PROBEGIN

Creating Connections

User manual

# Multi Invoice Reminder Module

## Revision history

| Date | Description of Change |
| --- | --- |
| March, 29 2017 | v. 0.1 Initial Draft |
| | |

# Table of Contents

# 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:

- Create credit invoices offhand;
- Keep track of the credited invoices;
- Search through the invoices and manage them accordingly;
- Get an administration right.

## 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

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

# 2. GETTING STARTED

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

## 2.1 Activate the Module

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

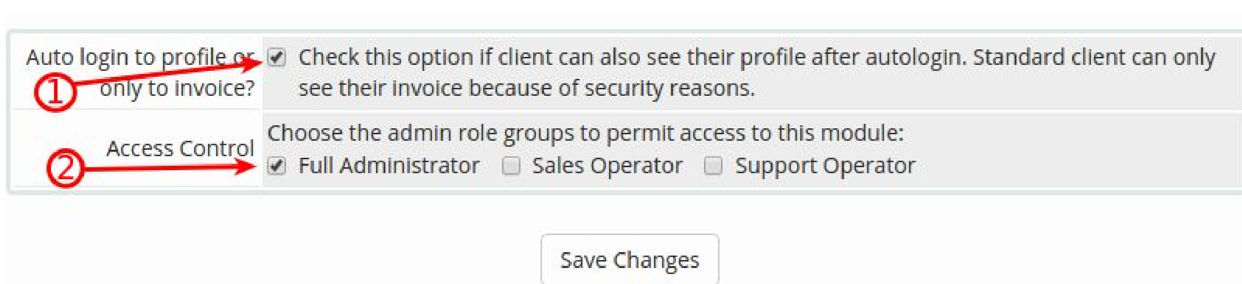
1. Hover the **Setup** tab.
2. Click on the **Addon Modules**.
3. Click on the **Activate** button near the **Multi Invoice Reminder**.


4. Click on the **Configure** button.
5. Check option **Full Administrator** in **Access Control** section.
6. Click on the **Save Changes** button.

## 2.2 Configure the module

User 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.




3. Check option **2 (Full Administrator)** in **Access Control** section.
4. 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 **Multi Invoice Reminder**.
3. Go to **Settings** tab.
4. 1) When you want to continue work with **Basic Mode:**

- Fill in **License Key** field and choose **Addon language**.
- Click on the **Save Settings** button.


2) When you want to work with **Advanced Mode:**
   - click on the **Switch to Advanced** button;
   - Fill in **License Key** field and choose **Addon language**;
   - Enter **Expiration period** and **Notes for multi-invoices**;
   - Click on the **Save Settings** button.

5. Invoices Reminder

** Congratulations! Your Multi Invoice Reminder  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.*

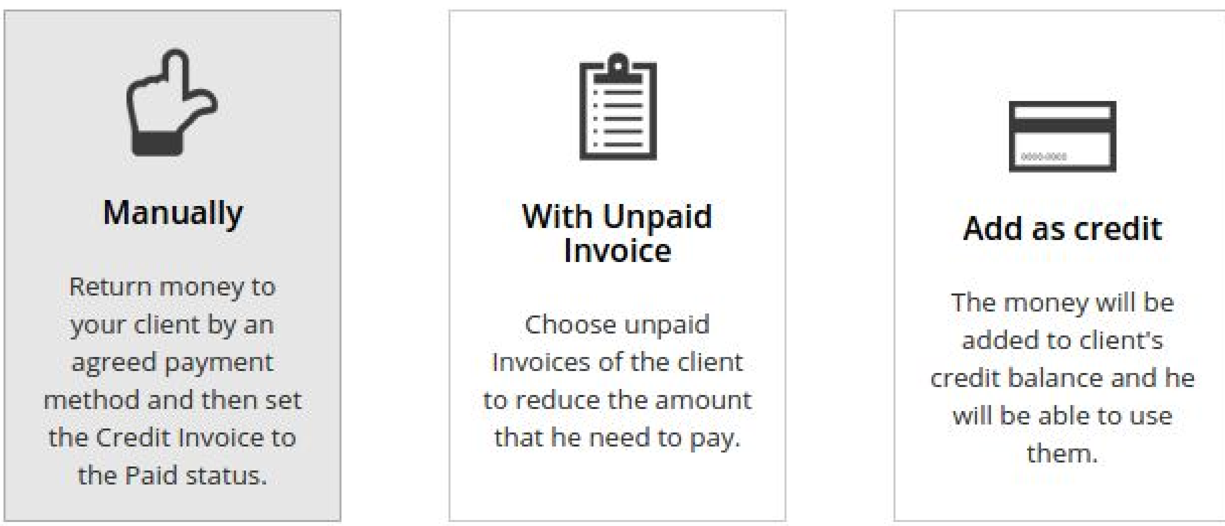
## 3.2 Refund Credit Invoice

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.

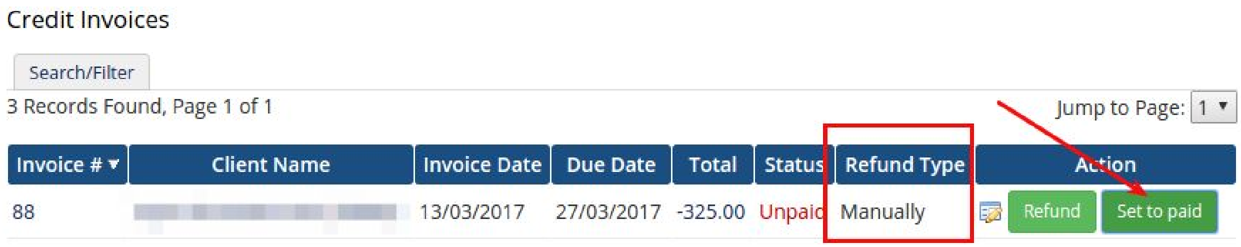
To perform **Manual Refund**, follow these steps:

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




** 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**.




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

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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****.*


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 | [illegible] | 15/03/2017 | 29/03/2017 | -1100.00 | Paid | Manually |
| 94 | [illegible] | 15/03/2017 | 29/03/2017 | -224.00 | Paid | Unpaid invoice |
| 85 | [illegible] | 13/03/2017 | 27/03/2017 | -325.00 | Paid | Add as Credit |