



Version 5.0

Release Announcement

www.whmcs.com

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Introduction

We are pleased to announce the release of WHMCS Version 5.0. A milestone release for WHMCS, this document showcases all the new features and functionality that has been introduced in our latest and biggest ever upgrade! *Happy Reading... & Apologies it's so long 😊 From Matt & All the WHMCS Team*

New Client Area Style

Version 5.0 sees the introduction of a brand new client area design, introducing a **fresh**, **modern** and **clean** new look, completely **rewritten** to take full advantage of all the developments and improvements made to WHMCS in recent releases.

With the new design we started from scratch, making full use of includes and CSS to reduce code replication and make customisation simpler than ever. And built based on the **Bootstrap** CSS framework from Twitter, it has a solid base for both **cross browser compatibility**, and **consistent styling**. Designed also to be very flexible, we have used neutral colors, that are easy to customise via the included CSS stylesheet, and a navigation bar supporting both full width and fixed width implementations so that it's flexible enough to fit into almost any design.

For existing users, **nothing has to change...** unless you want it to. If you've already integrated or customised WHMCS, and are happy with your current style, then don't worry, because everything is **backwards compatible** and you aren't forced to re-integrate or use the new design at all unless you want to.



Standalone Portal Look



Full Width Header

Updated Order Forms Styling

As part of the styling updates done to the rest of the client area, the order forms have also received some attention. Predominantly to just tweak and ensure wider compatibility with custom integrations in terms of fixed styling – since we only recently introduced a number of new order form styles in the previous WHMCS release – but there have also been some additions and improvements.

One of those is with regards to how product options are displayed. Now rather than just listing the base price of the product (which can often be zero if a price is based purely on options), it will instead show the total value of all the default config options being selected. So a product with a \$0 base price, and a \$50 minimum configurable option will now show a pricing label of "Starting from \$50.00" indicating a truer reflection of price, and that there are options to be selected that may increase it.

Product Bundles

The new product bundles feature we've introduced is a very powerful feature indeed. Bundles allow you to not only setup order form links that automatically take the user through the order process for 2 or more products together, but also provides a way for you to link to the order form with specific configurations in those products (billing cycles, configurable options and/or addons) pre-selected by default.

And as if that wasn't enough, you can also set product bundles to be displayed alongside products within your product groups, allowing them to be listed & promoted just like products.

Found In: Setup > Product Bundles

Docs: http://docs.whmcs.com/Product_Bundles

Product Quantities & Recurring Cycles

In V5, it will now also be possible to specify if a product should allow multiple quantities (which can be used for anything that doesn't require individual configuration per instance) and if enabled, the user is then able to specify a desired quantity on the view cart page and update to view the new total.

Another new feature is the ability to setup products which only recur for a fixed number of recurring cycles, before stopping. So for example this allows you to offer items that recur a set number of times and then stop, for example instalment payments, or fixed time period items. There's also a "No Commission" affiliate option been added for products where it's not desired to offer any commission pay-outs to affiliates.

Found In: Setup > Products/Services > Edit Product > Pricing Tab > Allow Multiple Quantities
Docs: http://docs.whmcs.com/Products_and_Services#Pricing_Tab

Admin Dashboard Widgets

Admin homepage widgets are a new functionality in WHMCS V5 that allows each member of staff using your WHMCS installation to customise and tailor the front dashboard page to their specific needs. For admins, the new widgets give them more power to control what each staff member sees on the admin home screen, with access definable per admin role group, and for individual staff it allows them to simply drag & drop to arrange the homepage as they wish, putting the most important tools and stats for their job at the top, and minimising any they don't want or need.

And we're sure that many developers will start taking advantage of these soon, with homepage widgets able to be defined from any provisioning, registrar or addon module, and all included widgets being open source, the possibilities with widgets really are unlimited.

Found In: Admin Homepage // Setup > Administrator Roles (Permissions Configuration)
Docs: <http://docs.whmcs.com/Widgets>

Client Area

The client area already has a revamped look as we mentioned above. But the improvements don't just stop at the visual changes. Here's why:

- **Client Date Display Format** – You can now set a different display format for dates to end users via the client area & invoices, with text format options available
- **Cancellation Requests** – process enhanced to offer the option to automatically disable auto renewal for an associated domain when a domain registration record exists for the hosting being cancelled
- **Default Payment Method** - Clients can now view and change their default payment method setting, for all their services and invoices, right from the client area themselves, without ever needing to contact you
- **List Sorting** – Added sorting support to all client area lists/pages for re-ordering of lists by any column
- **Home Login** – Added the ability to default to the client area login page for home

Domain Management

Another area we've worked on in Version 5 is domain management, with the key aim to make domain management more powerful, and easier to use:

- **5 Nameservers** – support for an additional nameserver meaning up to 5 can be set for any domain
- **Default Nameservers** – a new default nameserver setting allows both clients and admins to have domains reverted to the default nameservers (be those for the hosting server the domain is hosted on, or the system defaults)
- **End User Bulk Domain Management** – including support for changing nameservers, auto renew status, registrar lock & WHOIS contact information across multiple domains at the same time
- **Auto Assign Contact Info** – WHOIS information can now be automatically changed to the values from the master clients profile or any contacts automatically
- **Domain Minimum Renewal Settings** – enforcing restrictions such as .UK domains which cannot be renewed/extended more than 6 months before expiry
- **Free Domain Renewal Logic Improvements** – will now automatically revert free domains to regular price upon cancelling of associated products, and not auto renew domains where no matching active product is found – instead notify admins
- **Domain Pricing Slabs** – Describing in more detail later on

Found In: Client Area My Domains Pages + Admin Profile Domains Details Tab

Docs: http://docs.whmcs.com/Domains_Management#In_Bulk

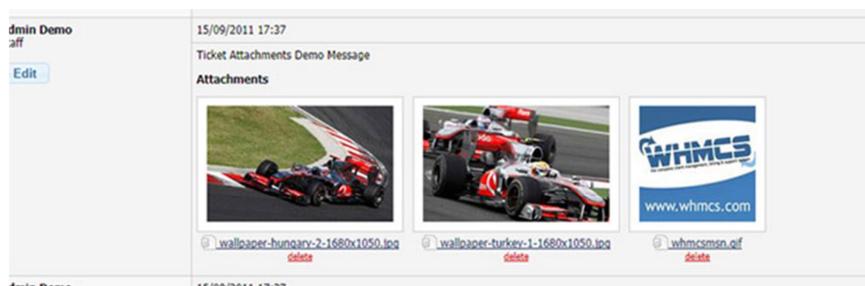
Support Tools

Support is a key part of the tools we provide in WHMCS, so here's what's new on the support front...

- **Admin Open Ticket Process** – has been simplified with an ajax client lookup form and the ability to select contacts to open tickets with
- **Department Change Notification Email** – added for when a ticket is reassigned
- **Automatic KB Suggested Answers** – can now be included in support ticket notification emails as well using an email merge field
- **Hidden Downloads** – Now you can hide individual downloads as well as entire groups
- **Download Link** – Added download url to admin area manage downloads page to make it easier for admins to obtain download links to give out
- **Mass Action Confirmation** – Added confirmation dialogs to mass ticket actions and attachment deletes
- **KB Article Ordering** – Added support for custom ordering of KB articles
- **Contact User Logging** – When contacts open tickets, this is now recorded and clearly displayed to staff and users when viewing tickets
- **Product Downloads Directory Listing** – Added support for product downloads to be displayed in downloads directory

Attachment Thumbnails

A new option in V5.0 also allows you to enable image previews for ticket attachments, which when enabled will then display a thumbnail sized preview of the image to allow you quickly identify & see what's in the attachment you're looking for without even needing to open it.



Found In: Setup > General Settings > Support (+ Ticket View Display of Thumbnails)

Docs: http://docs.whmcs.com/Support_Tab

Admin Updates

The admin area is where most of us – “us” being users who buy & use WHMCS – spend the majority of our time, and so that’s a very key area. We’ve always had a strong focus on good, simple usability, with powerful functionality without being cluttered, and in V5 we’ve added more of what you asked for.

- **Optimised Layouts** – Revamped product and domain admin management pages, utilising 2 columns to maximise available screen space and make options available with less scrolling
- **Mass Mail** – Now with additional options to send emails relating to addon specific criteria, and updated to allow filters based on checkbox custom fields, with support for both on and off state filtering
- **Admin Mass Payments** – Admins can now run capture attempts on multiple invoices for a client in a single go utilising mass pay from the admin area
- **Admin Add Funds Invoices** – Ability for admins to generate add funds invoices
- **Ajax Client Search** – Added ajax client search to both client merge and product move
- **Orders IP Search** – Added the ability to search orders by IP address
- **Cancellation Requests Management** – Ability to sort & filter cancellation requests
- **Client Notes Notification** – Added number of notes to admin clients profile notes tab - makes it easier to know when a user has notes
- **Additional Client Filter Options** – Added currency & state filter to admin clients list
- **View PDF** – A new option to open PDFs within a browser in the admin area without having to save and download
- **Status Labels** – Added status labels to products lists & intelligent search results to make identifying desired items easier
- **Staff Noticeboard** – allowing staff to post notes for all to see
- **Context Sensitive Help Shortcuts** – Taking you straight to our new & improved, comprehensive docs & help related to the page you’re on

PayPal Integration

Let’s face it, which gateway do 99% of our customers use as their primary option? Yep you guessed it... PayPal! So we’ve always ensured our integration with PayPal has been tight and feature rich. In V5 we’ve got even more...

- **Expanded PayPal Transaction Lookup** – to now display exchange rate and settlement amount where available

- **More Transaction Search Options** – you can now search the transactions directly within your PayPal account (not just WHMCS) by options including Date Range, Email & Receipt ID
- **New Homepage Widget** – for live PayPal Balance display and Quick Transaction Lookup
- **PayPal Express Checkout Integration** – PayPal Express Checkout makes checkout **easier** for users who want to pay by PayPal. Users can opt to checkout via PayPal which saves them having to enter their name & address details on your site, instead **auto pre-filling** the fields with the values from their PayPal account, and automatically & immediately capturing the payment upon the checkout button being clicked on your website (no recurring support however)

Found In: Setup > Payment Gateways > PayPal Express

Docs: http://docs.whmcs.com/PayPal_Express

Modules

WHMCS integrates with hundreds of modules for payment processing and automation. And in each release we update, enhance and extend a wide number of them.

- Enom & ResellerClub/LogicBoxes Module Updates
- cPanel Integration Enhancements - Improved error detection, upgrade/downgrade auto IP assignment & logging + customisable client area login shortcuts
- Added eWay UK Gateway Module & TPPInternet Registrar Sync Script
- Added Recurring Echeck Gateway Module Support
- WorldPay Module URLs updated in advance of old URLs upcoming switch off
- New Registrar Modules for GMOInternet & RegisterEU
- SSL Configuration Process Enhancements
- Added Module Debugging Mode to aid with troubleshooting issues by yourself

Domain Pricing Slabs

Also referred to as domain pricing tiers, with this new feature it is now possible to set domain pricing on a per client group basis. This allows you to offer better pricing to selected clients. TLDs can be assigned prices on a per group basis, and clients can then be assigned to the groups in order to receive the different pricing automatically. This allows you to give pricing breaks to your

best customers, and offer a tiered pricing structure for your high volume domain users, without needing to setup lots of individual promotion codes to define the discounts each TLD should have.

Found In: Setup > Products/Services > Domain Pricing > Open Pricing // Setup > Client Groups
Docs: http://docs.whmcs.com/Client_Groups#Domain_Pricing_Slabs

Automated Email Marketer

Have you ever wanted to follow up on clients who cancel? Maybe try to entice them back with offers? Or maybe you've got some addon services that if users don't buy from you initially, you'd like to remind them about after a few weeks? If the answer to any of those is yes, then the new Email Marketer Utility from WHMCS is for you!

Think of it like Mass Mailing, but reloaded - with definable conditions and fully automated sending, every day of the year! This new functionality will allow you to configure emails to your clients when various client or product criteria are met.

The possibilities with this tool are endless, designed to help you maximise your existing client base, both to ensure you're keeping them happy, and to promote the other products/services you offer.

Found In: Utilities > Email Marketer
Docs: http://docs.whmcs.com/Email_Marketer

Additional Social Networking Integration

Many users already use the Twitter Feed integration that has existed in WHMCS for some time now. But in Version 5, we've taken Social Integration to a new level, with the addition of a "Tweet" button on news & announcements posts, Facebook Recommend & Send integration, Facebook Comments for direct user feedback & the new Google+ recommendations.

Found In: Setup > General Settings > Social
Docs: http://docs.whmcs.com/Social_Networking

Send Invoice Emails

In Version 5.0, it is now possible to send any configured invoice related email template, on demand, from the invoice view. And therefore to complement that new functionality, we have made it possible for you to create your own custom invoice related templates, utilising any of the invoice related merge fields available in WHMCS email templates, to allow you to cover all the scenarios you might need.

We've also added a new **Refund Confirmation** email template sent whenever a refund is issued to notify and confirm to the customer that a refund has been processed.

Found In: Setup > Email Templates // Billing > Invoices

Docs: http://docs.whmcs.com/Messages/Emails#Invoice_Related

reCAPTCHA Integration

A new option for protecting against spam form submissions for all areas including the pre-sales contact form, ticket submission pages and domain checker, is reCAPTCHA from Google. reCAPTCHA is widely used on many websites, and features both text and speech verification options. More info can be found on it @ <http://www.google.com/recaptcha>

Found In: Setup > General Settings > Security

Docs: http://docs.whmcs.com/Google_reCAPTCHA

Language File Overrides

This one won't just benefit developers, but if your addons or customisations require defining additional language file lines, or editing existing ones, language override files will now allow you to keep these customisations separate from the core language files, simplifying upgrading and ensuring that your customisations won't ever be overwritten and lost.

Found In: N/A

Docs: http://docs.whmcs.com/Language_Files#Overriding_Language_Strings

Predefined Replies Merge Fields

Tired of having to replace welcome greetings manually in predefined messages? Well no longer, as with WHMCS V5 you can now have the first name, full name and email address automatically merged into replies anywhere you want. Infact the merge fields also work when typing custom replies, so simply enter [NAME] in your message and the customers name will be inserted upon submission.

Found In: Support > Predefined Replies

Docs: http://docs.whmcs.com/Support_Tickets#Predefined_Ticket_Replies

Global Header/Footer for Emails

WHMCS emails have always contained your company logo, linked to your website, at the top of every email sent. Well now you can customise this via the Global Header & Footer settings, adding to, removing or even adding your own complete HTML wrappers immediately applied to all the emails you send.

Found In: Setup > General Settings > Mail

Docs: http://docs.whmcs.com/Email_Templates#Adding_Headers_and_Footers

Due Date Adjustment Prorata

Mass Product/Service Updating from the admin client summary page has been enhanced to include the ability to perform mass module commands, set a suspension override in bulk, but also to perform automated prorate calculations for a due date adjustment. What this means is that if a client comes to you asking for all their products to be due on a certain day each month, that you can now get WHMCS to invoice the user for the difference due, and make the change to the due dates of all the items, automatically. Brilliant!

Found In: Clients Summary Pages > Mass Update Items

Docs: http://docs.whmcs.com/Products_Management#Client_Side

More Tightly Integrated Addons Directory/App Store

Ok so it might not be on a level with the Apple App Store quite yet, but in V5, we've added lots of additional developer functionality (discussed later on), and also tried to make it easier for developers to get their developments out there and known the WHMCS community. So with that in mind, we've revamped the Community Addons directory on our site, adding support for comments and social networking promotion, as well as integrating an addons browser, directly into WHMCS installations accessed via the "Addons" tab within the admin area, allowing you to browse and search the addons listed in our directory direct from your own WHMCS installation.

Found In: Main Addons Menu Tab

Docs: N/A – Community Addons Directory @ <http://www.whmcs.com/communityaddons>

Price Override Promotions

Have you ever wanted to offer a promotion where it's a fixed price for the first month, no matter what the product starting price? Previously this would only have been possible by creating a promo code for each of your products, with the appropriate fixed amount discount specified for each, but now it will be much easier with the new Price Override promotional type. What this allows you to do is setup a promotion that rather than giving a specific \$x or y% discount allows you to set the price you want to be charged for that product, and thus one promotion code can give an introductory trial offer on multiple products all of varying prices (think "first month just \$1" type offers).

Found In: Setup > Payments > Promotions

Docs: <http://docs.whmcs.com/Promotions>

Finer Grained Admin Permission Controls

There are over 15 new admin permission controls in Version 5.0, allowing admins to control even more precisely exactly what areas and actions you want to permit your staff to access and perform. New role permissions include

the ability to access client's summary pages separately to full client lists, access to the login as client functionality and support to allow read only, edit and/or delete access to various configuration areas separately.

Found In: Setup > Administrator Roles > Edit Role

Docs: http://docs.whmcs.com/Administrators_and_Permissions

Developer Functionality

In WHMCS we've always had a focus on ensuring WHMCS is not only feature rich and easy to use, but also equally as easy to customise and extend. And so we've also introduced a number of new and enhanced developer related options.

- **Admin Homepage Widgets** - The V5 admin homepage now consists of widgets - movable blocks, with access permissions defined per admin role so admins only see the items that apply to them, and that allows each admin user of WHMCS to customise and tailor the homepage exactly to their needs. But that's not all, any addon module, provisioning module or registrar module in WHMCS can register and define additional widgets to the system.
- **Client Area Addon Modules Output** - Another addition to addon modules in V5 is that you can now generate client area output from them also. This means that an addon module is no longer restricted to just admin side pages and features, but can now be used to define additional client area content & pages, in much the same way as a server/provisioning module can do already.
- **New Hook Points** - V5 includes numerous additional hook points, but 2 key ones are new hooks that allow you to create client area loginshare modules, which you can use to be able to authenticate customers against an existing database, and automatically create new profiles in WHMCS when needed, and that will accept HTML returns for output in the <head> and <body> sections of the WHMCS client area, allowing hooks to generate and return output such as JavaScript, popups, etc... Without the need to edit any templates.
- **Hooks Support in Provisioning & Registrar Modules** - Server & Registrar modules can now also make use of the hooks system in WHMCS, allowing them to go much further than ever before. Based on the same popular hooks integration method that addon modules use, a hooks file can now exist in all 3 module types in order to tie into any of the available hook points throughout WHMCS.
- **Language File Overrides** - This one won't just benefit developers, but if your addons or customisations require defining additional language file lines, or editing existing ones, language override files will now allow you to keep these customisations separate from the core language files, simplifying upgrading and ensuring that your customisations won't be overwritten.
- **New API Functions** - As is normal in every release we do, we've also added a number of additional API functions based on user requests in recent months, and expanded the options

in some existing ones to give greater flexibility and functionality that can be utilised by both the local and external API systems.

Found In: N/A

Docs: http://docs.whmcs.com/Developer_Resources
http://docs.whmcs.com/Provisioning_Module_Developer_Docs
http://docs.whmcs.com/Registrar_Module_Developer_Docs
<http://docs.whmcs.com/Widgets>
<http://docs.whmcs.com/Hooks>
<http://docs.whmcs.com/Hooks:System>
<http://docs.whmcs.com/Hooks:Products/Services>
http://docs.whmcs.com/Language_Files#Overriding_Language_Strings
<http://docs.whmcs.com/API#Functions>

Security

Security is always a priority with the code we produce. And V5 sees a number of a security related options that have been added.

- Google reCAPTCHA support for preventing form spam
- Added the ability to disable admin password resets in Setup > General Settings > Security
- Custom FTP port support for Daily FTP Backups

- END -

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