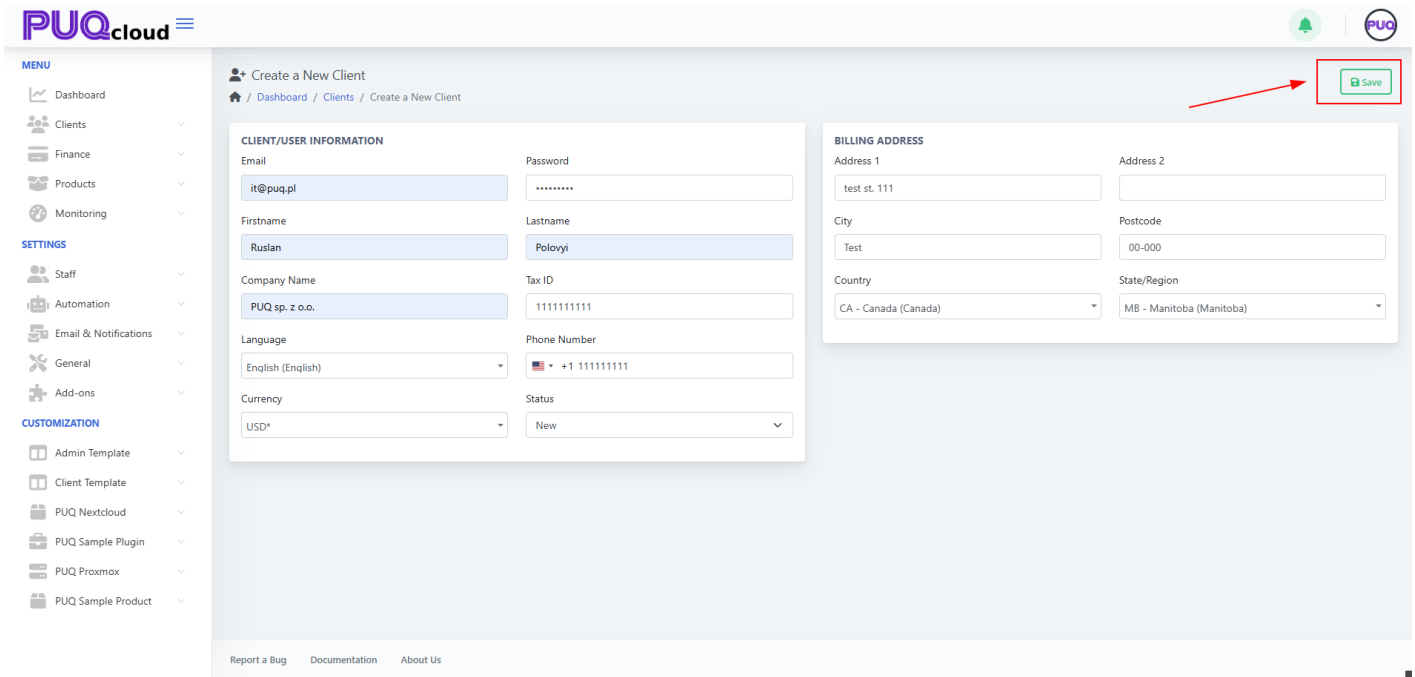
The screenshot shows the 'View/Search Clients' interface in PUQcloud. The sidebar on the left contains a 'MENU' section with 'Dashboard', 'Clients', 'Manage Clients', and 'Manage Users'. Below that are 'SETTINGS' (Staff, Automation, Email & Notifications, General, Add-ons) and 'CUSTOMIZATION' (Admin Template, Client Template, PUQ Proxmox, PUQ Nextcloud, PUQ Sample Plugin). The main area shows a table of clients with the following data:

| Owner | Client | Status | Located | Created | Balance |
|---|--|--------|--|------------------------|---|
| langlemichaelraynel@gmail.com langlemichaelraynel null | langlemichaelraynel null | NEW | Canada | 2025-07-20 16:56:31 | 0.00 USD 0.00 USD |
| puqcloud@gmail.com Ruslan Polovyi | Ruslan Polovyi (My company name) 12345678 | ACTIVE | Poland Warszawa | 2025-06-28 15:33:29 | -135,925.9536 USD 9,999,999,999.00 USD |
| i.mann@icloud.com Isac Mann | Isac Mann (Zenith Systems Associates) 983182602RT0001 | NEW | Ireland Beulahfurt | 2025-06-25 23:50:45 | 0.0620 USD 0.00 USD |
| t.ruecker@icloud.com Tristan Ruecker | Tristian Ruecker (BridgePath Enterprises) | NEW | Canada Ashtyntown | 2025-06-25 23:50:45 | 0.00 USD 0.00 USD |
| anissa.rosenbaum@hotmail.com Anissa Rosenbaum | Anissa Rosenbaum (International Zenith Enterprises) 00265009736 | NEW | Maldives North Addresside | 2025-06-25 23:50:44 | 0.00 USD 0.00 USD |
| g.breitenberg@tutanota.com Gabriel Breitenberg | Gabriel Breitenberg 940769021RT0001 | NEW | Zambia North Kaitlin | 2025-06-25 23:50:44 | 0.00 USD 0.00 USD |
| c.conroy@icloud.com Colten Conroy | Colten Conroy | ACTIVE | Anguilla Hettingertown | 2025-06-25 23:50:44 | 1,000.00 USD 0.00 USD |
| zoe_labadie@yahoo.com Zoe Labadie | Zoe Labadie | ACTIVE | Saint Vincent And Grenadines Gleasonfort | 2025-06-25 23:50:44 | 0.00 USD 0.00 USD |

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

- MENU**
- Dashboard
- Clients
- Finance
- Products
- Monitoring
- SETTINGS**
- Staff
- Automation
- Email & Notifications
- General
- Add-ons
- CUSTOMIZATION**
- Admin Template
- Client Template
- PUQ Nextcloud
- PUQ Sample Plugin
- PUQ Proxmox
- PUQ Sample Product

My company name **ACTIVE** -46406.1359 / 0.00 USD

Dashboard / Clients / bdb53fb4-18e9-4c89-ad05-4844c55c7ce7 / Summary

Summary Profile Users Services Invoices Transactions

| Client Finance | | Client Information | | Actions |
|----------------|--------------------------------|--|--------------------|----------------|
| Balance | -46,406.1359 USD | Name | Ruslan Polovyi | Login as Owner |
| Credit Limit | 0.00 USD | Company Name | My company name | |
| VIES Status | Invalid 2025-07-01 14:51:53 | Tax ID | 12345678 | |
| Home Company | PUQ sp. z o.o. | Email | puqcloud@gmail.com | |
| Taxes | VAT: 23.000% | Email Verified | VERIFIED | |
| | | Language | English | |
| | | My home 1 loc 2, 02-454 Warszawa, Malopolskie, Poland | | |
| | | Created At | 2025-06-28 15:33 | |

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)

My company name **ACTIVE** -135925.9536 / 9999999999.00 USD

Dashboard / Clients / bdb53fb4-18e9-4c89-ad05-4844c55c7ce7 / Profile

Summary Profile Users Services Invoices Transactions

Firstname: Lastname:

Company Name:

Tax ID: Status:

Language: Currency:

Credit Limit:

Admin Notes:

Show entries Search

| Name | Contact | Address | |
|-----------------|--|--|---|
| Default billing | Ruslan Polovyi puqcloud@gmail.com +1123456789 | My home 1 loc 2, 02-454 Warszawa, Malopolskie, Poland | <input type="button" value="Edit"/> <input type="button" value="Delete"/> |
| Test1 shipping | Test test@test.ppp | Test Add, 123456 WAW, Warminsko-Mazurskie, Poland | <input type="button" value="Edit"/> <input type="button" value="Delete"/> |

Showing 1 to 2 of 2 entries 1

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

The screenshot shows a 'Create Address' modal window. The modal has a title bar with 'Create' and a close button. The form fields are as follows:

- Type: Billing (dropdown)
- Name: [text input]
- Contact: [text input]
- Phone Number: [country code dropdown] +1 [text input]
- Email: [text input]
- Address 1: [text input]
- Address 2: [text input]
- City: [text input]
- Postcode: [text input]
- Country: Select an option (dropdown)
- State/Region: [text input]

At the bottom of the modal are 'Close' and 'Save' buttons. In the background, the client profile page is visible, and a '+ Create Address' button is highlighted with a red box.

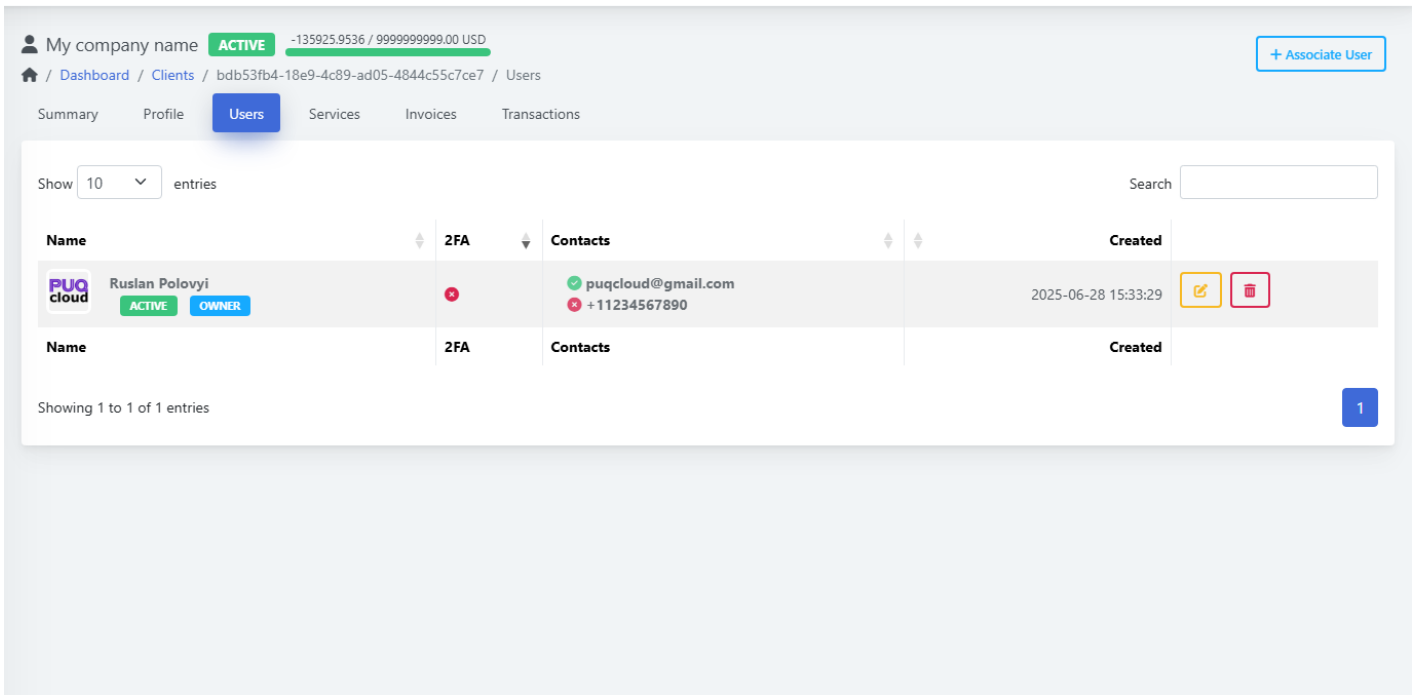
Address Types

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

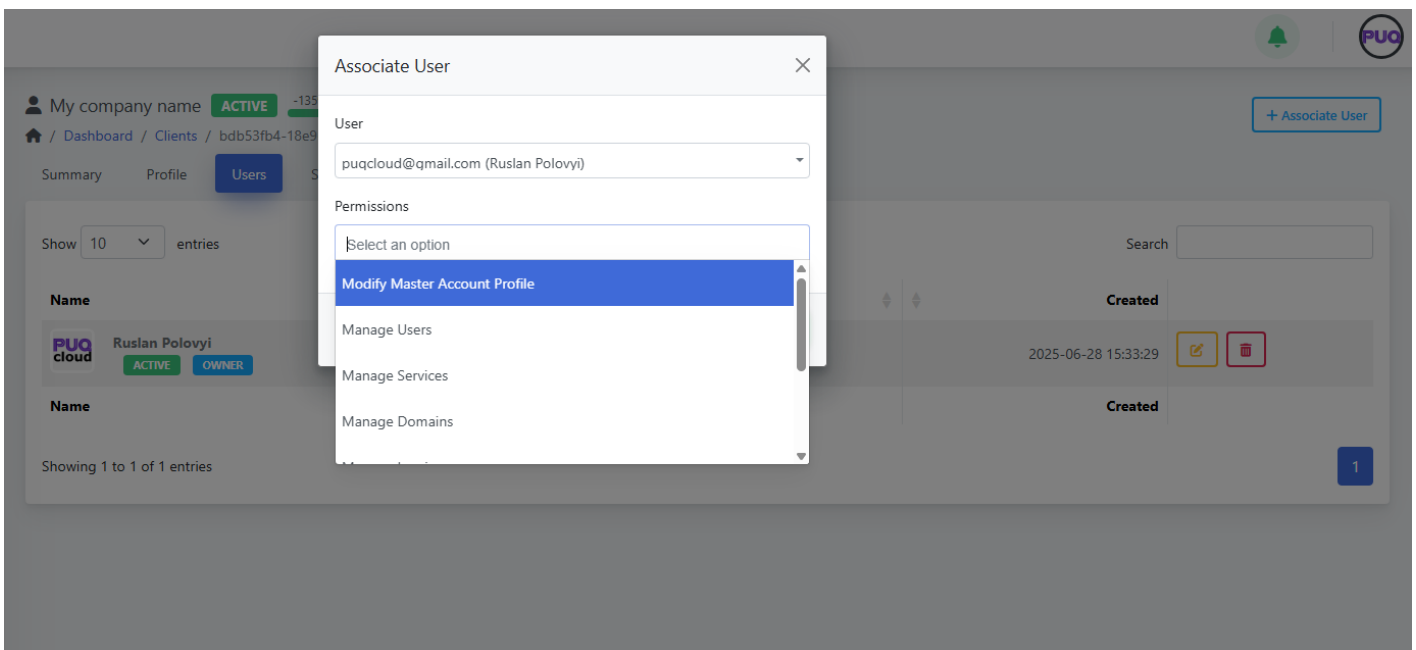
Users

- 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)

My company name **ACTIVE** -135925.9536 / 9999999999.00 USD + Add Service

/ Dashboard / Clients / bdb53fb4-18e9-4c89-ad05-4844c55c7ce7 / Services

Summary Profile Users **Services** Invoices Transactions

Show 10 entries Search

| Product | Status | Order Date | Activation Date | Price | |
|---------------------------------------|---|---------------------|-----------------|------------------|--|
| MINI (proxmox-lxc-mini) D4E0GV | ACTIVE COMPLETED | 2025-08-30 19:23:31 | | 8.50 USD Monthly | |
| MINI (proxmox-lxc-mini) 18RP9J | ACTIVE Post install script failed ERROR | 2025-08-30 19:13:39 | | 8.50 USD Monthly | |
| MINI (proxmox-lxc-mini) OULG2K | MANUAL Product.puqProxmox.LXC already exist ERROR | 2025-08-24 22:26:52 | | 8.50 USD Monthly | |
| MINI (proxmox-lxc-mini) WBC97R | MANUAL Product.puqProxmox.LXC already exist ERROR | 2025-08-24 18:51:57 | | 8.50 USD Monthly | |
| MINI (proxmox-lxc-mini) Z9JRDJ | ACTIVE COMPLETED | 2025-08-24 18:47:58 | | 8.50 USD Monthly | |
| MINI (proxmox-lxc-mini) 1C9TYE | ACTIVE COMPLETED | 2025-08-24 18:46:26 | | 8.50 USD Monthly | |
| MINI | MANUAL | | | 8.50 USD | |

(Screenshot: Create New Service form)

Create New Service Save

Client: puqcloud@gmail.com - Ruslan Polovyj

Product: Medium

Price: Select an option

Monthly - 20.00 USD

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)

My company name **ACTIVE** -135925.9536 / 9999999999.00 USD + Create Add Funds Proforma Invoice

[Dashboard](#) / [Clients](#) / bdb53fb4-18e9-4c89-ad05-4844c55c7ce7 / [Invoices](#)

Summary Profile Users Services **Invoices** Transactions

Show 10 entries Search

| Type | Number | Issue Date | Due Date | Paid Date | Total | Status | Home Company |
|-------------|--------------------------|------------------|------------------|---------------------|--------------|----------|----------------|
| PROFORMA | PROFORMA/2025/08/3 | 2025-08-01 15:56 | 2025-08-08 15:56 | | 58481.75 USD | UNPAID | PUQ sp. z o.o. |
| PROFORMA | PROFORMA/2025/08/2 | 2025-08-01 14:13 | 2025-08-08 14:13 | | 58481.75 USD | UNPAID | PUQ sp. z o.o. |
| INVOICE | FAKTURA/2025/08/1 | 2025-08-01 07:36 | 2025-08-01 07:36 | 2025-08-01 07:36:16 | 12.30 USD | PAID | PUQ sp. z o.o. |
| PROFORMA | PROFORMA/2025/08/1 | 2025-08-01 07:34 | 2025-08-08 07:34 | 2025-08-01 07:36:16 | 12.30 USD | INVOICED | PUQ sp. z o.o. |
| CREDIT NOTE | NATA-KREDYTOWA/2025/06/1 | 2025-06-30 12:56 | 2025-06-30 12:56 | 2025-06-30 12:56:54 | -24.60 USD | REFUNDED | PUQ sp. z o.o. |
| INVOICE | FAKTURA/2025/06/39 | 2025-06-28 15:56 | 2025-06-28 15:56 | 2025-06-28 15:56:30 | 184.50 USD | PAID | PUQ sp. z o.o. |
| PROFORMA | PROFORMA/2025/06/43 | 2025-06-28 15:55 | 2025-07-05 15:55 | 2025-06-28 15:56:30 | 184.50 USD | INVOICED | PUQ sp. z o.o. |

Showing 1 to 7 of 7 entries 1

(Screenshot: Create Add Funds Proforma Invoice modal)

The screenshot displays a web application interface. At the top, there is a user profile section with 'My company name' and an 'ACTIVE' status. A navigation breadcrumb shows 'Dashboard / Clients / bdb53fb4-18e9'. A modal dialog titled 'Create Add Funds Proforma Invoice' is open, featuring a 'Net Amount' input field with a currency symbol and a value of '3.00'. Below the input are 'Close' and 'Save' buttons. In the background, a table lists transactions with columns: Type, Number, Issue Date, Due Date, Paid Date, Total, Status, and Home Company. The table contains seven rows of data, including Proforma invoices and invoices with various statuses like UNPAID, PAID, and INVOICED. A search bar is visible on the right, and a page indicator shows 'Showing 1 to 7 of 7 entries' at the bottom left.

| Type | Number | Issue Date | Due Date | Paid Date | Total | Status | Home Company |
|-------------|--------------------------|------------------|------------------|---------------------|--------------|----------|----------------|
| PROFORMA | PROFORMA/2025/08/3 | 2025-08-01 15:56 | 2025-08-08 15:56 | | 58481.75 USD | UNPAID | PUQ sp. z o.o. |
| PROFORMA | PROFORMA/2025/08/2 | 2025-08-01 14:13 | 2025-08-08 14:13 | | 58481.75 USD | UNPAID | PUQ sp. z o.o. |
| INVOICE | FAKTURA/2025/08/1 | 2025-08-01 07:36 | 2025-08-01 07:36 | 2025-08-01 07:36:16 | 12.30 USD | PAID | PUQ sp. z o.o. |
| PROFORMA | PROFORMA/2025/08/1 | 2025-08-01 07:34 | 2025-08-08 07:34 | 2025-08-01 07:36:16 | 12.30 USD | INVOICED | PUQ sp. z o.o. |
| CREDIT NOTE | NATA-KREDYTOWA/2025/06/1 | 2025-06-30 12:56 | 2025-06-30 12:56 | 2025-06-30 12:56:54 | -24.60 USD | REFUNDED | PUQ sp. z o.o. |
| INVOICE | FAKTURA/2025/06/39 | 2025-06-28 15:56 | 2025-06-28 15:56 | 2025-06-28 15:56:30 | 184.50 USD | PAID | PUQ sp. z o.o. |
| PROFORMA | PROFORMA/2025/06/43 | 2025-06-28 15:55 | 2025-07-05 15:55 | 2025-06-28 15:56:30 | 184.50 USD | INVOICED | PUQ sp. z o.o. |

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)

My company name **ACTIVE** -135925.9536 / 999999999.00 USD + Create

Dashboard / Clients / bdb53fb4-18e9-4c89-ad05-4844c55c7ce7 / Transactions

Summary Profile Users Services Invoices **Transactions**

Show 10 entries Search

| Transaction ID | Gross | Net | Balance | Description | Period | Date |
|--|-------------|-------------|--------------------------------------|---|--|---------------------|
| CHARGE No Transaction ID 4aa0aa4a-7e9e-43a7-ab07-4b350a967d16 | -0.9271 USD | -0.9271 USD | -135925.0265 USD -135925.9536 USD | Service:7006a481-d029-48d3-9d4b-507d9ea92d02, 1h × 0.9271 per hour | 2025-09-02 08:18:41 2025-09-02 09:18:41 | 2025-09-02 08:19:02 |
| CHARGE No Transaction ID b73def8f-8091-4584-aa78-e7e4e1619870 | -1.2865 USD | -1.2865 USD | -135923.7400 USD -135925.0265 USD | Service:ec4ca0d6-671a-4fd7-a7b1-c1ccbc9dd6d1, 1h × 1.2865 per hour | 2025-09-02 08:08:15 2025-09-02 09:08:15 | 2025-09-02 08:09:02 |
| CHARGE No Transaction ID 27dac5e5-11fc-4fad-964c-76c89322046a | -0.2969 USD | -0.2969 USD | -135923.4431 USD -135923.7400 USD | Service:ea0713c3-c4a1-4926-a668-618c0d0e506b, 1h × 0.2969 per hour | 2025-09-02 08:08:15 2025-09-02 09:08:15 | 2025-09-02 08:09:02 |
| CHARGE No Transaction ID f9f990ae-787f-478c-9883-23f3e36bbc07 | -0.1042 USD | -0.1042 USD | -135923.3389 USD -135923.4431 USD | Service:f066d99a-fb7c-418d-b18c-f851bde0b2a0, 1h × 0.1042 per hour | 2025-09-02 07:44:35 2025-09-02 08:44:35 | 2025-09-02 07:45:03 |
| CHARGE No Transaction ID c54e544c-f636-47d1-ba49-117a509705a6 | -0.9271 USD | -0.9271 USD | -135922.4118 USD -135923.3389 USD | Service:7006a481-d029-48d3-9d4b-507d9ea92d02, 1h × 0.9271 per hour | 2025-09-02 07:18:41 2025-09-02 08:18:41 | 2025-09-02 07:19:02 |
| CHARGE No Transaction ID a4e83094-ccf0-48e4-a908-d7f14ab9b8e1 | -0.2969 USD | -0.2969 USD | -135920.8284 USD -135921.1253 USD | Service:ea0713c3-c4a1-4926-a668-618c0d0e506b, 1h × 0.2969 per hour | 2025-09-02 07:08:15 2025-09-02 08:08:15 | 2025-09-02 07:09:02 |
| CHARGE No Transaction ID 04284792-1e88-4abe-976b-fa05f547aa1f | -1.2865 USD | -1.2865 USD | -135921.1253 USD -135922.4118 USD | Service:ec4ca0d6-671a-4fd7-a7b1-c1ccbc9dd6d1, 1h × 1.2865 per hour | 2025-09-02 07:08:15 2025-09-02 08:08:15 | 2025-09-02 07:09:02 |

(Screenshot: Transactions → Create modal)

My company name **ACTIVE** -135925.9536 / 999999999.00 USD + Create

Dashboard / Clients / bdb53fb4-18e9-4c89-ad05-4844c55c7ce7 / Transactions

Summary Profile Users Services Invoices **Transactions**

Show 10 entries Search

| Transaction ID | Gross | Net | Balance | Description | Period | Date |
|--|-------------|-------------|--------------------------------------|---|--|---------------------|
| CHARGE No Transaction ID 4aa0aa4a-7e9e-43a7-ab07-4b350a967d16 | -0.9271 USD | -0.9271 USD | -135925.0265 USD -135925.9536 USD | Service:7006a481-d029-48d3-9d4b-507d9ea92d02, 1h × 0.9271 per hour | 2025-09-02 08:18:41 2025-09-02 09:18:41 | 2025-09-02 08:19:02 |
| CHARGE No Transaction ID b73def8f-8091-4584-aa78-e7e4e1619870 | -1.2865 USD | -1.2865 USD | -135923.7400 USD -135925.0265 USD | Service:ec4ca0d6-671a-4fd7-a7b1-c1ccbc9dd6d1, 1h × 1.2865 per hour | 2025-09-02 08:08:15 2025-09-02 09:08:15 | 2025-09-02 08:09:02 |
| CHARGE No Transaction ID 27dac5e5-11fc-4fad-964c-76c89322046a | -0.2969 USD | -0.2969 USD | -135923.4431 USD -135923.7400 USD | Service:ea0713c3-c4a1-4926-a668-618c0d0e506b, 1h × 0.2969 per hour | 2025-09-02 08:08:15 2025-09-02 09:08:15 | 2025-09-02 08:09:02 |
| CHARGE No Transaction ID f9f990ae-787f-478c-9883-23f3e36bbc07 | -0.1042 USD | -0.1042 USD | -135923.3389 USD -135923.4431 USD | Service:f066d99a-fb7c-418d-b18c-f851bde0b2a0, 1h × 0.1042 per hour | 2025-09-02 07:44:35 2025-09-02 08:44:35 | 2025-09-02 07:45:03 |
| CHARGE No Transaction ID c54e544c-f636-47d1-ba49-117a509705a6 | -0.9271 USD | -0.9271 USD | -135922.4118 USD -135923.3389 USD | Service:7006a481-d029-48d3-9d4b-507d9ea92d02, 1h × 0.9271 per hour | 2025-09-02 07:18:41 2025-09-02 08:18:41 | 2025-09-02 07:19:02 |
| CHARGE No Transaction ID a4e83094-ccf0-48e4-a908-d7f14ab9b8e1 | -0.2969 USD | -0.2969 USD | -135920.8284 USD -135921.1253 USD | Service:ea0713c3-c4a1-4926-a668-618c0d0e506b, 1h × 0.2969 per hour | 2025-09-02 07:08:15 2025-09-02 08:08:15 | 2025-09-02 07:09:02 |
| CHARGE No Transaction ID 04284792-1e88-4abe-976b-fa05f547aa1f | -1.2865 USD | -1.2865 USD | -135921.1253 USD -135922.4118 USD | Service:ec4ca0d6-671a-4fd7-a7b1-c1ccbc9dd6d1, 1h × 1.2865 per hour | 2025-09-02 07:08:15 2025-09-02 08:08:15 | 2025-09-02 07:09:02 |

Create ✕

Amount

Transaction ID

Description

Close Save

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**.
