

WHMCS Credit module: Userguide

Introduction

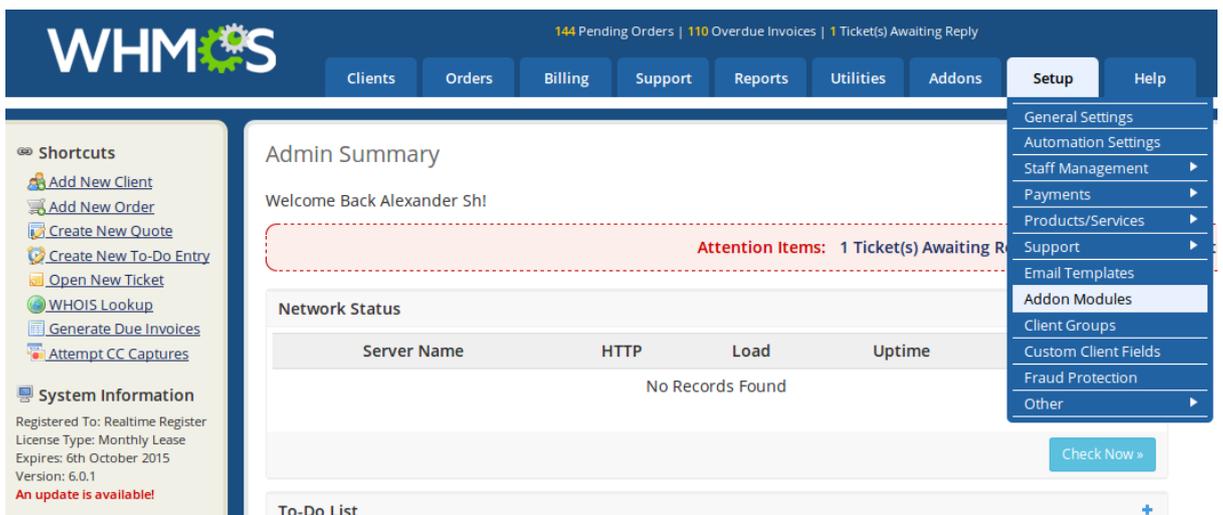
Insert text from advertisement

Functionality

Userguide

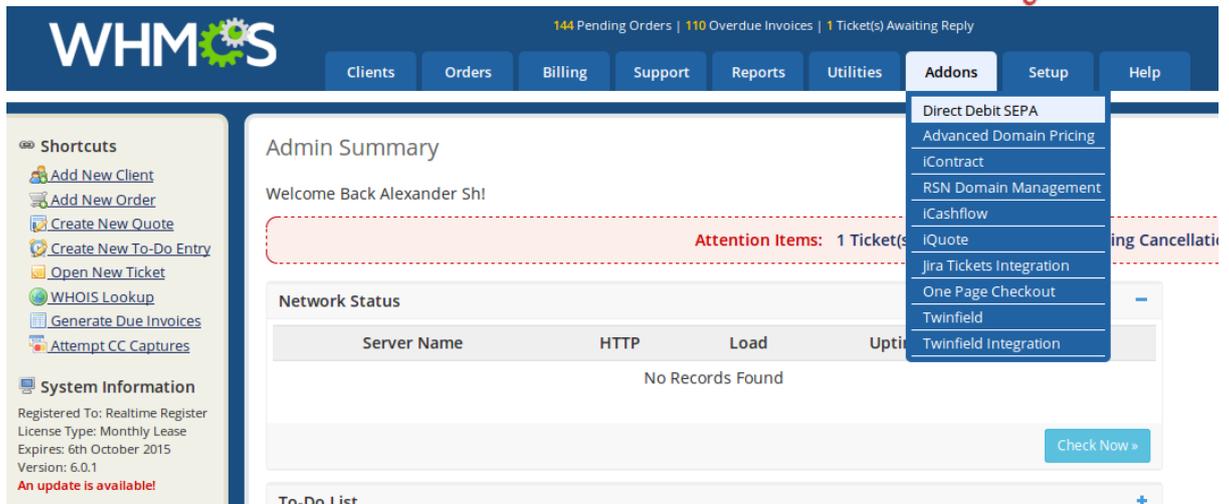
Installing and activating Credit Module Generator module

1. Unzip and upload this folder into **modules/addons** directory of WHMCS installation.
2. **Login** in the administrator area of your WHMCS.
3. Hover the menu item "**Setup**" and click the sub menu item "**Addon Modules**".



The screenshot shows the WHMCS Admin Panel interface. At the top, there is a navigation bar with the WHMCS logo and a status bar indicating 144 Pending Orders, 110 Overdue Invoices, and 1 Ticket(s) Awaiting Reply. The main navigation menu includes Clients, Orders, Billing, Support, Reports, Utilities, Addons, Setup, and Help. The Setup menu is open, showing options like General Settings, Automation Settings, Staff Management, Payments, Products/Services, Support, Email Templates, Addon Modules (highlighted), Client Groups, Custom Client Fields, Fraud Protection, and Other. The main content area displays an Admin Summary for Alexander Sh! with a welcome message and a red dashed box highlighting 'Attention Items: 1 Ticket(s) Awaiting Reply'. Below this is a Network Status table with columns for Server Name, HTTP, Load, and Uptime, showing 'No Records Found'. A 'Check Now' button is visible next to the table. On the left, there is a Shortcuts section with links for Add New Client, Add New Order, Create New Quote, Create New To-Do Entry, Open New Ticket, WHOIS Lookup, Generate Due Invoices, and Attempt CC Captures. Below that is System Information showing registration details and a note that an update is available.

4. Search for the **addon** you just uploaded and hit the **Activate** button on the right side.
5. Choose the admin role "groups" to permit access to this module.
6. Now check the "**Addons**" section and find the module you have just installed.

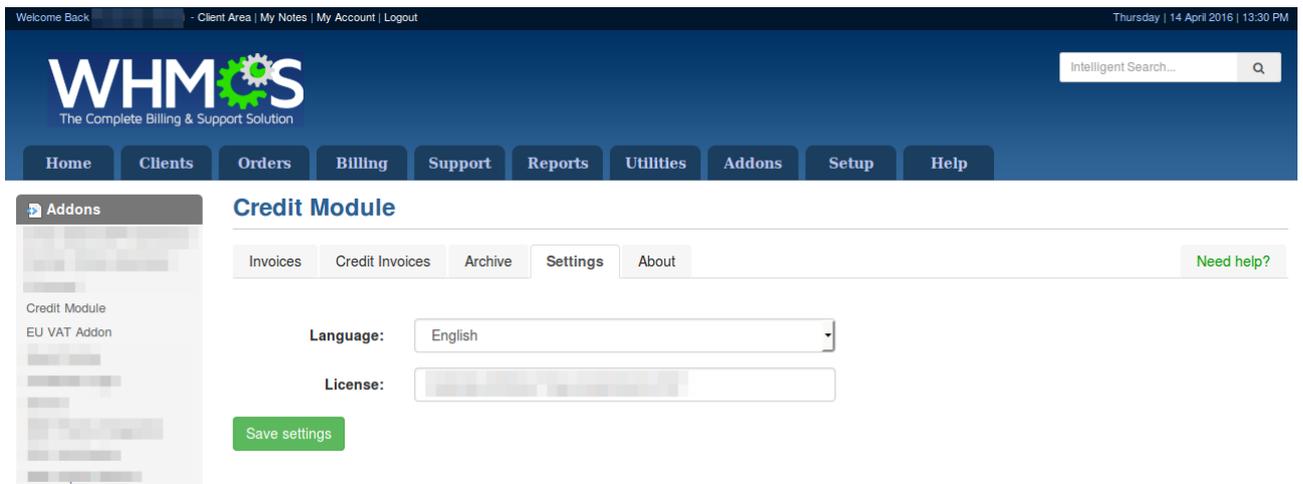


The screenshot shows the WHMOS Admin Summary page. At the top, there are navigation tabs: Clients, Orders, Billing, Support, Reports, Utilities, Addons, Setup, and Help. The 'Addons' tab is selected, and a dropdown menu is open, listing various add-ons such as Direct Debit SEPA, Advanced Domain Pricing, iContract, RSN Domain Management, iCashflow, iQuote, Jira Tickets Integration, One Page Checkout, Twinfield, and Twinfield Integration. The main content area displays 'Admin Summary' with a welcome message for Alexander Sh! and a notification for 'Attention Items: 1 Ticket(s) Awaiting Cancellation'. Below this is a 'Network Status' table with columns for Server Name, HTTP, Load, and Uptime, showing 'No Records Found'. A 'Check Now' button is present. On the left, there is a 'Shortcuts' section with links like 'Add New Client', 'Add New Order', 'Create New Quote', 'Open New Ticket', 'WHOIS Lookup', 'Generate Due Invoices', and 'Attempt CC Captures'. A 'System Information' section shows details like 'Registered To: Realtime Register', 'License Type: Monthly Lease', 'Expires: 6th October 2015', and 'Version: 6.0.1', with a note 'An update is available!'. A 'To-Do List' section is also visible at the bottom.

7. Enter the license key in Settings to use all the features within this module.

Configuration settings

While entering the license key, you can also set the language of the module.



The screenshot shows the 'Credit Module' settings page in WHMOS. The page has a navigation bar with tabs: Invoices, Credit Invoices, Archive, Settings, and About. The 'Settings' tab is active. The main content area includes a 'Language' dropdown menu set to 'English' and a 'License' text input field. A green 'Save settings' button is located below the license field. On the left, there is a sidebar with a list of add-ons, including 'Credit Module' and 'EU VAT Addon'. The top of the page shows the WHMOS logo and a search bar. The bottom of the page has a navigation bar with tabs: Home, Clients, Orders, Billing, Support, Reports, Utilities, Addons, Setup, and Help.

Create Credit Invoice

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

Tab **Invoices** is showing the list of Invoices that can be refunded (Paid and Unpaid).

Credit Module

Invoices Credit Invoices Archive Settings About Need help?

Invoice

Search/Filter
162 Records Found, Page 1 of 9 Jump to Page: 1 Go

<input type="checkbox"/>	Invoice #	Client Name	Invoice Date	Due Date	Total	Payment Method	Status
<input type="checkbox"/>	589		2016-04-13	2016-05-13	1.00	banktransfer	Unpaid
<input type="checkbox"/>	587		2016-04-12	2016-05-12	1.00	banktransfer	Unpaid
<input type="checkbox"/>	584		2016-04-12	2016-05-12	1.00	banktransfer	Unpaid
<input type="checkbox"/>	582		2016-04-12	2016-05-12	1.00	banktransfer	Unpaid

1. Search for the Invoice using a **Search/Filter** on the left top over the table or switching the pages on the right top.
2. Choose the Invoice(s) that you want to refund. You can choose few Invoices of the same client.
3. After you have chosen the Invoice(s), press the button "**Create Credit Invoice**" on the bottom.
4. Check **Credit Invoice Creation** page. You can see Client's Name, Company and Amount to refund. You can see the product lines of the Invoice(s) below.

Invoices Credit Invoices Archive Settings About Need help?

Create credit Invoice for Invoice(s): 486, 488

Client name	(View Invoices)
Company	Probegin 123
Invoices amount	€129.00

Select product lines to add them to Credit Invoice or Enter Total sum to refund.

<input type="checkbox"/>	Product	Amount	Amount to refund	Taxed
<input checked="" type="checkbox"/>		€40.00	0	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>		€89.00	0	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Total			<input type="checkbox"/>
Sub Total:		€0.00		
21.00% VAT:		€0.00		
Total Due:		€0.00		

Select payment method for refund

Add notes to Credit Invoice

Create Credit Invoice

5. Set the amount per line to refund or choose Total line and add your own description. You can set any amount to refund.
6. You can choose if the product was taxed or not. If taxed, the tax will be shown on the bottom.
7. Choose the payment method.
8. Add notes for the Invoice
9. Press the button "**Create Credit Invoice**". This action will create the Invoice and will lead to the tab "**Credit Invoices**".

Refund Credit Invoice

When the Invoice is created, you can Refund it on **Credit Invoices** tab. Refund can be done in 3 ways: **Manually, With Unpaid**



Invoices of the client or by **Adding as Credit** to the client's profile.

Manually

1. Choose the Invoice to refund and press the button "**Refund**".
2. On the page with 3 icons, choose "**Manually**".

Credit Module

Invoices | **Credit Invoices** | Archive | Settings | About

Refund Invoice 591

Choose 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

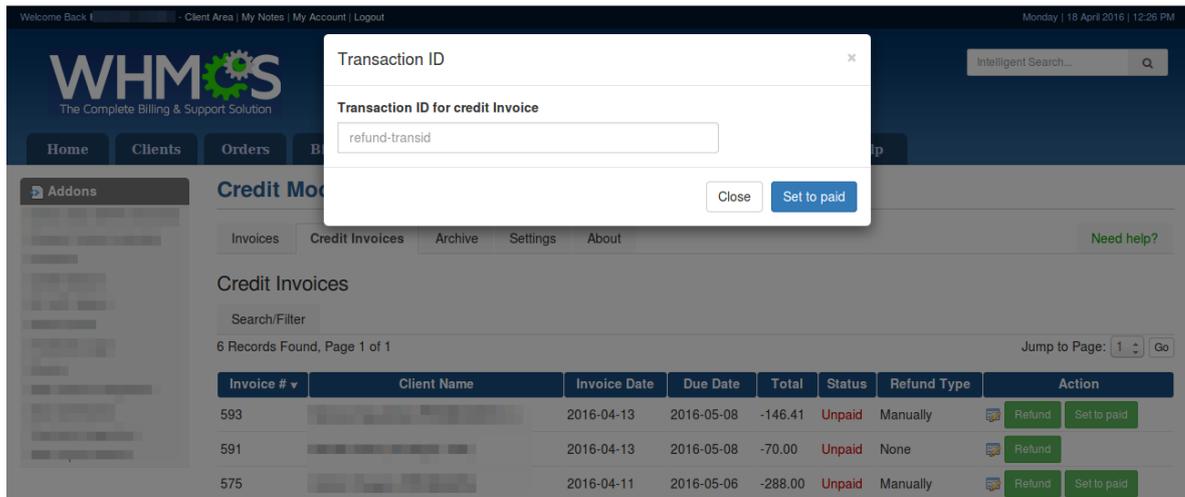
Choose unpaid Invoices of the client to reduce the amount that he need to pay.



Add as credit

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

3. You will be redirected back to the "**Credit Invoices**" tab and Invoice will obtain Refund type "**Manually**".
4. When you have returned the money back to a client, you can **Set Invoice to paid** by pressing the corresponding button near "**Refund**".
5. Enter the **Transaction ID** for the Credit Invoice.



The screenshot shows the WHMOS interface with a modal dialog open. The dialog is titled 'Transaction ID' and contains a text input field with the value 'refund-transid'. Below the input field are two buttons: 'Close' and 'Set to paid'. In the background, the 'Credit Invoices' table is visible with the following data:

Invoice #	Client Name	Invoice Date	Due Date	Total	Status	Refund Type	Action
593		2016-04-13	2016-05-08	-146.41	Unpaid	Manually	Refund Set to paid
591		2016-04-13	2016-05-08	-70.00	Unpaid	None	Refund
575		2016-04-11	2016-05-06	-288.00	Unpaid	Manually	Refund Set to paid

6. Invoice's status will be changed to **Paid** and it will be shown in the **Archive** tab.

With Unpaid Invoice

1. Choose the Invoice to refund and press button "**Refund**".
2. On the page with 3 icons, choose "**With Unpaid Invoice**".
3. There will be all **Unpaid Invoice(s)** of the Client loaded below the icons.



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.

Refund with Unpaid Invoice

Amount to refund: 400 Euro

<input type="checkbox"/>	Invoice # ▾	Due Date	Status	Amount	Amount left	Refund Amount
<input type="checkbox"/>	287	2016-04-21	Unpaid	873.80	873.80	0
<input type="checkbox"/>	289	2016-04-21	Unpaid	114.00	114.00	0
<input type="checkbox"/>	299	2016-04-24	Unpaid	288.00	288.00	0
<input type="checkbox"/>	304	2016-04-24	Unpaid	97.69	97.69	0

Add the rest to client's Balance in WHMCS

Refund the rest manually

Refund

- Choose the amount to pay per Invoice. If the **Credit Invoice** is bigger then the chosen Invoice(s), you can put the rest of the amount on another **Unpaid Invoice**.
- If the amount of **Unpaid Invoice** is lesser 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.
- Press button "**Refund**" on the bottom.
- Enter the **Transaction ID** for the **Credit Invoice** and for the **Unpaid Invoice(s)** that you selected to use for refund.
- If you chose "Add the rest to client's Balance in WHMCS", the Invoice will be moved to the **Archive** tab. The difference will be added to client's **Credit Balance**.
If you chose "Refund the rest manually", the Invoice will stay on the tab Credit Invoices with the button "**Set to Paid**".
If there were no amount left, the Invoice will be moved to the Archive tab.

Add as Credit

- Choose Invoice to refund and press button "**Refund**".
- On the page with 3 icons, choose "**Add as Credit**".
- Enter the **Transaction ID** for the **Credit Invoice**.
- The Invoice will be moved to the **Archive** tab and amount of Invoice will be added to the client's **Credit Balance**.

Archive tab

On the **Archive** tab you can see the list of all **Credit Invoices** with statuses and refund types would be able to change status to paid on this page. Search through the items using a filter or by switching between pages.



Creating Connections

Credit Module

Invoices Credit Invoices Archive Settings About

[Need help?](#)

Invoice

Search/Filter

104 Records Found, Page 1 of 6

Jump to Page:

Invoice # ▼	Client Name	Invoice Date	Due Date	Total	Status	Refund Type
593	[REDACTED]	2016-04-13	2016-05-08	-146.41	Paid	Manually
588	[REDACTED]	2016-04-12	2016-05-07	-121.00	Paid	Manually
586	[REDACTED]	2016-04-12	2016-05-07	-22.10	Paid	Unpaid invoice

