

# PAYMENTS & CURRENCY

# Table of Contents

- Taxes/VAT ..... 3
  - Enable Tax Charging ..... 4
  - Setup Tax Inclusive/Exclusive Settings ..... 5
- Multi-Currency..... 6
  - Selling in Multiple Currencies ..... 7
  - Automatically updating product prices ..... 10
- Invoices ..... 11
  - Changing my address on invoices ..... 12
  - Changing Payment Instructions on Invoices ..... 14
  - Fixing/Preserving Customer Invoice Data ..... 16
  - Creating a renewal invoice early ..... 17
  - Creating separate renewal invoices for a client's services..... 19
- Troubleshooting..... 22
  - Troubleshooting Payment Issues..... 23
  - Troubleshooting Client Details Display Issues on Invoices ..... 25

# Taxes/VAT

# Enable Tax Charging

# Setup Tax Inclusive/Exclusive Settings

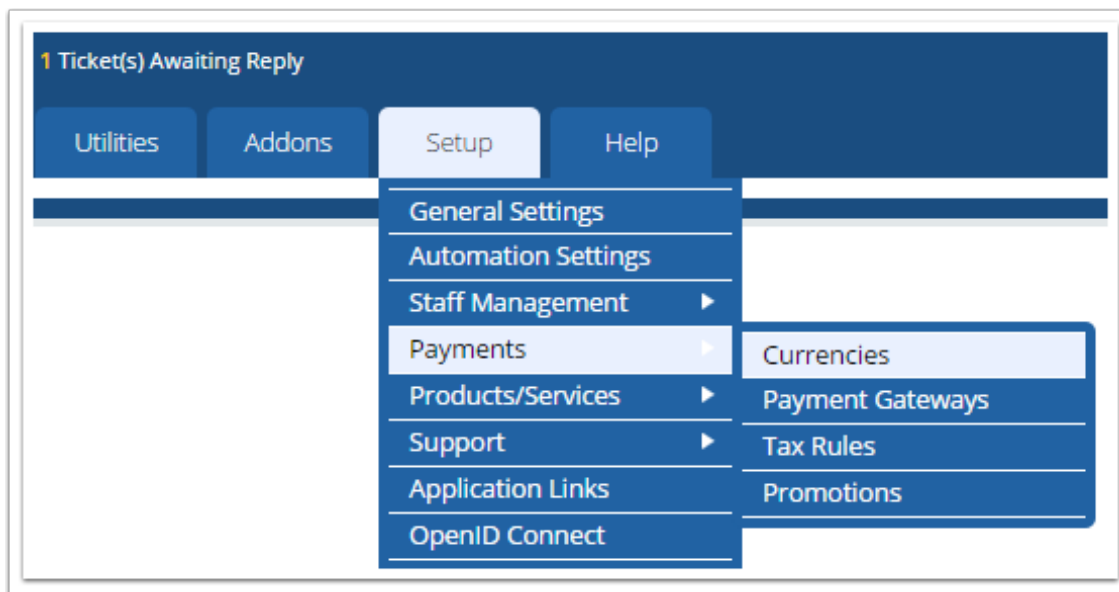
# Multi-Currency

# Selling in Multiple Currencies

WHMCS has the ability to sell a single in multiple currencies. The product price can be manually set differently in each currency, or automatically updated on a daily basis with exchange rate fluctuations.

## Add a new currency

Navigate to Setup > Payments > Currencies



Use the form at the bottom of the page to enter the details of the new currency you wish to add:

### Currencies

You can sell in different currencies concurrently by setting them up below. Customers who visit your site can

Currency Code	Prefix	Suffix	Format
USD	\$	USD	1234.56

Add Additional Currency

Currency Code  eg. USD, GBP, etc...

Prefix

Suffix

Format




Base Conv. Rate  The current rate to convert to base currency


Click Add Currency

## Set product prices - Automatic Conversion

WHMCS can automatically calculate the price for products in the new currency based upon the existing price in the base currency.

Click the *Update Product Prices* button

Currency Code	Prefix	Suffix	Format	Base Conv. Rate	
GBP	£		1234.56	0.80000	 
USD	\$	USD	1234.56	1.00000	



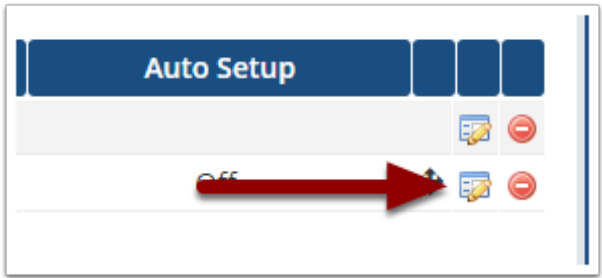
In this example, a price in GBP would be calculated based upon the existing USD price.

## Set product prices - Manual Entry

To specify fixed prices manually, navigate to **Setup > Products/Services > Products/Services**

Click the *Edit* icon next to your product:





Select the *Pricing* tab

- 1. Tick the *Enable* checkbox in the row of your newly added currency (in this example GBP)
- 2. Enter the price in the new currency you wish to charge for this product

Products/Services

Edit Product

Details Pricing Module Settings Custom Fields Configurable Options

Payment Type ☐ Free ☐ One Time ☒ Recurring

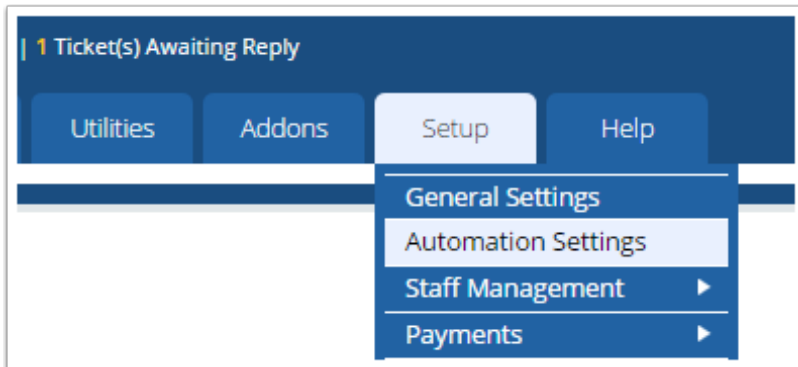
Currency		One Time/Monthly	Quarterly
GBP	Setup Fee	0.00	
	Price	7.00	2
	Enable	<input checked="" type="checkbox"/> 1	<input type="checkbox"/>
USD	Setup Fee	0.00	
	Price	10.00	
	Enable	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Click *Save Changes*

# Automatically updating product prices

WHMCS has the built in capability to automatically obtain currency exchange rates, this can be used to automatically update product prices on a daily basis in line with currency fluctuations.

Navigate to Setup > Automation Settings



Scroll down to the *Currency Auto Update Settings* section

1. Tick the *Exchange Rates* checkbox
2. Tick the *Product Prices* checkbox

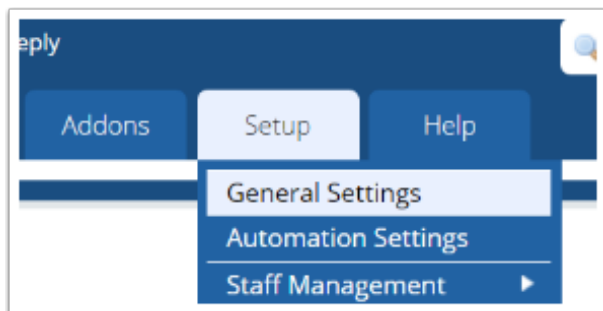
A screenshot of the 'Currency Auto Update Settings' section in the WHMCS interface. The section is titled 'Currency Auto Update Settings' and contains two checkboxes. The first checkbox is labeled 'Exchange Rates' and is checked. The second checkbox is labeled 'Product Prices' and is also checked. Below these checkboxes, there is a section titled 'Domain Reminder Settings'. In this section, there is a label 'First Renewal Notice' followed by a text input field containing the number '30'. To the right of the input field, there is a label 'Enter the number of days' and a dropdown menu with the word 'before' and a downward arrow. There are two circular callout boxes with numbers '1' and '2' pointing to the 'Exchange Rates' and 'Product Prices' checkboxes respectively.

Click *Save Changes*

# Invoices

# Changing my address on invoices

Navigate to Setup > General Settings > General tab



Enter your new address in the *Pay To Text* field

A screenshot of a software settings form. The form has two main sections. The top section is labeled 'Logo URL' and contains a text input field with the value '//v71.test.whmcs.rocks/whmcs/assets/img/logo.png'. Below this is a label 'Pay To Text' and a larger text input field. This field contains the address: '123 Test Street, Test Town, Testville, T12 4CB'. The text 'Testville' and 'T12 4CB' are underlined. A red rectangular box highlights the entire 'Pay To Text' input field. Below the input field, there is a small text label that says 'This text is displayed on the invoice as the Pay To details'.

Click *Save Changes*

The new address is now displayed on invoices.

**UNPAID**

## Invoice #2

Due Date: Tuesday, December 27th,  
2016

 Pay Now

### Invoiced To:

Client Test  
123 Test Street,  
Houston, Texas, 70077  
United States

### Pay To:

123 Test Street,  
Test Town  
Testville  
T12 4CB

### Payment Method:

Stripe ▼

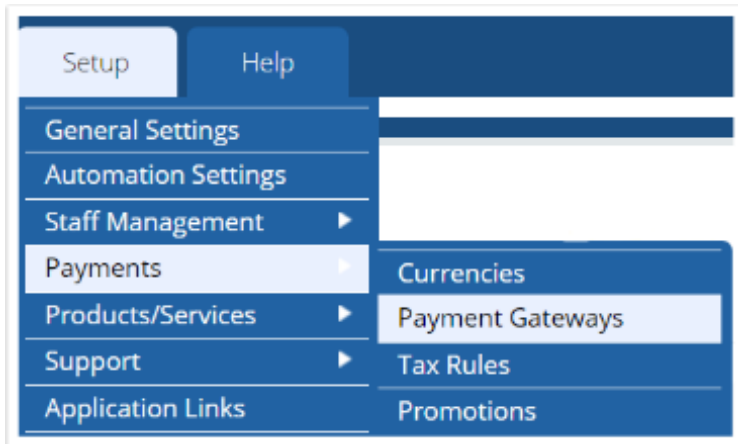
### Invoice Date:

Tuesday, December 27th, 2016

# Changing Payment Instructions on Invoices

Invoices assigned to the *Mail in Payment* and *Bank Transfer* payment gateway modules will display payment instructions on invoices. To change these instructions:

Navigate to Setup > Payments > Payment Gateways > Manage Existing Gateways



Scroll down to the *Bank Transfer Instructions* section

Enter your new payment instructions in the text area

A screenshot of a form titled 'Bank Transfer Instructions'. At the top, there is a 'Display Name' field with the value 'Mail In Payment'. Below this is a large text area for instructions, which is highlighted with a red border. The text inside the box reads: 'Please make cheques payable to "Test Company" and write your invoice number on the back of the cheque'. Below the text area, there is a note: 'The instructions you want displaying to customers who choose this pay will be shown underneath the text entered above'.

Click *Save Changes*

The new payment instructions are displayed on invoices:

**UNPAID**

**Invoice #2**

Due Date: Tuesday, December 27th,  
2016

Please make cheques payable to  
"Test Company" and write your  
invoice number on the back of the  
cheque

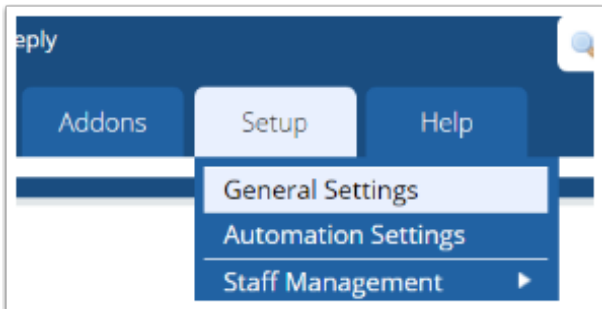
Reference Number: 2

# Fixing/Preserving Customer Invoice Data

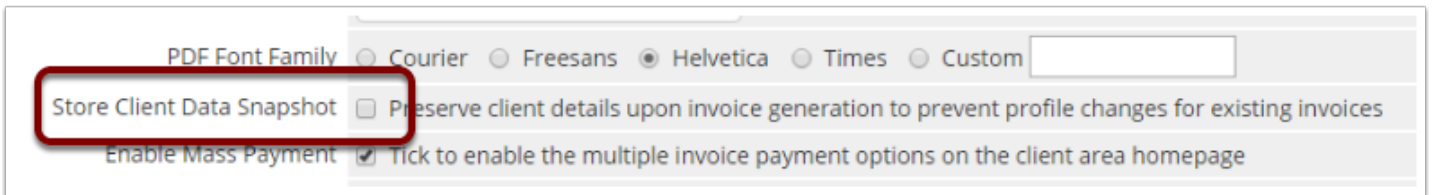
In some jurisdictions it is necessary to fix the client's name, address and tax ID to that in use at the time the invoice was generated. Subsequent changes to the client's profile data must not affect existing invoices.

This can be achieved in WHMCS via the *Store Clients Data Snapshot* option. Read on to find out more.

Begin by navigating to **Setup > General Settings > Invoices tab**



Tick the *Store Client Data Snapshot* checkbox



Click *Save Changes*

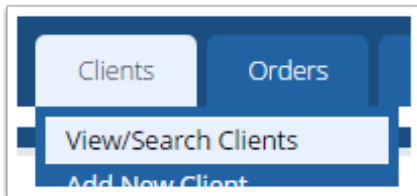
All invoices generated from now on will have the client's names, address and custom fields fixed to the profile data at the time of invoice generation. Invoices generated prior to enabling this option will still change based upon the client's profile data.



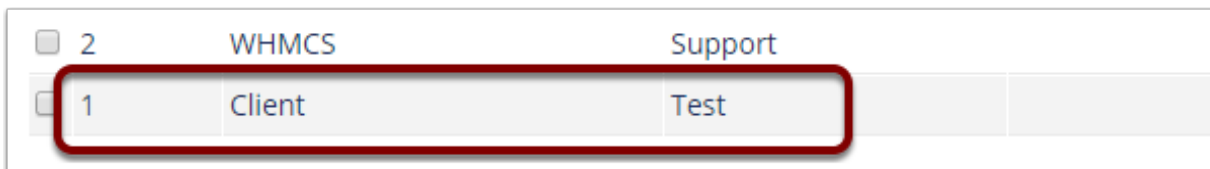
# Creating a renewal invoice early

There may be times where a client asks for you to invoice them for the next renewal date early. To do this in WHMCS:

Navigate to **Clients > View/Search Clients** and search for the client in question:



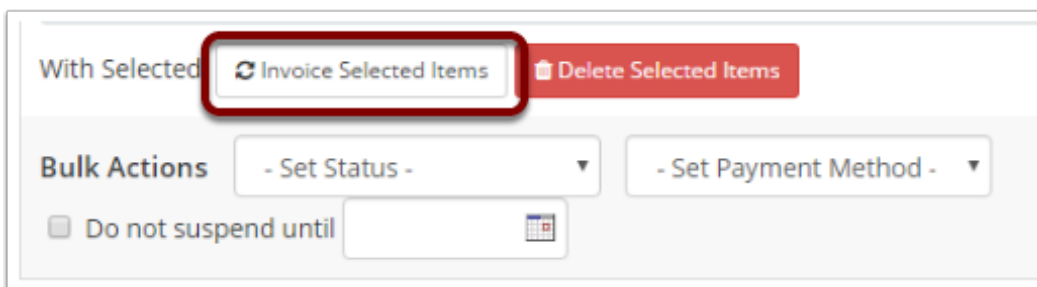
Click on the client's name to view their **Summary** tab:



Now tick the boxes of the **Products/Services/Addons** and/or **Domains** you want to generate an invoice for:

Products/Services							
<input type="checkbox"/>	ID	Product/Service	Amount	Billing Cycle	Signup Date	Next Due Date	Status
<input checked="" type="checkbox"/>	3	Bronze - exampledomain.com	\$10.00 USD	Monthly	02/06/2017	02/06/2017	Active
<input type="checkbox"/>	9	Silver - (No Domain)	\$20.00 USD	Monthly	25/05/2017	25/05/2017	Pending
<input type="checkbox"/>	7	Incoming, Outgoing & Archiving Bundle - testingwebsite.com	\$0.00 USD	Free	12/04/2017	-	Active
<input type="checkbox"/>	6	Bronze - example4t456.com	\$5.00 USD	Monthly	11/04/2017	11/04/2017	Pending

Scroll to the bottom of the page and click the *Invoice Selected Items* button to create the invoice(s) for the service(s):



The next invoice due for the service will now be generated immediately.

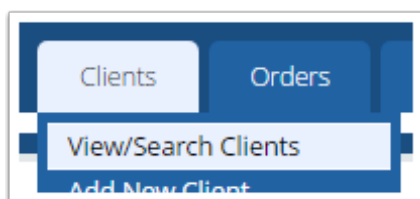
- You won't be able to generate another invoice if an invoice has already been made for the next due date.
- If the Separate Invoices option is enabled in the client's Profile or Client Group, when selecting multiple items here with the same Next Due Date, a single invoice will be generated.
- The status of the service, domain or addon must be Pending, Active or Suspended to generate an invoice

# Creating separate renewal invoices for a client's services

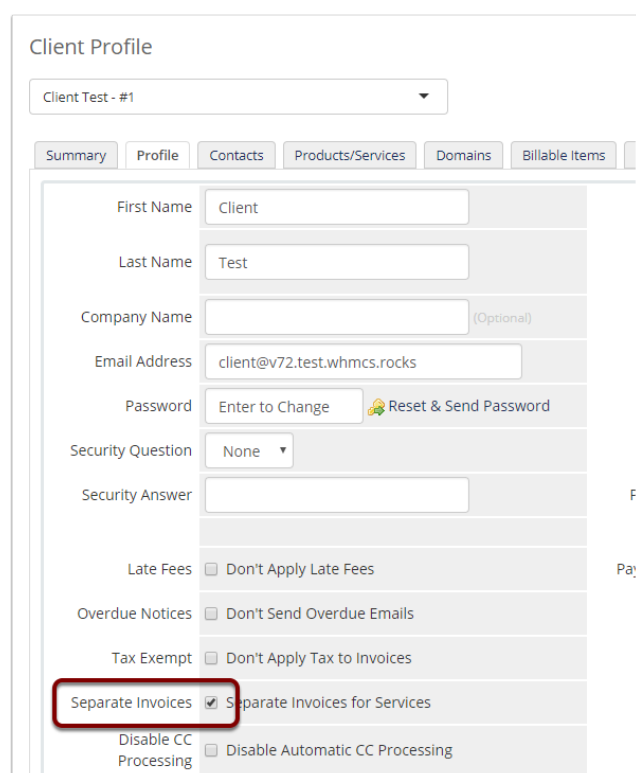
By default WHMCS groups the renewal invoices of services which are due on the same day together into a single renewal invoice. On occasion it may be desirable for each service to be invoiced on its own invoice. This guide explains how:

## Separate Invoices for one client

Navigate to **Clients > View/Search Clients** and search for the client in question:



Click on the client's name and then select their **Profile** tab:

A screenshot of the 'Client Profile' form in WHMCS. The form has a dropdown menu at the top set to 'Client Test - #1'. Below this are tabs for 'Summary', 'Profile', 'Contacts', 'Products/Services', 'Domains', and 'Billable Items'. The 'Profile' tab is active. The form contains fields for 'First Name' (Client), 'Last Name' (Test), 'Company Name' (Optional), 'Email Address' (client@v72.test.whmcs.rocks), 'Password' (Enter to Change), 'Security Question' (None), and 'Security Answer'. At the bottom, there are checkboxes for 'Late Fees', 'Overdue Notices', 'Tax Exempt', 'Separate Invoices' (checked), and 'Disable CC Processing'. The 'Separate Invoices' checkbox is highlighted with a red rectangle.

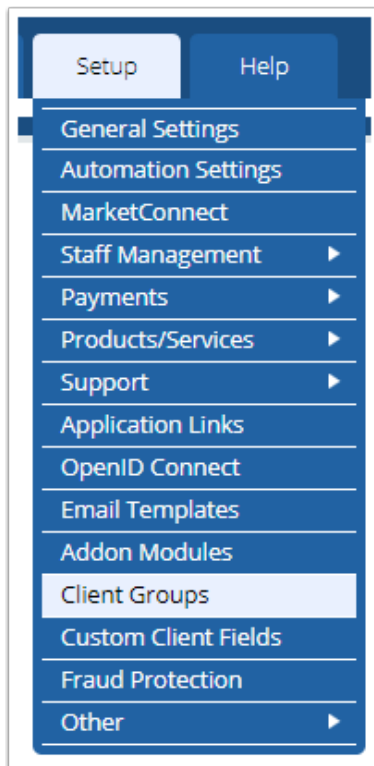
Tick the *Separate Invoices* checkbox

Click *Save Changes*

# Separate Invoices for multiple clients

If you have a group of clients who should receive a separate invoices for each service, this can be arranged using [Client Groups](#):

Navigate to Setup > Client Groups



1. Add a new client group with your desired name and colour.
2. Tick the *Separate Invoices for Services* checkbox

A screenshot of the 'Add Client Group' form. The form has the following fields: 'Group Name' with the value 'Special Clients' (annotated with a circled '1'), 'Group Colour' with the value '#ffffff' and a color picker icon, 'Group Discount %' with an empty input field, 'Exempt from Suspend & Terminate' with an unchecked checkbox, and 'Separate Invoices for Services' with a checked checkbox (annotated with a circled '2'). A 'Save Changes' button is at the bottom right.

Click *Save Changes*

Next navigate to the client's **Profile** tab (as shown above)

From the *Client Group* dropdown, select the newly created client group

SummaryProfileContactsProducts/ServicesDomainsBillable ItemsInvoicesQuotesTransactionsEmails

First NameClient

Last NameTest

Company Name(Optional)

Email Addressclient@v72.test.whmcs.rocks

PasswordEnter to ChangeReset & Send Password

Security QuestionNone

Security Answer

Late Fees☐ Don't Apply Late Fees

Overdue Notices☐ Don't Send Overdue Emails

Tax Exempt☐ Don't Apply Tax to Invoices

Separate Invoices☐ Separate Invoices for Services

Disable CC Processing☐ Disable Automatic CC Processing

Marketing Emails Opt-out☐ Don't send client marketing emails

Status Update☐ Disable Automatic Status Update

Address 1123 Test Street

Address 2(Optional)

CityHouston

State/RegionTexas

Postcode70077

CountryUnited States

Phone Number0123456789

Payment MethodSelect to Chang

Billing ContactDefault

LanguageEnglish

StatusActive

CurrencyUSD

Client GroupSpecial Clients

Two-Factor Authentication☐ Enabled - Uncheck to disable

Click *Save Changes*

Repeat the process to assign all the clients who should receive separate invoices to the client group.

# Troubleshooting

# Troubleshooting Payment Issues

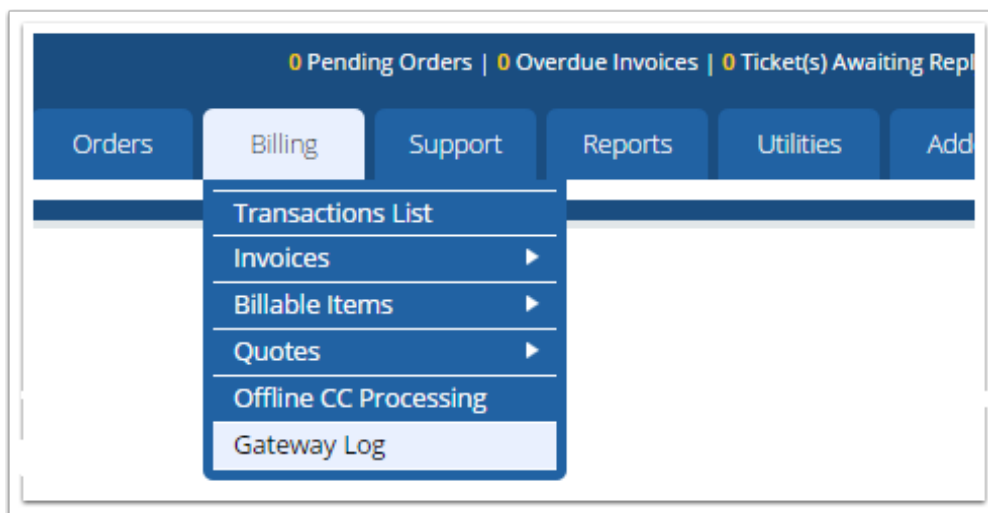
Should you have received a payment but do not see it recorded in WHMCS, check the following points.

## Check the Callback Settings

The first thing to check are the callback settings on your payment gateway's website to ensure it is configured to communicate with your WHMCS installation.

As a general rule, callback commands should be sent to the appropriate file in the `/modules/gateways/callback` directory but specific instructions for individual gateways can be found at [Payment Gateways](#).

## Check the Gateway Log



Look at the Result and Debug Data columns.

At the time of the payment attempt this should display an error message or code which your payment gateway's documentation or support team will be able to explain.

We have also collected some of the most common errors and their causes, refer to the appropriate page in the [Payment Gateways](#) section.

## No log entries

If there is no log entry at-all and you are using a [merchant gateway](#) (such as Authorize.net or PayPal Website Payment Pro) this suggests that the client has no card details on file. To confirm this:

1. Navigate to the client's **Summary** tab

## 2. Click Credit Card Information

The screenshot shows the WHMCS Client Profile interface. On the left, the 'Client Profile' tab is active, and the 'Credit Card Information' tab is highlighted with a red box and a circled '2'. The main content area displays the 'Clients Information' table for 'Client Test'. A modal window titled 'Credit Card Details' is open, showing 'Existing Card Details' as 'No existing card details on record' (highlighted with a red box and a circled '3'). Below this, the 'Enter New Card Details' section includes fields for Card Type (set to Visa), Card Number, Expiry Date (MM/YY), and CVV Number. At the bottom of the modal are buttons for 'Save Changes', 'Close Window', and 'Clear Details'. A circled '1' is also present near the 'Summary' tab in the background interface.

Clients Information	
First Name	Client
Last Name	Test
Company Name	
Email Address	client@v71.test.whmcs.rocks
Address 1	123 Test Street
Address 2	
City	Houston
State/Region	Texas
Postcode	70077
Country	US - United States
Phone Number	0123456789

3. In the example we can see there are no card details which we could charge.

## And finally...

If all the configuration is good, it indicates your gateway is unable to communicate with the callback file on your server. A server setting such as the firewall or mod\_security could be blocking them. Liaise with your payment gateway and server administrator to resolve such matters.

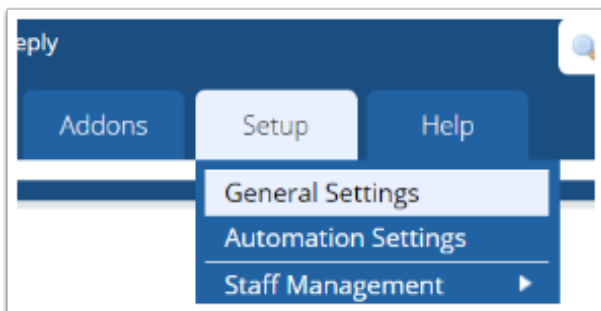


# Troubleshooting Client Details Display Issues on Invoices

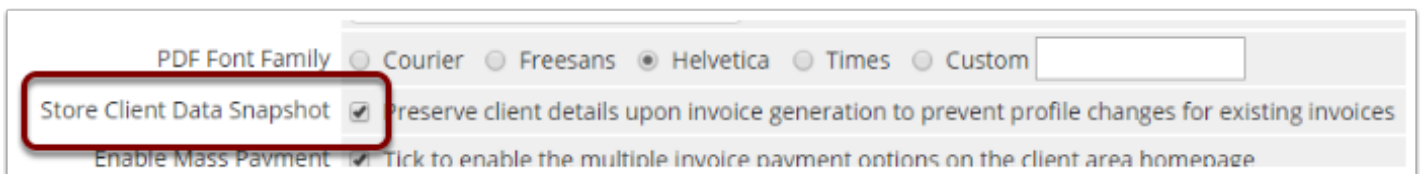
Sometimes client details may not be displayed on an invoice the way you're expecting. This guide explains the reasons for this.

## Store Client Data Snapshot

Navigate to Setup > General Settings > Invoices tab



Take note of the *Store Client Data Snapshot* setting:



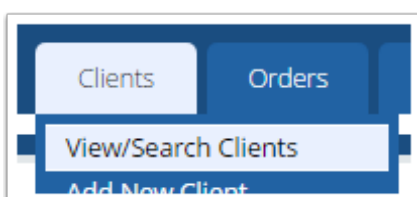
If the *Store Client Data Snapshot* option is ticked, the client's name and address which was on their profile at the invoice of invoice generation will be fixed on the invoice. Subsequent changes to the client's Profile data will not be reflected on existing invoices.

Unticking this option will cause all invoices to show the client's current Profile data on invoices.

More information on this feature is located at [https://docs.whmcs.com/Invoice\\_Tab#Store\\_Client\\_Data\\_Snapshot](https://docs.whmcs.com/Invoice_Tab#Store_Client_Data_Snapshot)

## Billing Contact

Navigate to Clients > View/Search Clients and search for the client in question:



Click on the client's name and then select their **Profile** tab:

The screenshot shows the 'Client Profile' form for 'Client Test - #1'. The 'Profile' tab is selected, indicated by a circled '1'. The form contains two columns of fields. The left column includes: First Name (Client), Last Name (Test), Company Name (Optional), Email Address (client@v72.test.whmcs.rocks), Password (Enter to Change with a 'Reset & Send Password' link), Security Question (None), Security Answer, Late Fees (checkbox), Overdue Notices (checkbox), and Tax Exempt (checkbox). The right column includes: Address 1 (123 Test Street), Address 2 (Optional), City (Houston), State/Region (Texas), Postcode (70077), Country (United States), Phone Number (0123456789), Payment Method (Select to Change), Billing Contact (WHMCS Suppo, highlighted with a red box and a circled '2'), and Language (English).

Review the *Billing Contact* setting.

- If the Billing Contact is set to *Default*, then the client's Profile data will be displayed on invoices.
- If the Billing Contact is set to something else, then the Contact's details will be displayed on invoices

If a Billing Contact is selected, click the **Contacts** tab

Client Profile

Client Test - #1

Summary

Profile

Contacts

Products/Services

Domains

Billable Items

Invoices

Quotes

Transactions

Emails

Contacts: WHMCS Support - whmcstester123@gmail.com

First Name

WHMCS

Last Name

Support

Company Name

(Optional)

Email Address

whmcstester123@gmail.com

Activate Sub-Account

☐ Tick to Enable

Password

Enter to Change

Email Notifications

☐ General
☐ Invoice
☐ Support
☐ Product
☐ Domain
☐ Affiliate

☐ Modify Master Account Profile
☐ View & Manage Contacts

Address 1

123 Test Street

Address 2

(Optional)

City

Houston

State/Region

Postcode

123456

Country

Sweden

Phone Number

123456789

☐ View & Pay Invoices
☐ View & Accept Quotes

Edit the Billing Contact's details, and this will update the client details displayed on the invoice.

More information on this feature is located at [https://docs.whmcs.com/Clients:Contacts\\_Tab#Billing\\_Contact](https://docs.whmcs.com/Clients:Contacts_Tab#Billing_Contact)