

PAYMENTS & CURRENCY

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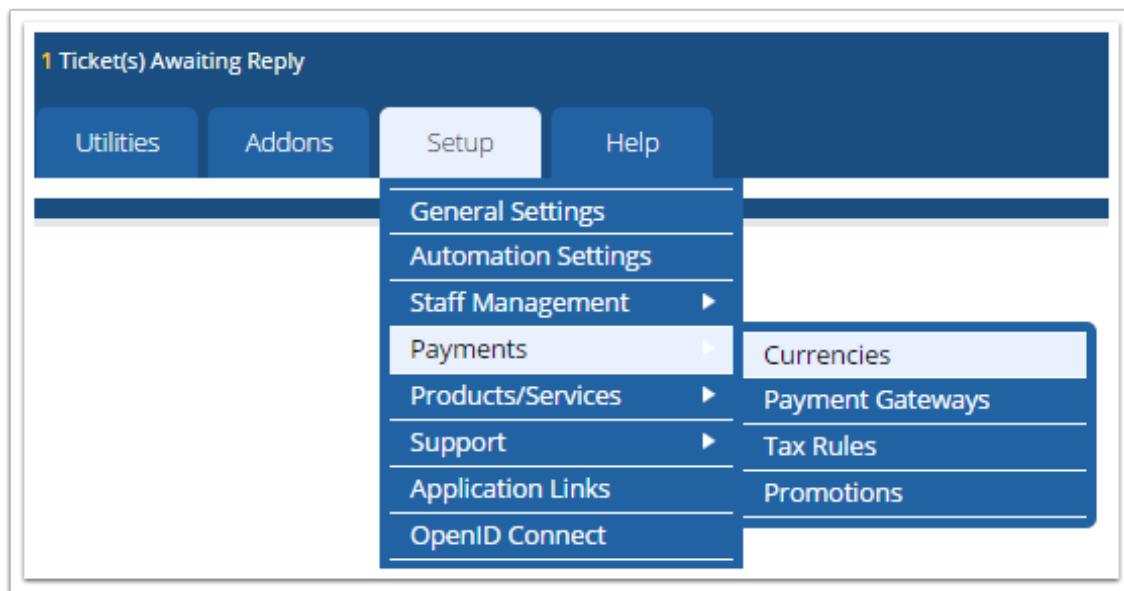
Multi-Currency

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

[Update Exchange Rates](#) [Update Product Prices](#)

Add Additional Currency

Currency Code	<input type="text" value="GBP"/> eg. USD, GBP, etc...
Prefix	<input type="text" value="£"/>
Suffix	<input type="text"/>
Format	<input type="text" value="1234.56"/>
Base Conv. Rate	<input type="text" value="0.8"/> The current rate to convert to base currency

[Add 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		

[Update Exchange Rates](#) [Update Product Prices](#)

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

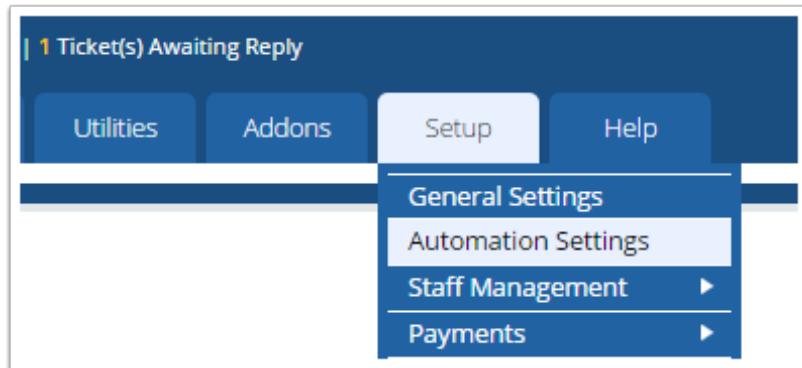
Currency	One Time/Monthly	Quarterly
GBP	Setup Fee 0.00	
	Price 7.00	2
	Enable <input checked="" type="checkbox"/>	1
USD	Setup Fee 0.00	
	Price 10.00	
	Enable <input checked="" type="checkbox"/>	

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

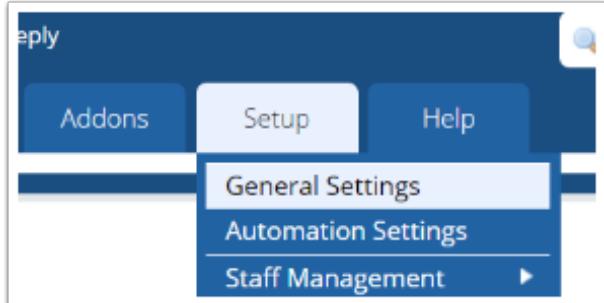
A screenshot of the 'Currency Auto Update Settings' page. At the top, there is a section titled 'Currency Auto Update Settings' with two checkboxes: 'Exchange Rates' and 'Product Prices'. Below this is a section titled 'Domain Reminder Settings' with a 'First Renewal Notice' field containing the value '30'. A large black circle with the number '1' is positioned above the 'Exchange Rates' checkbox. A large black circle with the number '2' is positioned above the 'Product Prices' checkbox.

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 the 'General Settings' page. The 'Pay To Text' field contains the address: '123 Test Street, Test Town Testville T12 4CB'. This text is enclosed in a red box. Below the field, a note says: 'This text is displayed on the invoice as the Pay To details'. The 'Logo URL' field is also visible with the value: '//v71.test.whmcs.rocks/whmcs/assets/img/logo.png'.

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

Payment Method:

Stripe ▾

Pay To:

123 Test Street,
Test Town
Testville
T12 4CB

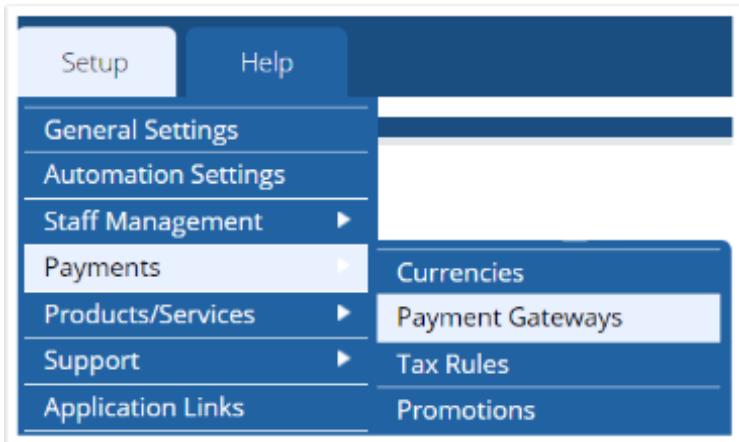
Invoice Date:

Tuesday, December 27th, 2016

Changing Payment Instructions on Invoices

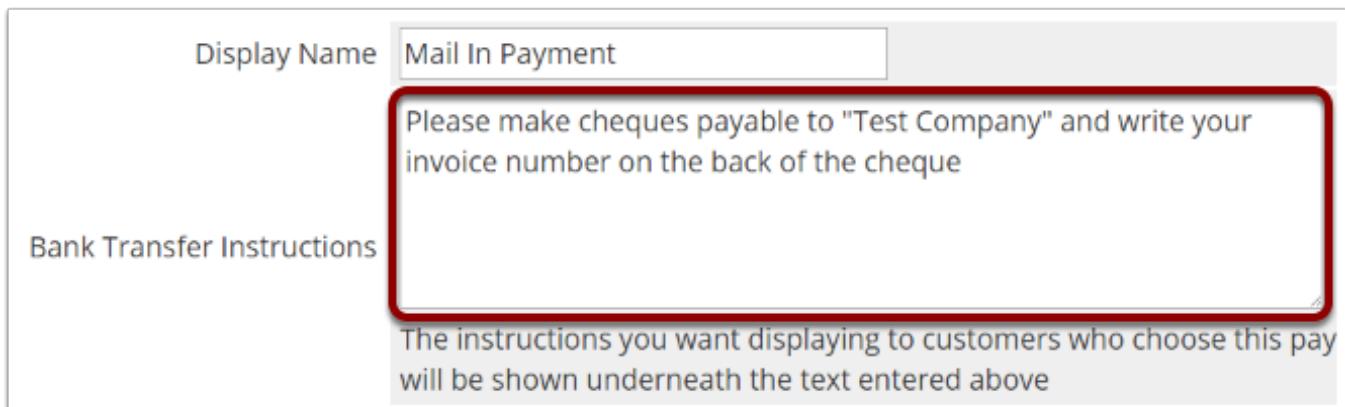
Invoices assigned to the *Mail in Payment* and *Bank Transfer* payment gateway modules will display payment instructions on invoices. To change these instructions:

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



Display Name

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

Bank Transfer Instructions

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

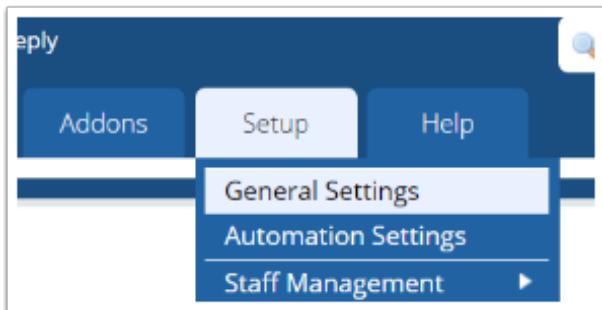
Reference Number: 2

Fixing/Preserving Customer Invoice Data

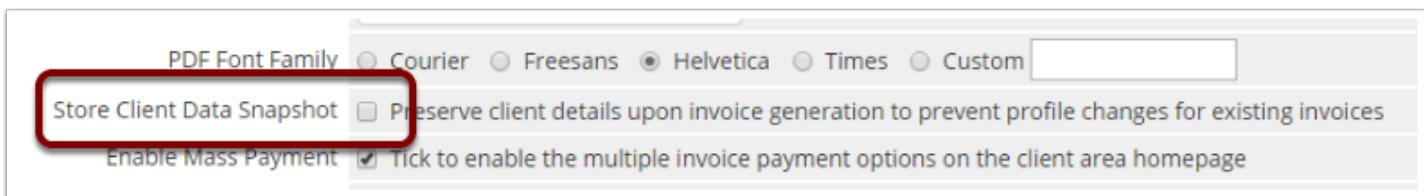
In some jurisdictions it is necessary to fix the client's name, address and tax ID to that in use at the time the invoice was generated. Subsequent changes to the client's profile data must not affect existing invoices.

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



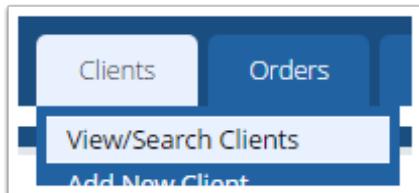
Click *Save Changes*

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:



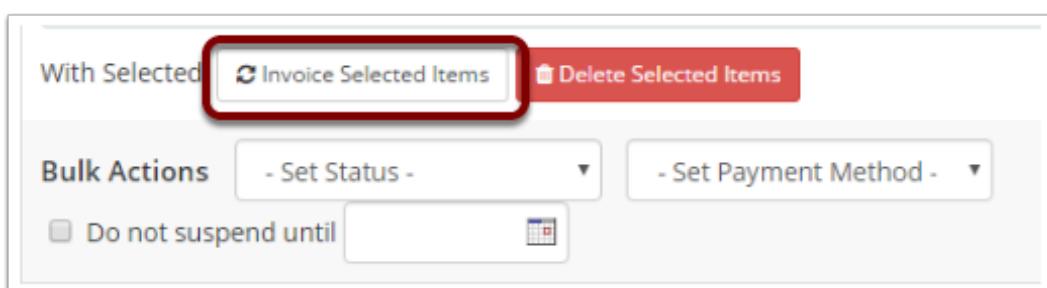
Click on the client's name to view their **Summary** tab:



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

Products/Services							
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 - exampledomain.com	\$5.00 USD	Monthly	11/04/2017	11/04/2017	Pending	

Scroll to the button 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 been generated immediately.

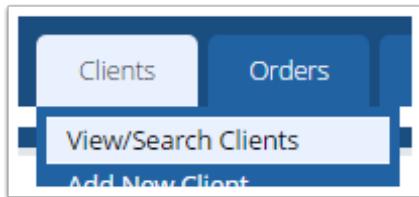
- You won't be able to generate another invoice if an invoice has already been made for the next due date.
- If the Separate Invoices option is enabled in the client's Profile or Client Group, when selecting multiple items here with the same Next Due Date, a single invoice will be generated.
- The status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

Client Profile

Client Test - #1

Summary Profile Contacts Products/Services Domains Billable Items

First Name	Client
Last Name	Test
Company Name	(Optional)
Email Address	client@v72.test.whmcs.rocks
Password	Enter to Change
Security Question	None
Security Answer	
Late Fees	<input type="checkbox"/> Don't Apply Late Fees
Overdue Notices	<input type="checkbox"/> Don't Send Overdue Emails
Tax Exempt	<input type="checkbox"/> Don't Apply Tax to Invoices
Separate Invoices	<input checked="" type="checkbox"/> Separate Invoices for Services
Disable CC Processing	<input type="checkbox"/> Disable Automatic CC Processing

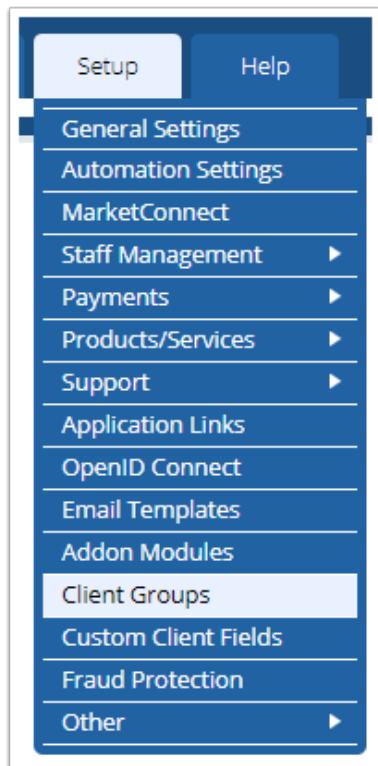
Tick the *Separate Invoices* checkbox

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

Add Client Group

Group Name	<input type="text" value="Special Clients"/> 1
Group Colour	<input type="text" value="#ffffff"/> 2
Group Discount %	<input type="text"/>
Exempt from Suspend & Terminate	<input type="checkbox"/>
Separate Invoices for Services	<input checked="" type="checkbox"/> 2

Save Changes

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

Summary	Profile	Contacts	Products/Services	Domains	Billable Items	Invoices	Quotes	Transactions	Emails
	<div style="display: flex; align-items: center;"> <div style="flex: 1; margin-right: 10px;"> <div style="display: flex; align-items: center;"> <div style="width: 30px; height: 20px; border: 1px solid #ccc; border-radius: 5px; margin-right: 5px;"></div> <div style="flex: 1;">First Name</div> </div> <div style="display: flex; align-items: center;"> <input type="text" value="Client"/> <div style="border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px; margin-left: 10px;">123 Test Street</div> </div> </div> <div style="flex: 1; margin-right: 10px;"> <div style="display: flex; align-items: center;"> <div style="width: 30px; height: 20px; border: 1px solid #ccc; border-radius: 5px; margin-right: 5px;"></div> <div style="flex: 1;">Last Name</div> </div> <div style="display: flex; align-items: center;"> <input type="text" value="Test"/> <div style="border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px; margin-left: 10px;">(Optional)</div> </div> </div> <div style="flex: 1; margin-right: 10px;"> <div style="display: flex; align-items: center;"> <div style="width: 30px; height: 20px; border: 1px solid #ccc; border-radius: 5px; margin-right: 5px;"></div> <div style="flex: 1;">Company Name</div> </div> <div style="display: flex; align-items: center;"> <input type="text" value="client@v72.test.whmcs.rocks"/> <div style="border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px; margin-left: 10px;">Texas</div> </div> </div> <div style="flex: 1; margin-right: 10px;"> <div style="display: flex; align-items: center;"> <div style="width: 30px; height: 20px; border: 1px solid #ccc; border-radius: 5px; margin-right: 5px;"></div> <div style="flex: 1;">Email Address</div> </div> <div style="display: flex; align-items: center;"> <input type="text" value="client@v72.test.whmcs.rocks"/> <div style="border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px; margin-left: 10px;">70077</div> </div> </div> <div style="flex: 1; margin-right: 10px;"> <div style="display: flex; align-items: center;"> <div style="width: 30px; height: 20px; border: 1px solid #ccc; border-radius: 5px; margin-right: 5px;"></div> <div style="flex: 1;">Password</div> </div> <div style="display: flex; align-items: center;"> <input type="text" value="Enter to Change"/> <div style="border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px; margin-left: 10px;">United States</div> </div> </div> <div style="flex: 1; margin-right: 10px;"> <div style="display: flex; align-items: center;"> <div style="width: 30px; height: 20px; border: 1px solid #ccc; border-radius: 5px; margin-right: 5px;"></div> <div style="flex: 1;">Security Question</div> </div> <div style="display: flex; align-items: center;"> <input type="text" value="None"/> <div style="border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px; margin-left: 10px;">0123456789</div> </div> </div> <div style="flex: 1; margin-right: 10px;"> <div style="display: flex; align-items: center;"> <div style="width: 30px; height: 20px; border: 1px solid #ccc; border-radius: 5px; margin-right: 5px;"></div> <div style="flex: 1;">Security Answer</div> </div> <div style="display: flex; align-items: center;"> <input type="text" value="None"/> <div style="border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px; margin-left: 10px;">Select to Change</div> </div> </div> <div style="flex: 1; margin-right: 10px;"> <div style="display: flex; align-items: center;"> <div style="width: 30px; height: 20px; border: 1px solid #ccc; border-radius: 5px; margin-right: 5px;"></div> <div style="flex: 1;">Late Fees</div> </div> <div style="display: flex; align-items: center;"> <input type="checkbox" value="Don't Apply Late Fees"/> <div style="border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px; margin-left: 10px;">Default</div> </div> </div> <div style="flex: 1; margin-right: 10px;"> <div style="display: flex; align-items: center;"> <div style="width: 30px; height: 20px; border: 1px solid #ccc; border-radius: 5px; margin-right: 5px;"></div> <div style="flex: 1;">Overdue Notices</div> </div> <div style="display: flex; align-items: center;"> <input type="checkbox" value="Don't Send Overdue Emails"/> <div style="border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px; margin-left: 10px;">English</div> </div> </div> <div style="flex: 1; margin-right: 10px;"> <div style="display: flex; align-items: center;"> <div style="width: 30px; height: 20px; border: 1px solid #ccc; border-radius: 5px; margin-right: 5px;"></div> <div style="flex: 1;">Tax Exempt</div> </div> <div style="display: flex; align-items: center;"> <input type="checkbox" value="Don't Apply Tax to Invoices"/> <div style="border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px; margin-left: 10px;">Active</div> </div> </div> <div style="flex: 1; margin-right: 10px;"> <div style="display: flex; align-items: center;"> <div style="width: 30px; height: 20px; border: 1px solid #ccc; border-radius: 5px; margin-right: 5px;"></div> <div style="flex: 1;">Separate Invoices</div> </div> <div style="display: flex; align-items: center;"> <input type="checkbox" value="Separate Invoices for Services"/> <div style="border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px; margin-left: 10px;">USD</div> </div> </div> <div style="flex: 1; margin-right: 10px;"> <div style="display: flex; align-items: center;"> <div style="width: 30px; height: 20px; border: 1px solid #ccc; border-radius: 5px; margin-right: 5px;"></div> <div style="flex: 1;">Disable CC Processing</div> </div> <div style="display: flex; align-items: center;"> <input type="checkbox" value="Disable Automatic CC Processing"/> <div style="border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px; margin-left: 10px;">Two-Factor Authentication</div> </div> </div> <div style="flex: 1; margin-right: 10px;"> <div style="display: flex; align-items: center;"> <div style="width: 30px; height: 20px; border: 1px solid #ccc; border-radius: 5px; margin-right: 5px;"></div> <div style="flex: 1;">Marketing Emails Opt-out</div> </div> <div style="display: flex; align-items: center;"> <input type="checkbox" value="Don't send client marketing emails"/> <div style="border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px; margin-left: 10px;">Enabled - Uncheck to disable</div> </div> </div> <div style="flex: 1; margin-right: 10px;"> <div style="display: flex; align-items: center;"> <div style="width: 30px; height: 20px; border: 1px solid #ccc; border-radius: 5px; margin-right: 5px;"></div> <div style="flex: 1;">Status Update</div> </div> <div style="display: flex; align-items: center;"> <input type="checkbox" value="Disable Automatic Status Update"/> <div style="border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px; margin-left: 10px;">Save Changes</div> </div> </div> </div>								

Click *Save Changes*

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

Troubleshooting

Troubleshooting Payment Issues

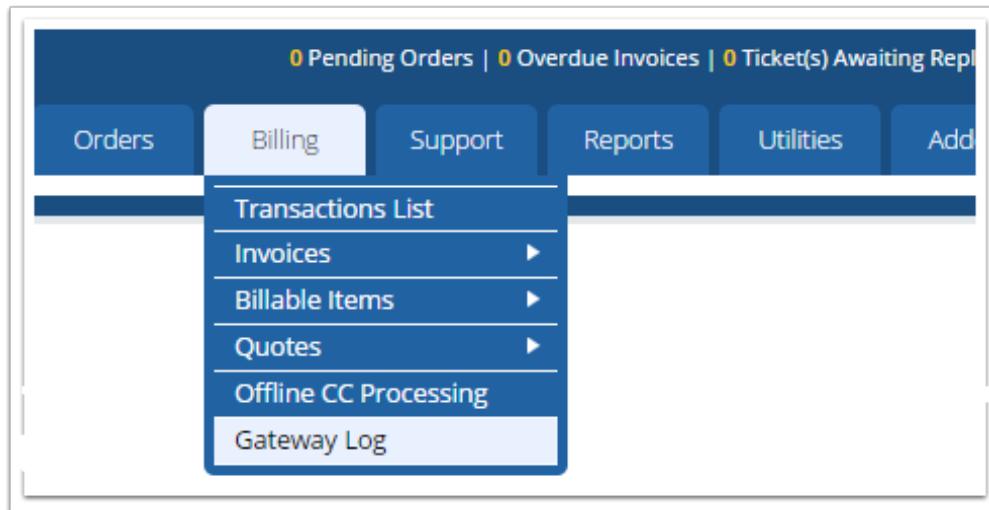
Should you have received a payment but do not see it recorded in WHMCS, check the following points.

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 for a client named 'Client Test'. The 'Profile' tab is selected (marked with a red circle 1). The main content area displays client information: First Name (Client), Last Name (Test), Company Name (client), Email Address (client@v71.test.whmcs.rocks), Address 1 (123 Test Street), Address 2 (Houston, Texas, 70077, US - United States, phone 0123456789). Below this is a 'Credit Card Information' link (marked with a red circle 2). A modal window titled 'Credit Card Details' is open, showing the message 'No existing card details on record' (marked with a red circle 3). The modal contains fields for Card Type (set to Visa), Card Number, Expiry Date, and CVV Number, along with 'Save Changes', 'Close Window', and 'Clear Details' buttons.

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

And finally...

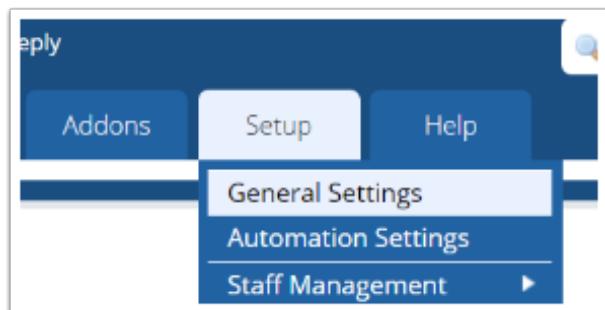
If all the configuration is good, it indicates your gateway is unable to communicate with the callback file on your server. A server setting such as the firewall or mod_security could be blocking them. Liaise with your payment gateway and server administrator to resolve such matters.

Troubleshooting Client Details Display Issues on Invoices

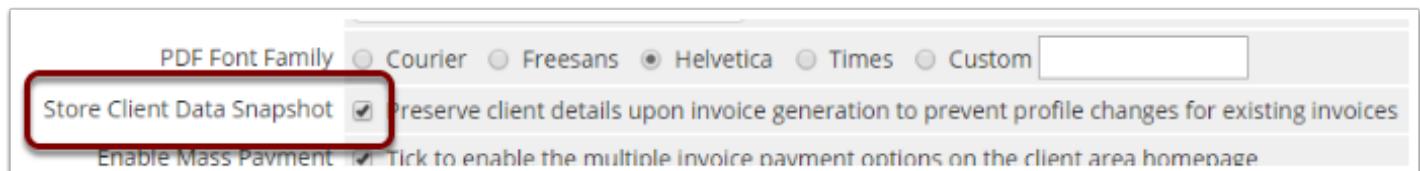
Sometimes client details may not be displayed on an invoice the way you're expecting. This guide explains the reasons for this.

Store Client Data Snapshot

Navigate to Setup > General Settings > Invoices tab



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



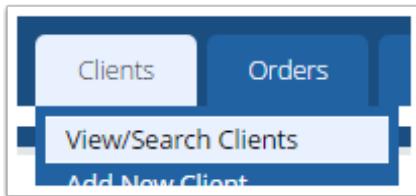
If the *Store Client Data Snapshot* option is ticked, the client's name and address which was on their profile at the time of invoice generation will be fixed on the invoice. Subsequent changes to the client's Profile data will not be reflected on existing invoices.

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

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:

Client Profile

Client Test - #1

1

Profile

Summary Contacts Products/Services Domains Billable Items Invoices Quotes Transactions Emails

First Name	Client	Address 1	123 Test Street
Last Name	Test	Address 2	(Optional)
Company Name		City	Houston
Email Address	client@v72.test.whmcs.rocks	State/Region	Texas
Password	Enter to Change	Postcode	70077
Security Question	None	Country	United States
Security Answer		Phone Number	0123456789
Late Fees	<input type="checkbox"/> Don't Apply Late Fees	Payment Method	Select to Change
Overdue Notices	<input type="checkbox"/> Don't Send Overdue Emails	Billing Contact	WHMCS Suppo
Tax Exempt	<input type="checkbox"/> Don't Apply Tax to Invoices	Language	English

2

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	Address 1	123 Test Street
Last Name	Support	Address 2	(Optional)
Company Name		City	Houston
	(Optional)	State/Region	
Email Address	whmcstester123@gmail.com	Postcode	123456
Activate Sub-Account	<input type="checkbox"/> Tick to Enable	Country	Sweden
Password	Enter to Change	Phone Number	123456789
Email Notifications	<input type="checkbox"/> General <input type="checkbox"/> Invoice <input type="checkbox"/> Support <input type="checkbox"/> Product <input type="checkbox"/> Domain <input type="checkbox"/> Affiliate <input type="checkbox"/> Modify Master Account Profile <input type="checkbox"/> View & Manage Contacts	<input type="checkbox"/> View & Pay Invoices <input type="checkbox"/> 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