



AutoCredit for WHMCS

User Manual

Thank you for ordering our addon, and we hope that it meets all your requirements!

Leave a Review on WHMCS Marketplace:

<https://marketplace.whmcs.com/product/5917>

v2.2.2



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Overview:

As you know, in WHMCS by default, the “*Automatic Credit Use*” option on new invoices can only be disabled or enabled system-wide for all clients universally, and cannot be adjusted on a per-client basis. In addition to that, only admins can control this option.

However, in certain scenarios, some clients have more than one active service on their accounts (such as freelancers and agencies who handle billing on their customers' behalf), so they don't want all of the services to renew automatically as a result of 'Automatic Credit Use' before first getting payments from their end-customers. On the other hand, some clients may want to have Automatic Credit Use for their renewal invoices by default.

AutoCredit for WHMCS gives your clients more control over how their credit balance is used, by enabling only specific services renewal invoices to be paid from account credits automatically.

This is very useful for WHMCS users who serve resellers and clients that manage hosting services on behalf of their end users, because the reseller may wish to have only the services that he owns to be automatically renewed from the account credits, while not automatically applying from that credit on the other services until they get paid by their end users first.

Features:

- Allow clients to enable automatic credit usage on invoices of specific services only.
- Notify client when the credit applied to invoice is not enough to pay it.
- Display auto-credit status in services details page.
- Admin section to display clients list and the "Separate Invoices" option status for each client.
- Ability for admin to enable "Separate Invoices" option for new clients by default.
- Ability for admin to enable "Separate Invoices" option for all clients by one-click.
- Better track activities, by logging actions.
- Translation ready.

In this document, you will find step-by-step instructions on how to get started with it.

Requirements:

- WHMCS 7.10 and above
- PHP 7.2+
- IonCube Loaders 10.2.0 or later

Considerations:

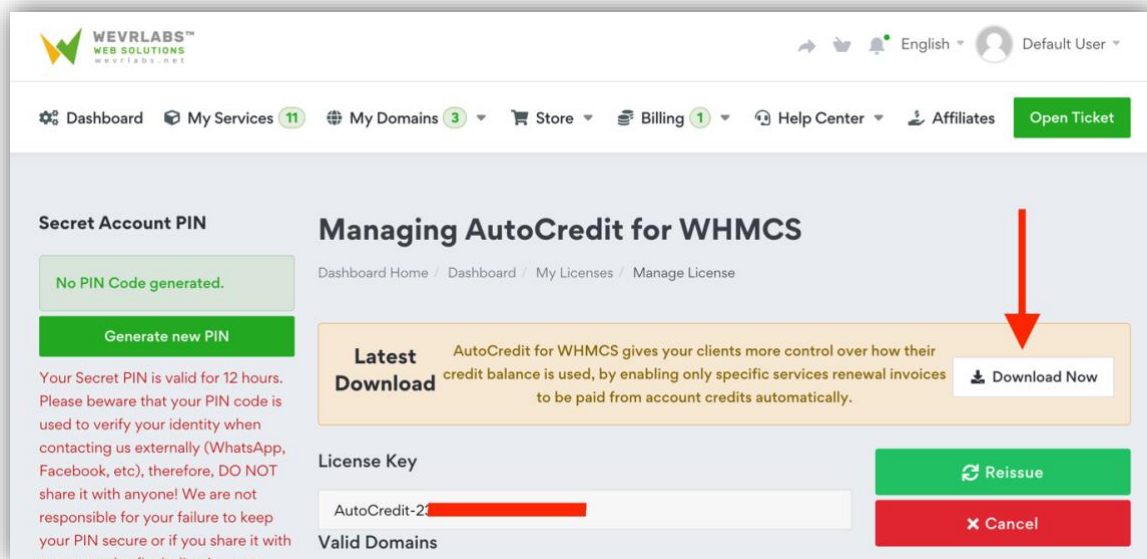
In order for the addon to work as should, the following consideration must be taken into account:

- WHMCS "*Separate Invoices*" option must be **ENABLED** for the client in order for auto-credit settings to take effect. That's because when it is disabled, the default behavior for WHMCS is to generate a single invoice for all the services sharing the same due date, making it not possible for AutoCredit to work on such type of invoices. As such, if a client has this option disabled, no actions will be taken by the addon for their services. Also, an alert when displayed for them when visiting the addon's client area page, stating that AutoCredit settings will have no effect while the "*Separate Invoices*" option is disabled. A section in the addon admin area allows you to handle this setting for all the clients in your system.
- Of course, WHMCS "*Automatic Credit Use*" setting must be disabled for this addon settings to be in effect, otherwise, if it is enabled, then WHMCS will automatically settle any newly generated invoice from credits regardless of the type of this invoice. The first time the addon is activated, it will disable this option automatically.
- Currently addon services invoices are not supported. Invoices for these types of services should be paid manually when they are generated.
- If a client has a service with a renewal invoice already generated for it, enabling automatic credit usage for this service will not affect the already generated invoice. The client should still make payment for that invoice manually (either from credit balance or via another payment gateway).

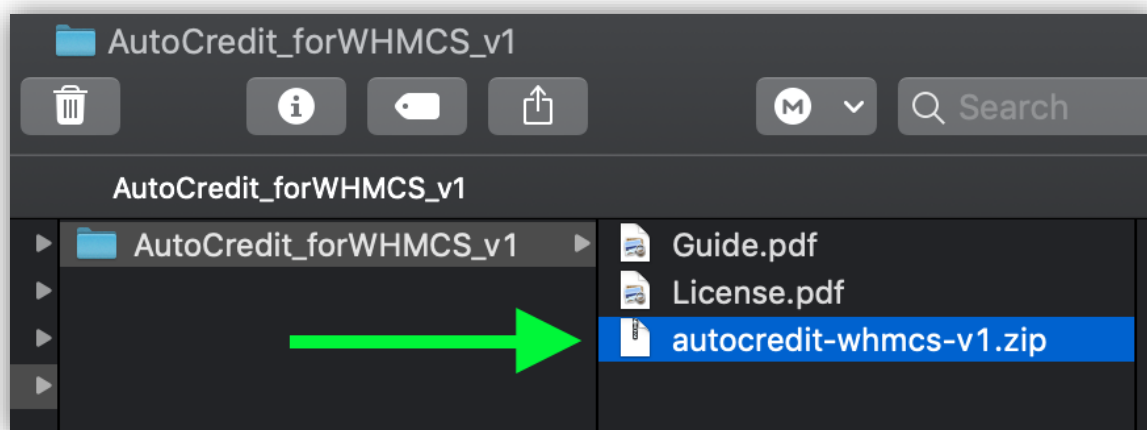
Installing the Addon:

The first step is to upload and activate the addon on your WHMCS install.

Start by downloading the addon package. Go to the service details page in your account at <https://dash.wevrlabs.net/> the latest package:



After downloading and extracting the package *zip* file, you should end up with a folder like this:



What you need here is the **autocredit-whmcs-v1.zip** file. Upload this file as it is and extract it while it is uploaded to your WHMCS' addons folder. That is:

/path/to/whmcsfolder/modules/addons

(If updating, make sure to confirm that the extraction will replace the current "autocreditusage" folder contents).


Activation:

To activate the addon, navigate to:

Configuration > System Settings > Addon Modules

for WHMCS versions prior to v8: **Setup > Addon Modules**


and Click on “Activate”

Module	Version	Author	
» Addon Module Sample This module provides an example WHMCS Addon Module which can be used as a basis for building a custom addon module.	1.0	Your name goes here	Activate Deactivate Configure
» AutoCredit for WHMCS This module empowers WHMCS credit functionality, by allowing your clients to enable the renewal invoices of specific services to be paid from account credits automatically. The addon requires the option "Seaprate Invoices for Services" to be enabled for clients, and also the system's setting "Automatic Credit Use" to be set to "OFF" in order to work as should.	1.0	 WEVRLABS™ WEB SOLUTIONS wevr labs . net	Activate Deactivate Configure

After that, basic addon settings will appear:

» AutoCredit for WHMCS
This module empowers WHMCS credit functionality, by allowing your clients to enable the renewal invoices of specific services to be paid from account credits automatically. The addon requires the option "Seaprate Invoices for Services" to be enabled for clients, and also the system's setting "Automatic Credit Use" to be set to "OFF" in order to work as should.

1.0

 WEVRLABS™
WEB SOLUTIONS
wevr labs . net

Activate Deactivate Configure

License Key

..... Enter your License Key here

License Status: ACTIVE

Delete Addon Settings

☐ check this box if you wish to delete all the addon database tables upon Deactivate command (BE CAREFUL WITH THIS! enabling this option will clear all the settings of the addon and also the auto credit settings your clients set for their services)

Separate Invoices by Default

☒ check this box if you wish to enable "Separate Invoices" option by default for new clients

Access Control

Choose the admin role groups to permit access to this module:
☒ Full Administrator ☐ Sales Operator ☐ Support Operator

Save Changes

License Key: obtain your license key from our website, and then enter it here.

Delete Addon Settings: it is recommended to leave this option unchecked, because if you activate it, once you deactivate the addon, it will clear all its database tables, including your clients auto-credit preferences.

Separate Invoices by Default: enabling this option will activate the “Separate Invoices” by default for all new clients.

Access Control: give permission to admins in order to be able to edit and modify settings of the addon.

Once done, click *Save Changes* button.

Addon Sections:

Now you can access the addon settings by going to

Addons > AutoCredit for WHMCS

The main section displays a list of all the services in the system, and options to edit auto-credit usage for each one.

The screenshot shows the WHMCS interface for the AutoCredit for WHMCS addon. The left sidebar contains the WHMCS logo, version 1.0, and navigation links for AutoCredit Settings, Separate Invoices, and Addons. The main content area displays a "Services List" table with columns for ID, Client, Product Name, Description, Status, Term, Next Due, and AutoCredit. The table lists 6 services, all with a status of "ACTIVE". The AutoCredit column shows "Enabled" for services 9 and 15, and "Disabled" for services 10, 11, 12, and 13. Each row has a "Toggle" button to switch the status. A search bar is located at the top right of the table. A green banner at the top of the main content area indicates "Settings saved successfully."

ID	Client	Product Name	Description	Status	Term	Next Due	AutoCredit
9	#2 - Another Client	Shared Hosting X	domain4444.com	ACTIVE	Monthly	2021-05-09	Enabled Turn Off
10	#1 - Test Client	Shared Hosting X	domain111111.com	ACTIVE	Monthly	2021-05-11	Disabled Activate
11	#1 - Test Client	Shared Hosting X	domain2222.com	ACTIVE	Monthly	2021-06-01	Disabled Activate
12	#1 - Test Client	Shared Hosting X	domain3333.com	ACTIVE	Monthly	2021-06-01	Disabled Activate
13	#1 - Test Client	Shared Hosting X	iohfiw.com	ACTIVE	Monthly	2021-05-05	Disabled Activate
15	#1 - Test Client	Shared Hosting X	neworderautocredit.com	ACTIVE	Monthly	2021-08-04	Enabled Turn Off

The second section is for reviewing "Separate Invoices" options for clients:

The screenshot shows the WHMCS interface for the AutoCredit for WHMCS addon, specifically the "Separate Invoices" Status section. The left sidebar is identical to the previous screenshot. The main content area displays the "Separate Invoices" Status section, which includes a description of the option and a table of client settings. The table has columns for ID, Client Name, Company, Email Address, and Separate Invoices. The table lists 2 clients, both with a status of "Enabled". Each row has a "Toggle" button to switch the status. A search bar is located at the top right of the table. A green banner at the top of the main content area indicates "Settings saved successfully."

ID	Client Name	Company	Email Address	Separate Invoices
1	Test Client	-	emaaaail@test.com	Enabled Turn Off
2	Another Client	-	emaaaail2222@test.com	Enabled Turn Off

Client area:

The screenshot shows the WHMCS client area interface. At the top, there's a navigation bar with links: Home, Services, Domains, Billing, Support, and Open Ticket. A search bar is also present. The user is logged in as 'Test Client'. The main content area is titled 'Automatic Credit Usage Settings'. It includes a yellow warning box about the development license. Below this, there's an 'Instructions' section with three bullet points explaining the automatic credit usage feature. A table lists 11 services, with the first three visible: '10 - Shared Hosting X', '11 - Shared Hosting X', and '12 - Shared Hosting X'. Each service has columns for Description, Term, Renewal Date, Amount, and Auto Credit status. The 'Auto Credit' column shows 'Enabled' for the first two and 'Disabled' for the third, with 'Turn Off' and 'Activate' buttons respectively.

1 Notifications

Logged in as: Test Client

WHMCS

Search our knowledgebase...

Home Services Domains Billing Support Open Ticket

Hello, Test!

Portal Home / Automatic Credit Usage Settings

Dev License: This installation of WHMCS is running under a Development License and is not authorized to be used for production use. Please report any cases of abuse to abuse@whmcs.com

Automatic Credit Usage allows the renewal invoices of specific services, to be paid automatically from your [Account Credit Balance](#).

Instructions:

- If you have a service with a renewal invoice already generated for it, enabling automatic credit usage for this service will not affect the already generated invoice. You will still have to make payment for that invoice manually (either from your account credits or via another payment gateway).
- By enabling automatic credit usage for renewal invoices of a specific service, you acknowledge that once credit has been used on a future renewal invoice for this service, then this credit is not subject to refunds or reversal.
- Currently domains invoices and addon services invoices are not supported. Invoices for these types of services should be paid manually when they are generated.

To **enable** or **disable** automatic credit usage for renewal invoices of a specific service, click the corresponding **Toggle** button.

Showing 1 to 10 of 11 entries

Service	Description	Term	Renewal Date	Amount	Auto Credit
10 - Shared Hosting X <small>ACTIVE</small>	domain111111.com	Monthly	2021-05-11	300 SDG	Enabled <small>Turn Off</small>
11 - Shared Hosting X <small>ACTIVE</small>	domain2222.com	Monthly	2021-06-01	300 SDG	Enabled <small>Turn Off</small>
12 - Shared Hosting X	domain3333.com	Monthly	2021-06-01	300 SDG	Disabled <small>Activate</small>

The addon will add navigation links to the default WHMCS menus:

This functionality relies on the default configuration for WHMCS menus. In other words, if you customized the menus in any way, the addon links may not appear as should.

The screenshot shows the 'Your Info' section of the WHMCS client area. A red arrow points from the 'Auto Credit Usage Settings' link in the left sidebar to the 'Dev License' warning box in the main content area.

WHMCS

Home Services Domains Billing Support Open Ticket

Your Info

Test Client
Stars
ny, New York
United States

Update

My Invoices
My Quotes
Mass Payment
Auto Credit Usage Settings

Dev License: This installation is not authorized to be used for production use.

The screenshot shows the 'Hello, Test!' dropdown menu in the WHMCS client area. A red arrow points from the 'Auto Credit Usage Settings' link in the dropdown menu to the 'Auto Credit Usage Settings' link in the left sidebar.

English Notifications NEW Logout

Hello, Test!

Account Details
User Management
Auto Credit Usage Settings
Contacts
Email History

Change Log:

Version 2.2.2 *May 20, 2023*

- Fix a conflict with another module.

Version 2.2.1 *May 20, 2023*

- Added support for WHMCS 8.7 and PHP8 (this version works only on PHP8 and IonCube v12).

Version 2.2.0 *March 25, 2022*

- Add option to disable partial credit usage on invoices when the amount of credit applied is less than the invoice total balance.
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Version 2.1.0 *Aug 10, 2021*

- Minor improvements.

Version 2.0.1 *July 25, 2021*

- Option to show only active services/domains in clientarea.

Version 2.0.0 *July 23, 2021*

- Added support for domains invoices.
- Display current client balance in settings page.
- Support more strings translations in Lang files.
- Numerous bug fixes and code improvements.

Version 1.2.2 *July 13, 2021*

- Minor improvements to code.

Version 1.2 *June 24, 2021*

- WHMCS 8.2 compatibility.
- Fixing some bugs.

Version 1.1 *June 20, 2021*

- Fixing some bugs.

Version 1.0 *May 5, 2021*

- Initial release.

