

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*)

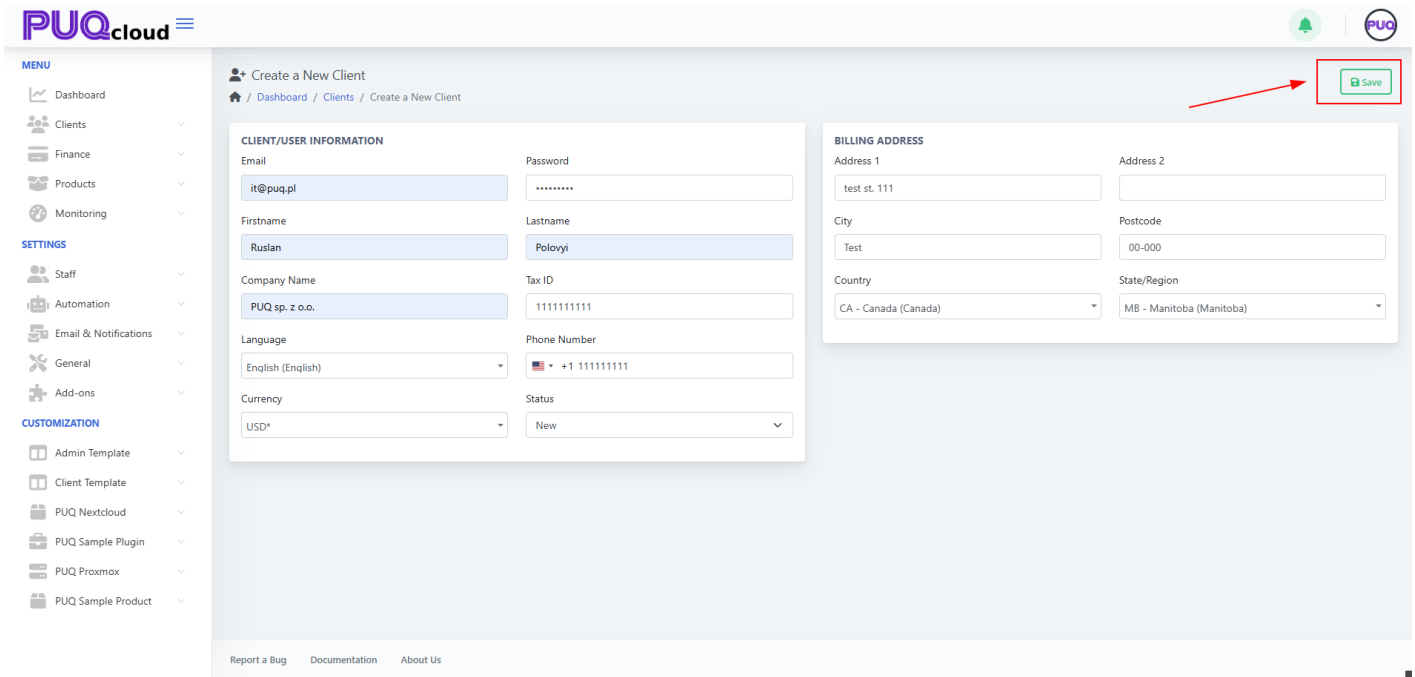
The screenshot shows the PUQcloud interface. On the left is a sidebar menu with categories: MENU (Dashboard, Clients, Finance, Products, Monitoring), SETTINGS (Staff, Automation, Email & Notifications, General, Add-ons), and CUSTOMIZATION (Admin Template, Client Template, PUQ Proxmox, PUQ Nextcloud, PUQ Sample Plugin). The main area is titled 'View/Search Clients' and contains a table of clients. The table has columns: Owner, Client, Status, Located, Created, and Balance. A '+ Create' button is in the top right.

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

Save
+ Create Address

<p>Firstname: <input type="text" value="Ruslan"/></p> <p>Lastname: <input type="text" value="Polovyi"/></p> <p>Company Name: <input type="text" value="My company name"/></p> <p>Tax ID: <input type="text" value="12345678"/></p> <p>Status: <input type="text" value="Active"/></p> <p>Language: <input type="text" value="English (English)"/></p> <p>Currency: <input type="text" value="USD"/></p> <p>Credit Limit: <input type="text" value="9999999999.00"/></p> <p>Admin Notes: <input type="text" value="TTTT"/></p>	<p>Show 10 entries Search <input type="text"/></p> <table border="1"> <thead> <tr> <th>Name</th> <th>Contact</th> <th>Address</th> <th></th> </tr> </thead> <tbody> <tr> <td>Default billing</td> <td>Ruslan Polovyi puqcloud@gmail.com +1123456789</td> <td>My home 1 loc 2, 02-454 Warszawa, Malopolskie, Poland</td> <td> </td> </tr> <tr> <td>Test1 shipping</td> <td>Test test@test.ppp</td> <td>Test Add, 123456 WAW, Warminsko-Mazurskie, Poland</td> <td> </td> </tr> </tbody> </table> <p>Showing 1 to 2 of 2 entries</p>	Name	Contact	Address		Default billing	Ruslan Polovyi puqcloud@gmail.com +1123456789	My home 1 loc 2, 02-454 Warszawa, Malopolskie, Poland		Test1 shipping	Test test@test.ppp	Test Add, 123456 WAW, Warminsko-Mazurskie, Poland	
Name	Contact	Address											
Default billing	Ruslan Polovyi puqcloud@gmail.com +1123456789	My home 1 loc 2, 02-454 Warszawa, Malopolskie, Poland											
Test1 shipping	Test test@test.ppp	Test Add, 123456 WAW, Warminsko-Mazurskie, Poland											

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

The screenshot shows a 'Create Address' modal window overlaid on a client profile page. The modal contains the following fields:

- Type: Billing (dropdown)
- Name: [Text Input]
- Contact: [Text Input]
- Phone Number: [Text Input] with a country code dropdown (+1)
- 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] (dropdown)

Buttons: Close, Save

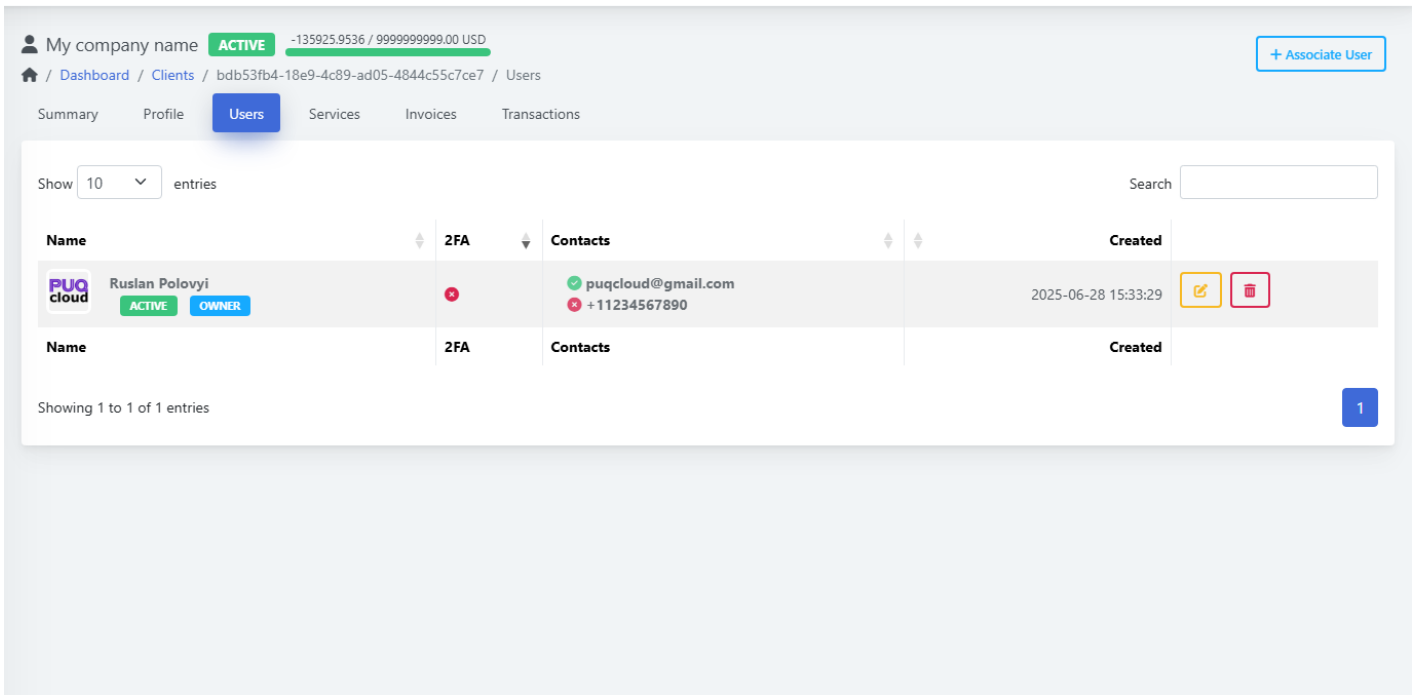
Address Types

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

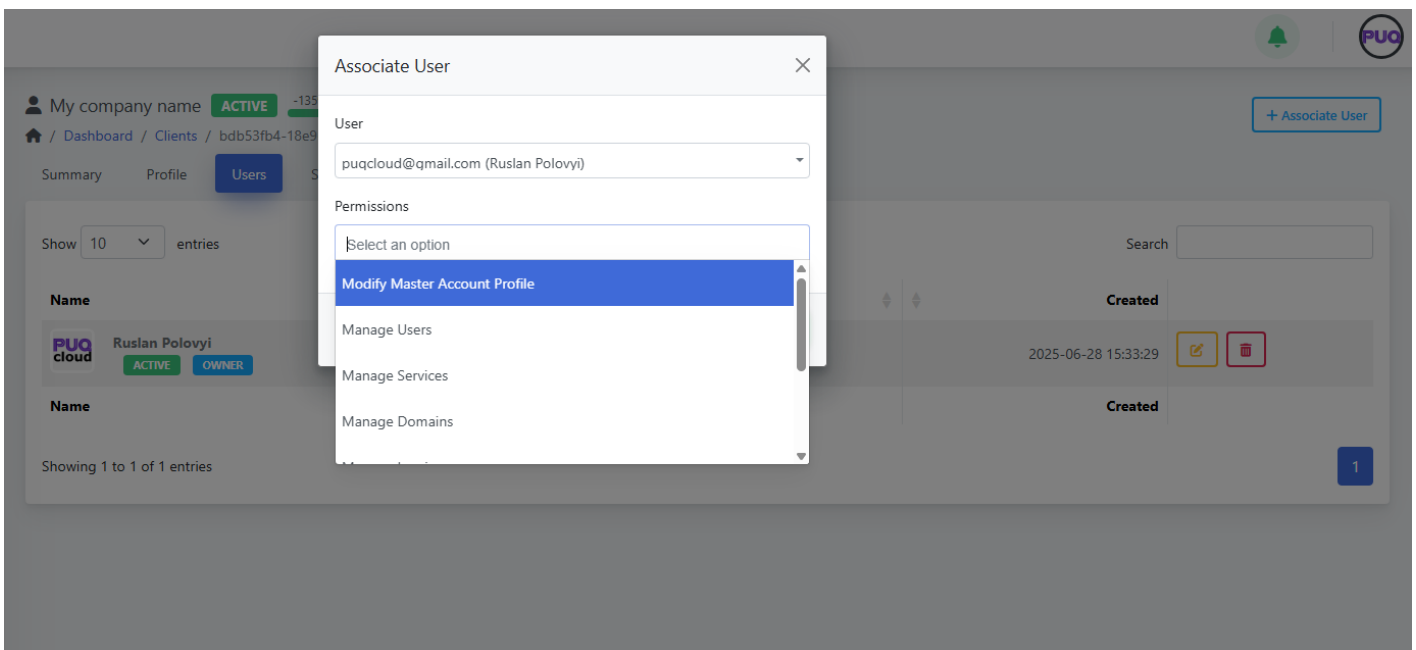
Users

- 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

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[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)

My company name ACTIVE -135

/ Dashboard / Clients / bdb53fb4-18e9

Summary Profile Users

Show 10 entries

Search

Create Add Funds Proforma Invoice

Net Amount

₺00

Close Save

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

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**.
