



PROBEGIN

Creating Connections

User manual
Credit Module

Revision history

Date	Description of Change	Author
March, 15 2017	v. 0.1 Initial Draft	Iryna Havryliuk
April, 12 2017	v. 1.0	Iryna Havryliuk



Table of Contents

INTRODUCTION	3
1.1 System Overview	3
1.2 System Configuration	3
1.3 User Access Levels	3
GETTING STARTED	4
2.1 Installing Credit Module	4
2.2 Activate the Module	4
2.3 Settings tab	4
USING THE MODULE	6
3.1 Create Credit Invoice	6
3.2 Refund Credit Invoice	7
3.3 Archive tab	9



1. INTRODUCTION

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

1.1 System Overview

WHMCS Credit Module gives you an opportunity to:

- Quickly & Easily create Credit invoices.
- Manage your Refund operations in just a few clicks.
- Choose your way to refund: with unpaid invoices, credits or manually.
- View the whole Refund history in the Module archive.

1.2 System Configuration

Credit Module is compatible with WHMCS 7. WHMCS 7.x supports PHP 5.6. The application requires connection to Internet in order to save data to database. Data saved in database can be seen using any major Internet browsers.

1.3 User Access Levels

Management options consist of activating and deactivating of the module. Access control allows full admin to define which of the roles can access the module (Configure stage).



2. GETTING STARTED

This guide will walk you through the basics of using Credit Module including how to create Credit Invoices and apply refund for a customer.

2.1 Installing Credit Module

Installing Credit Module is very simple. The following steps will guide you through the process:

1. Upload the **Credit Module zip** file to your server into `/modules/addons`
2. Unzip the contents of the zip file.
3. Login to the WHMCS Admin Area and configure your module (see the next unit).

2.2 Activate the Module

First of all User should activate Credit Invoice Module. For that:

1. Hover the **Setup** tab.
2. Click on the **Addon Modules**.
3. Click on the **Activate** button near the **Credit Invoice**.



4. Click on the **Configure** button.
5. Select roles which can access the module (**Full Administrator** is recommended).
6. 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 **Credit Invoice**.
3. Go to **Settings** tab.
4. Fill in **License Key** field.
5. Click on the **Save Settings** button.



License key:

Addon language:



** Congratulations! Your Credit module is ready to use.*



3. USING THE MODULE

WHMCS Credit Module is used for refunding customer's money. The module creates a new invoice for refund transactions, instead of reopening the original invoice.

3.1 Create Credit Invoice

The **Credit Invoice** can be created by selecting the Invoices you want to refund on the **Invoices** tab.

1. Go to **Invoices** tab.
2. Choose the Invoices you want to refund (you can use **Search/Filter** for searching).
3. Click on the **Create Credit Invoice** button.



* You may **Search/ Filter** for an Invoice(s) by any of the following fields:

- *Client Name.*
- *Line Item Description.*
- *Payment Method.*
- *Status.*
- *Invoice Date.*
- *Due Date.*
- *Date Paid.*
- *Total Due.*




3.2 Refund Credit Invoice

There are 3 options for refunding payments:

- **Manually** - This option exists to allow you to record refunds against invoices when the refund has been processed outside of the system.
- **With Unpaid Invoice** - This will reduce the chosen Unpaid Invoice(s) by **Credit Invoice** amount.
- **Add as Credit** - This allows you to refund money to the Clients Credit Balance for use towards future invoices.


To perform **Manual Refund**, follow these steps:

1. Go to **Credit Invoices** tab.
2. Choose the Invoice to refund and press the **Refund** button.
3. Choose **Manually** Refund type.




Manually

Return money to your client by an agreed payment method and then set the Credit Invoice to the Paid status.



With Unpaid Invoice

Choose unpaid Invoices of the client to reduce the amount that he need to pay.



Add as credit

The money will be added to client's credit balance and he will be able to use them.

** The page will reload and display the **Credit Invoices** tab.*

*After money are returned to client the **Credit Invoice** can be set as **Paid**, for that:*

1. Click on the **Set to paid** button next to the **Credit Invoice**.



Credit Invoices

Search/Filter

3 Records Found, Page 1 of 1

Jump to Page: 1 ▾

Invoice # ▾	Client Name	Invoice Date	Due Date	Total	Status	Refund Type	Action
88		13/03/2017	27/03/2017	-325.00	Unpaid	Manually	<input type="button" value="Refund"/> <input type="button" value="Set to paid"/>

2. Specify **Transaction ID** for the **Credit Invoice**.
3. Click on the **Set to paid** button.

To perform **Refund with Unpaid Invoice**, follow these steps:

1. Go to **Credit Invoices** tab.
2. Choose the Invoice to refund and press the **Refund** button.
3. Choose **With Unpaid Invoice** Refund type.
4. Check **Unpaid Invoice(s)** that you want to pay.

** If the amount of Unpaid Invoice is less than the Credit Invoice, then you can choose how to refund the rest by selecting one of the options on the bottom: **Add the rest to client's Balance in WHMCS** or **Refund the rest manually**.*

Refund with Unpaid Invoice

Amount to refund: 175 Euro

<input type="checkbox"/>	Invoice # ▾	Due Date	Status	Amount	Amount left	Refund Amount
<input type="checkbox"/>	86	29/03/2017	Unpaid	1202.00	1202.00	<input type="text" value="0"/>
<input type="checkbox"/>	93	29/03/2017	Unpaid	962.00	962.00	<input type="text" value="0"/>

- Add the rest to client's Balance in WHMCS
- Refund the rest manually

5. Choose some option of refund the rest.
6. Click on the **Refund** button.
7. Specify **Transaction ID** for **Credit Invoice** and chosen **Unpaid Invoices**.
8. Click on the **Set to paid** button.

** After page reloads, User is redirected to the **Credit Invoices** tab.*



To perform **Refund** as **Adding to Client's Credit Balance**, follow these steps:

1. Go to **Credit Invoices** tab.
2. Choose the Invoice to refund and press the **Refund** button.
3. Choose **Add as credit** Refund type.
4. Specify **Transaction ID** for **Credit Invoice**.
5. Click on the **Set to paid** button.

* The page will reload and display the **Credit Invoices** tab.

3.3 Archive tab

All **Credit Invoices** which were refunded are available in the **Archive** tab.

Archive

Search/Filter

3 Records Found, Page 1 of 1 Jump to Page: 1 ▾

Invoice # ▾	Client Name	Invoice Date	Due Date	Total	Status	Refund Type
95		15/03/2017	29/03/2017	-1100.00	Paid	Manually
94		15/03/2017	29/03/2017	-224.00	Paid	Unpaid Invoice
85		13/03/2017	27/03/2017	-325.00	Paid	Add as Credit

