WHMCS Credit module: Userguide

Introduction

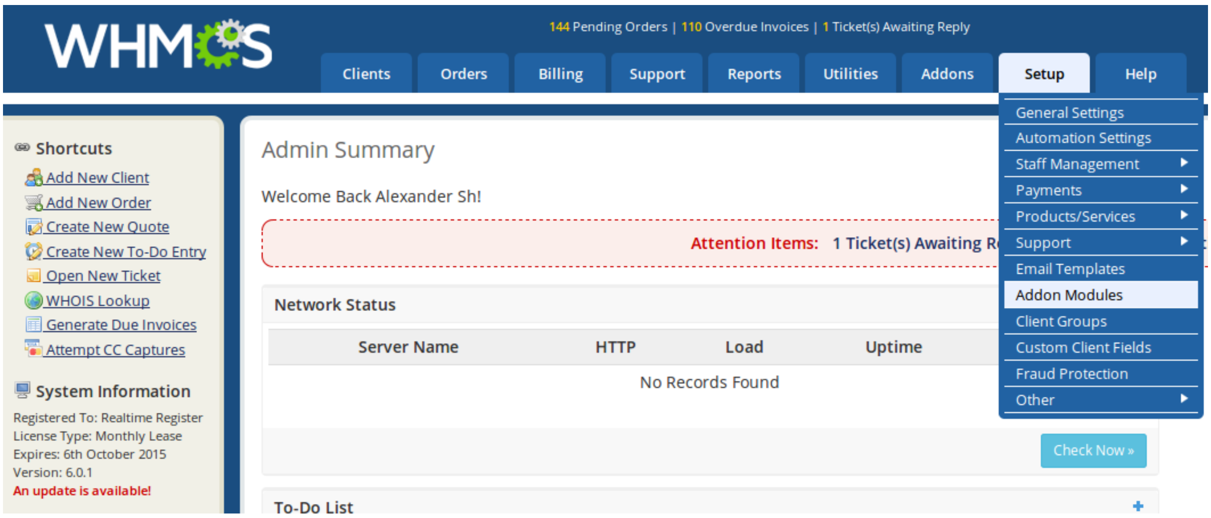
Insert text from advertisement

Functionality

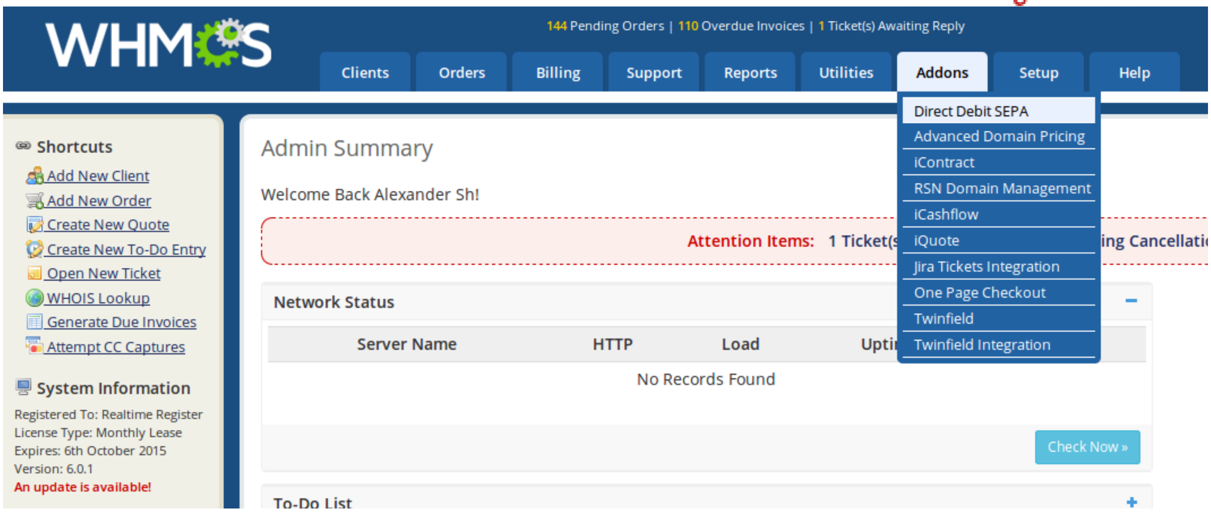
Userguide

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"**.



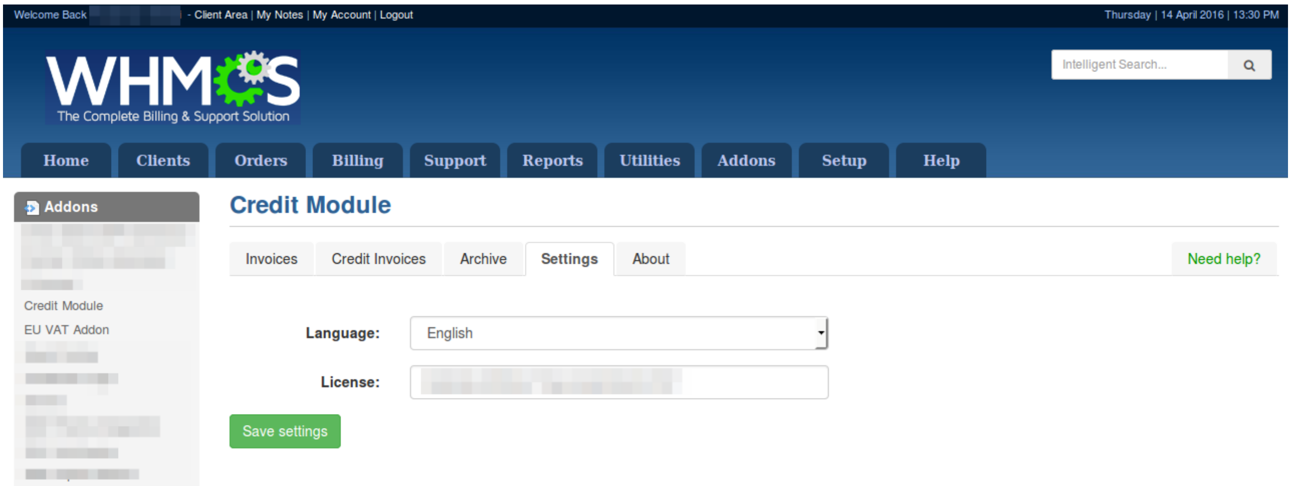
4. Search for the **addon** you just uploaded and hit the **Activate** button on the right side.
5. Choose the admin role “groups” to permit access to this module.
6. Now check the **"Addons"** section and find the module you have just installed.



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.



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).

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Creating Connections

Credit Module

Invoices | Credit Invoices | Archive | Settings | About | Need help?

Invoice

Search/Filter

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	Invoice #	Client Name	Invoice Date	Due Date	Total	Payment Method	Status
☐	589	[redacted]	2016-04-13	2016-05-13	1.00	banktransfer	Unpaid
☐	587	[redacted]	2016-04-12	2016-05-12	1.00	banktransfer	Unpaid
☐	584	[redacted]	2016-04-12	2016-05-12	1.00	banktransfer	Unpaid
☐	582	[redacted]	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	[redacted] (View Invoices)
Company	Probegin 123
Invoices amount	€129.00

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

	Product	Amount	Amount to refund	Taxed
☑	[redacted]	€40.00	0	☑
☑	[redacted]	€89.00	0	☑
☐	Total			☐
	Sub Total:	**€0.00**		
	21.00% VAT:	€0.00		
	Total Due:	**€0.00**		

Select payment method for refund: Bank Transfer

Add notes to Credit Invoice: Credit Invoice for Invoice(s): 486, 488

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"**.

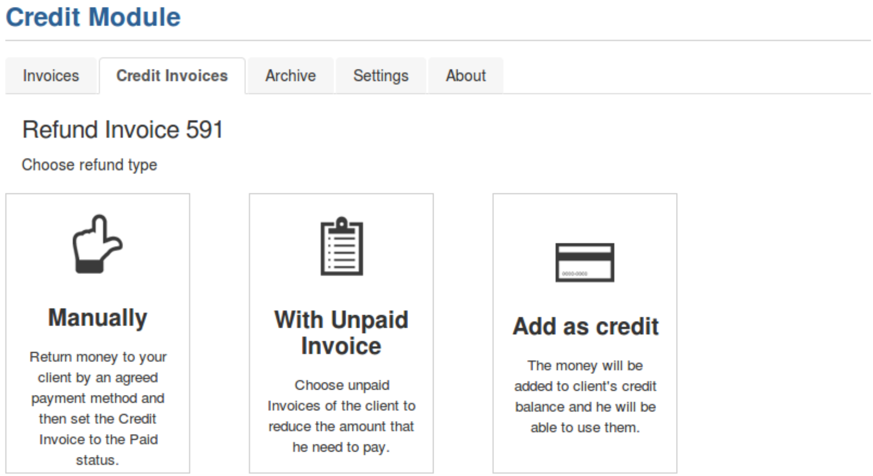
Refund Credit Invoice

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

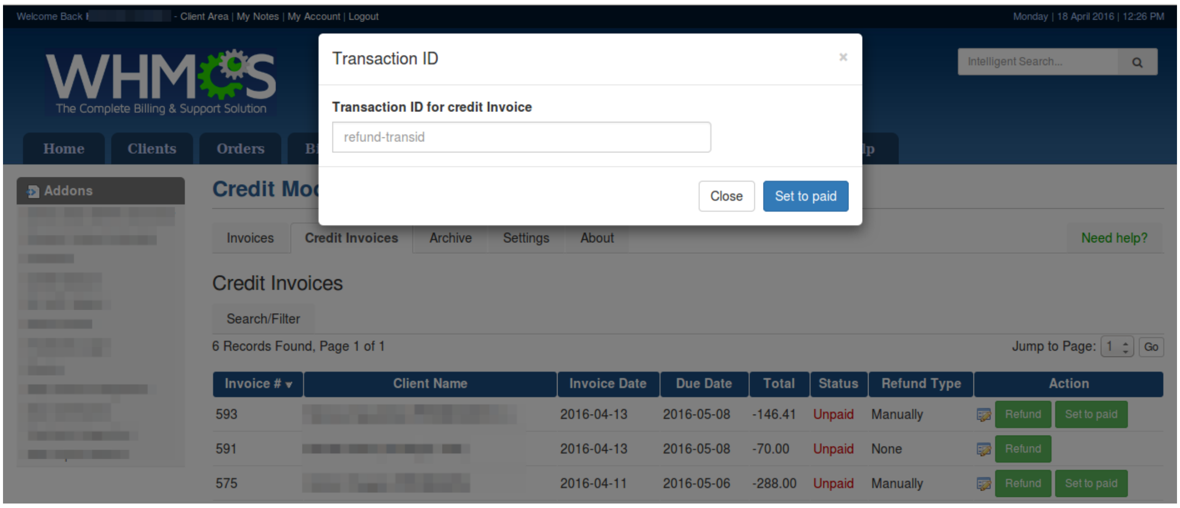
Invoices of the client or by **Adding as Credit** to the client's profile.

Manually

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



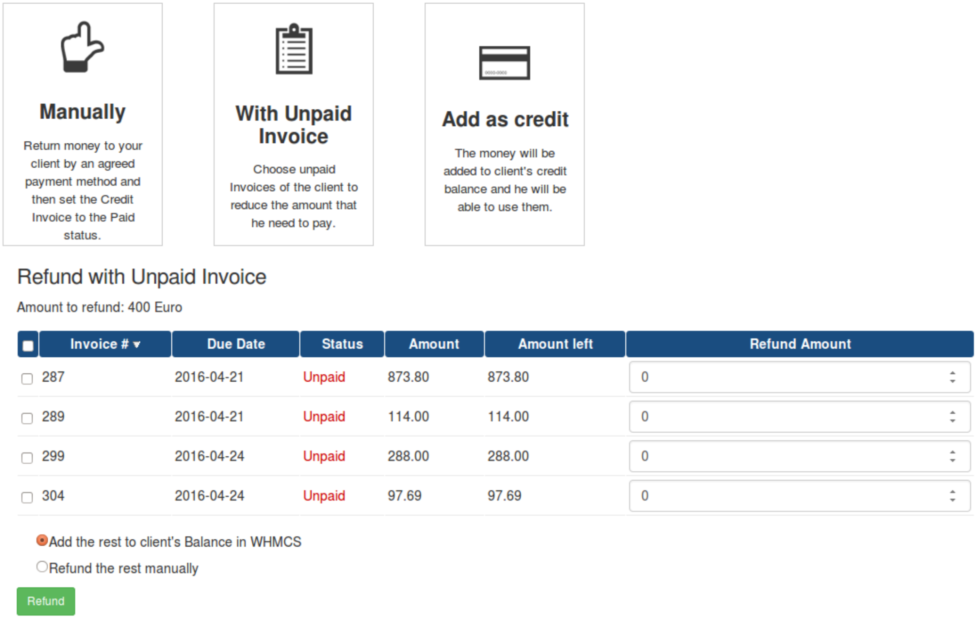
3. You will be redirected back to the **"Credit Invoices"** tab and Invoice will obtain Refund type **"Manually"**.
4. When you have returned the money back to a client, you can **Set Invoice to paid** by pressing the corresponding button near **"Refund".**
5. Enter the **Transaction ID** for the Credit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



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.



4. 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**.
5. 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.
6. Press button **"Refund"** on the bottom.
7. Enter the **Transaction ID** for the **Credit Invoice** and for the **Unpaid Invoice(s)** that you selected to use for refund.
8. 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

1. Choose Invoice to refund and press button **"Refund"**.
2. On the page with 3 icons, choose **"Add as Credit"**.
3. Enter the **Transaction ID** for the **Credit Invoice**.
4. 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.

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Credit Module

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Invoice

Search/Filter

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