PROBEGIN

Creating Connections

User manual
WHMCS Advanced Auto Login

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1. INTRODUCTION

Introduction section explains in general terms the system and the purpose for which it is intended.

1.1 System Overview

Invoice Auto Login is a module, which allows:
- Add Auto Login link to email templates to simplify login process for clients.
- Quick login from PDF Invoice to the clientportal in one click.
- Configure if client can only access to pay invoices or login to their client area as well.
- Set up expiration period for Auto Login link.

1.2 System Configuration

Invoice Auto Login is compatible with WHMCS 6 and 7. WHMCS 7.x supports PHP 5.6 and 7.x. The application requires connection to Internet in order to save data to database. Data saved in database can be seen using any major Internet browser.

1.3 User Access Levels

Users with **Full Administrator** role can use the Module.

2. GETTING STARTED

Getting Started section explains how to get Advanced Auto Login Module.
The section briefly presents system menu.

2.1 Activate the Module

First of all User should activate Advanced Auto Login Module. For that:
1. Hover the **Setup** tab.
2. Click on the **Addon Modules**.
3. Click on the **Activate** button near the **Advanced Auto Login**.

» Advanced Auto Login
Allows your clients to login via the Auto Login link, which was sent in invoice email. This link will expire in a specified period or when the invoice is paid or cancelled.

	2.0	PROBEGIN	Activate	Deactivate Configure

2.3 Configure the Module

Users also should set up configurations of the Module. So after activation the Module they should do the next actions:

1. Click on the **Configure** button.
2. Check option **1** to add the ability for Clients to see their profile after Auto Login.

Auto login to profile or only to invoice? ☑ Check this option if client can also see their profile after autologin. Standard client can only see their invoice because of security reasons.

Days when Autologin link expire — 10 ▼ days

Access Control — Choose the admin role groups to permit access to this module:
2 → ☑ Full Administrator ☐ Sales Operator ☐ Support Operator

3. Set up Auto Login expiration.
4. Check option **2 (Full Administrator)** in **Access Control** section.
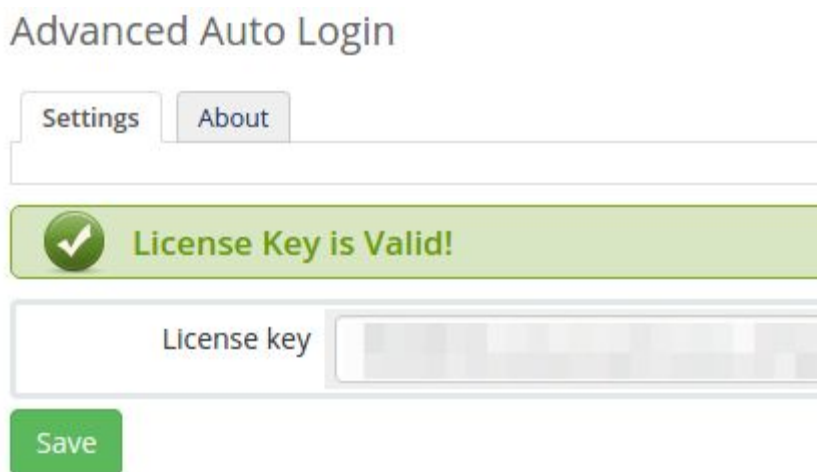5. Click on the **Save Changes** button.

2.3 Settings tab

Users must be licensed. License key can be added on **Settings** tab:

1. Hover the **Addons** tab.
2. Click on the **Invoice Auto Login**.

The **Setting** tab allows entering License key for accessing WHMCS Advanced Auto Login.

3. Fill in **License Key** field.
4. Click on the **Save** button.

3. USING THE MODULE

The WHMCS Advanced Auto Login Module allows your clients to login via a link sent in invoice emails.

3.1 Advanced Auto Login link

Invoice **Auto Login link** {$auto_login_link_html} is used in mailing process for **Invoice Messages**.

When the **Auto Login function** is set up and login token is created, user can click the generated link, and will be automatically logged in to the client area.

The **Auto Login link** sent to the customer will only be valid for a specific period of time. This link will expire when the invoice is paid or cancelled, also days to expire could be set manually in module (see at "Configure the Module").

3.2 Auto Login from Email Templates

Email Templates tab contains the default email templates that come supplied with the system. User can update them.

1. Go to **Setup** tab -> **Email Templates** tab
2. Choose a template from **Invoice Messages** box.

Invoice Messages

Status	Template Name	
✅	Credit Card Invoice Created	✉
✅	Credit Card Payment Confirmation	✉
✅	Credit Card Payment Due	✉
✅	Credit Card Payment Failed	✉
✅	First Invoice Overdue Notice	✉
✅	Invoice Created	✉
✅	Invoice Payment Confirmation	✉
✅	Invoice Payment Reminder	✉
✅	Invoice Refund Confirmation	✉
✅	Multi-Invoice Basic Default Template	✉
✅	Multi-Invoice Basic Dutch Template	✉
✅	Multi-Invoice Default Template	✉
✅	Multi-Invoice Dutch Template	✉
✅	Second Invoice Overdue Notice	✉
✅	Third Invoice Overdue Notice	✉

3. Click on the **edit** icon near the template.
4. Add text with {$auto_login_link_html} .

Dear {$client_name},

This is a notice that an invoice has been generated on {$invoice_date_created}.

Your payment method is: {$invoice_payment_method}

Invoice #{$invoice_num}
Amount Due: {$invoice_total}
Due Date: {$invoice_date_due}

Invoice Items

{$invoice_html_contents}

You can login to your client area to view and pay the invoice at {$auto_login_link_html}

{$signature}

3.3 Auto Login from PDF

Auto Login action can be reachable from Invoice PDF also (linked **PAY** button), for that should be done the next settings:

- Add (Replace) two files to the Template folder - **invoicepdf.tpl, pdf_autolink.php.**

OR

- Add the code line to the **invoicepdf.tpl** right after **<?php:**

  include_once("pdf_autolink.php");

- Add the auto login function *create_pdf_autologin_link($id)* to the appropriate line of **invoicepdf.tpl** file.