

# Classic Invoicer

---

*Classic Invoicer documentation by samkaranja*

*Version 1.2*

---



---

Created: 21/10/2014

By: Sam Karanja

Email: [sammkaranja@gmail.com](mailto:sammkaranja@gmail.com)

Thank you for purchasing my script, if you have any questions that are beyond the scope of this documentation, please feel free to email me via the email provided above.

---

# Table of Contents

1. Introduction
2. Requirements
3. Pre-Installation steps
4. Installation
5. Post-Installation steps
6. User Guide
7. Acknowledgement

# Introduction

Classic Invoicer is a web-based invoicing and client management system implemented using CodeIgniter framework. It uses JQuery and MYSQL database. Classic Invoicer system will give you the opportunity to create custom invoices and send them to your clients directly, it will also help you in managing and tracking your income by the detailed reports it produces.

## Requirements

Classic Invoicer can be installed on any PHP enabled web server that can connect to a MySQL database. This includes shared servers, dedicated servers, and local installations running on Linux, Unix, BSD, Mac OS X, and Microsoft Windows operating systems. The requirements to have classic invoice system up and running are: -

- Web Server
- PHP
- MySQL Database Server

## Pre-installation Steps

Classic Invoicer is a web based solution that needs its relevant files to exist on the web server. The files can be copied to the web server by extracting the download package on your computer and uploading its contents to the web server via FTP, or by copying the download package to the web server directly and extracting its contents there.

The contents of the download package need to be copied to the public HTML directory in the web server it is serving from.

Examples of public HTML directories are:

- /home/chat/public\_html/
- /srv/www/htdocs/
- /usr/local/htdocs/
- /var/www/vhosts/chat.com/httpdocs/

The contents of the download package once extracted are:

- application (directory)
- system (directory)
- assets (directory)
- install (directory)
- pdfinvoices (directory)
- .htaccess
- index.php

## Installation

The installation process is quick and straight forward, after uploading the files to your web server, open your browser and navigate to the install url by typing

[http://\[yourdomain\]/\[youappfolder\]/install](http://[yourdomain]/[youappfolder]/install)

After entering the above url the install screen should appear as shown below

### Classic Invoicer Installation

Database Details

Hostname

localhost

Database User

root

Database Password

Database Name

Company Details

Company Name

Company email

Currency Symbol

Administrator Account

Email

Username

Password

Install

Fill in your database details i.e. the hostname, database user, database password and the database name. Then enter the company name and email and your app currency.

Also in this screen you will be able to create a default master administrator account by specifying the email, username and the password. This details will be used to login to the system as a master administrator. After all the required fields are entered correctly, your form will look like this

## Classic Invoicer Installation

Database Details

Hostname

localhost

Database User

root

Database Password

\*\*\*\*\*

Database Name

test

Company Details

Company Name

test

Company email

test@domain.com

Currency Symbol

\$

Administrator Account

Email

admin@domain.com

Username

admin

Password

\*\*\*\*\*

Install

Click on install button to start the installation process.

And it's as simple as that, now the Classic Invoicer System has been installed and can be accessed via your web browser.

## Post – Installation steps

But just before you begin using system, you will need to do one more thing, if you followed all the installation steps properly you should now see the following screen when you try to access your system

### Classic Invoicer Installation

Please delete or rename the Install folder to disable the installation script

Database Details

Hostname

localhost

Database User

root

Database Password

Database Name

Company Details

Company Name

Company email

Currency Symbol

Administrator Account

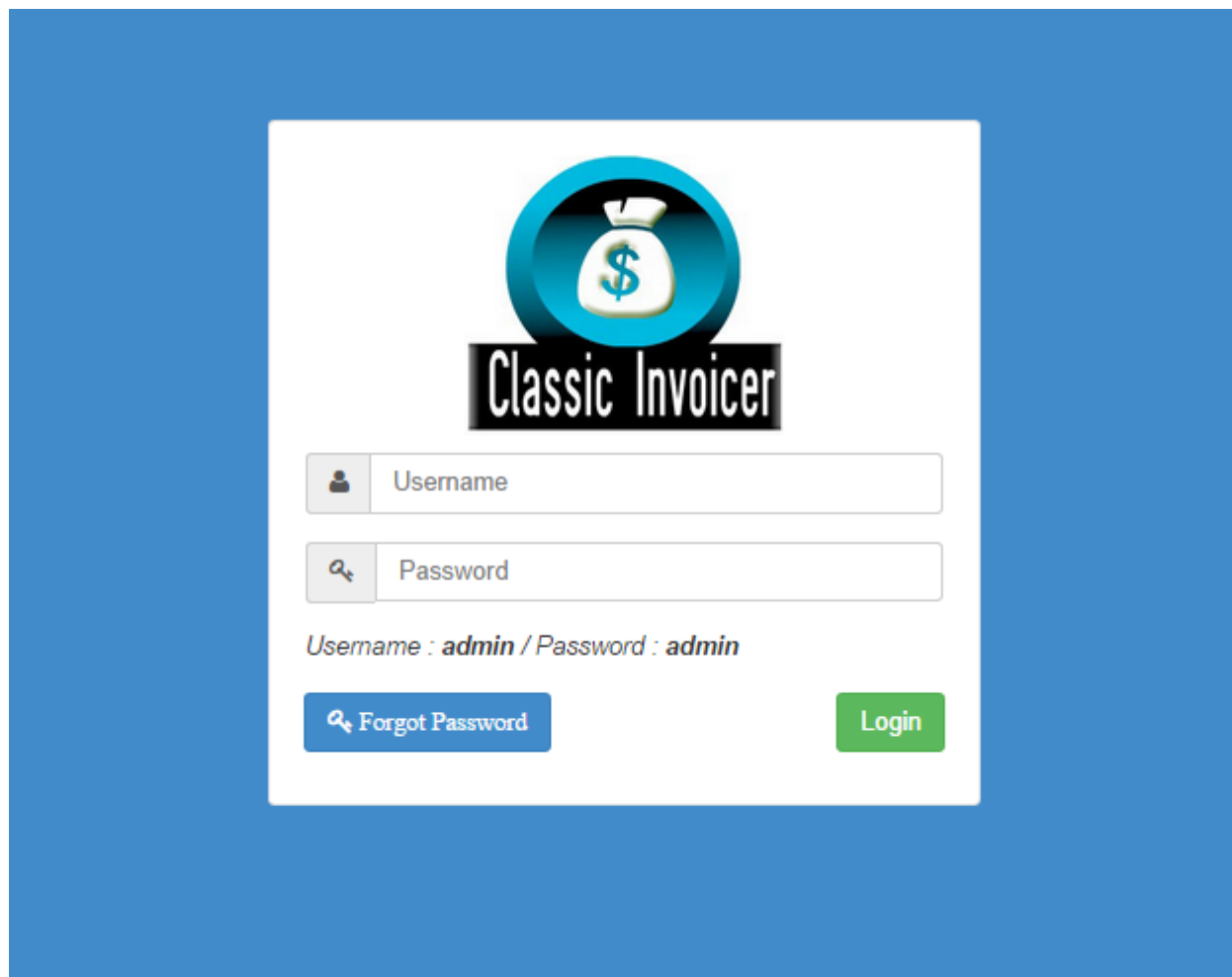
Email

Username

Password

Install

To solve the error you need to either delete or rename the **install folder** so as to disable the installation script and access the system. After this you, should see the login page.



Hurray, that's all!!!!

Feel free to customize the script in whichever way that suits your requirements.

# System Guide

## 1. Dashboard

The Dashboard is the main screen that appears immediately after logging in. The dashboard mainly contains the links to the different functions that the system user will be performing which include:-

- a. Managing Clients
- b. Creating/editing/deleting invoices
- c. Managing products
- d. Generating reports
- e. Generating new system users
- f. Editing system settings
- g. Managing tax rates
- h. Managing payment methods

**CLASSIC INVOICER 1.2**  
Invoicing System

Settings Admin Admin

**Dashboard**

**Total unpaid amount**  
**\$26,400.00**

**Total overdue amount**  
**\$26,400.00**

**Invoices Created** 2  
View all Invoices

**Unpaid Invoices** 1  
View Unpaid Invoices

**Invoices Cancelled** 0

**Invoices Paid** 1  
View Paid Invoices

**Recent Invoices**

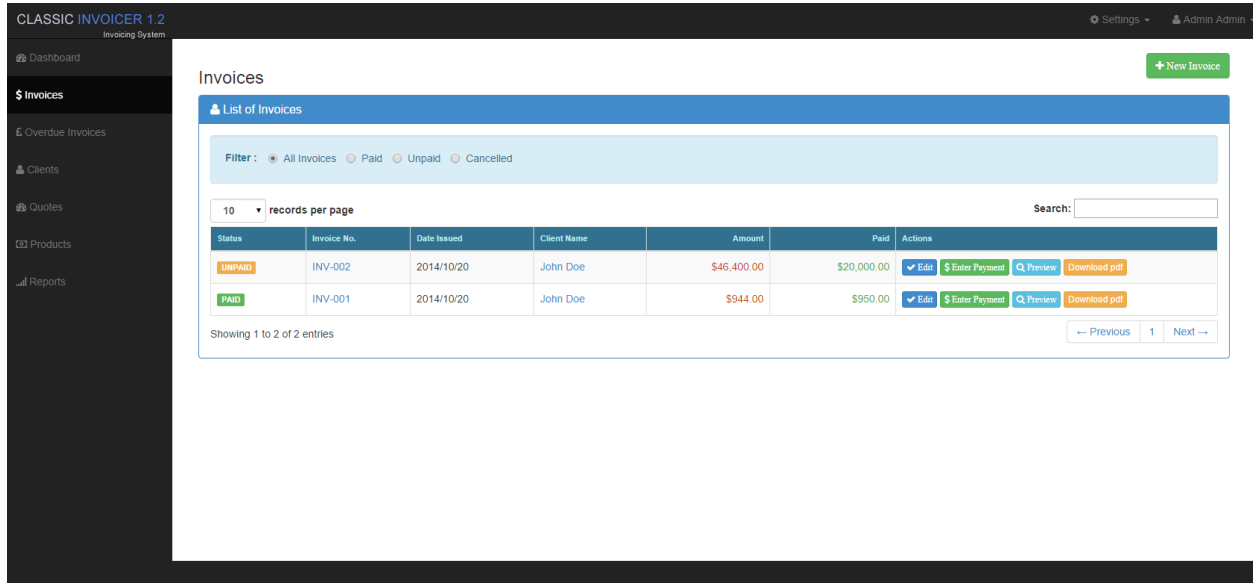
Status	Invoice No.	Date Issued	Due Date	Client Name	Amount	Amount Paid
UNPAID	INV-002	2014/10/20	2014/10/14	John Doe	\$46,400.00	\$20,000.00
PAID	INV-001	2014/10/20	2014/10/31	John Doe	\$944.00	\$950.00

View All Invoices



## 2. Invoices

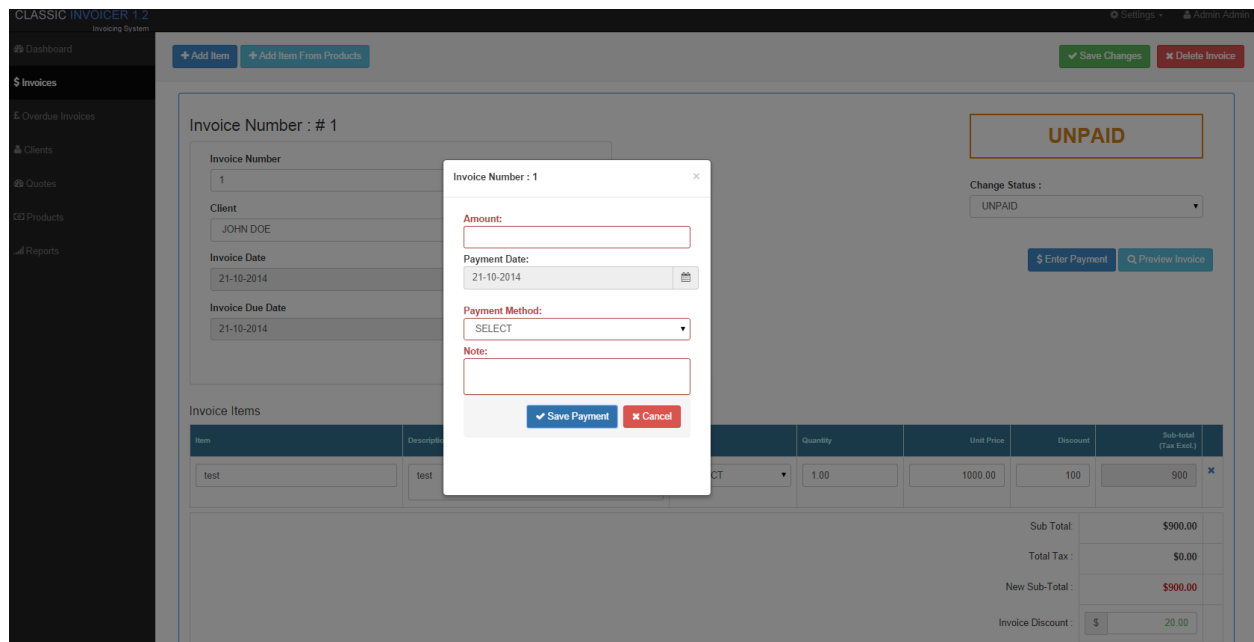
This menu allows the user to view all the invoices and also filter them depending on whether they are paid, unpaid or cancelled.



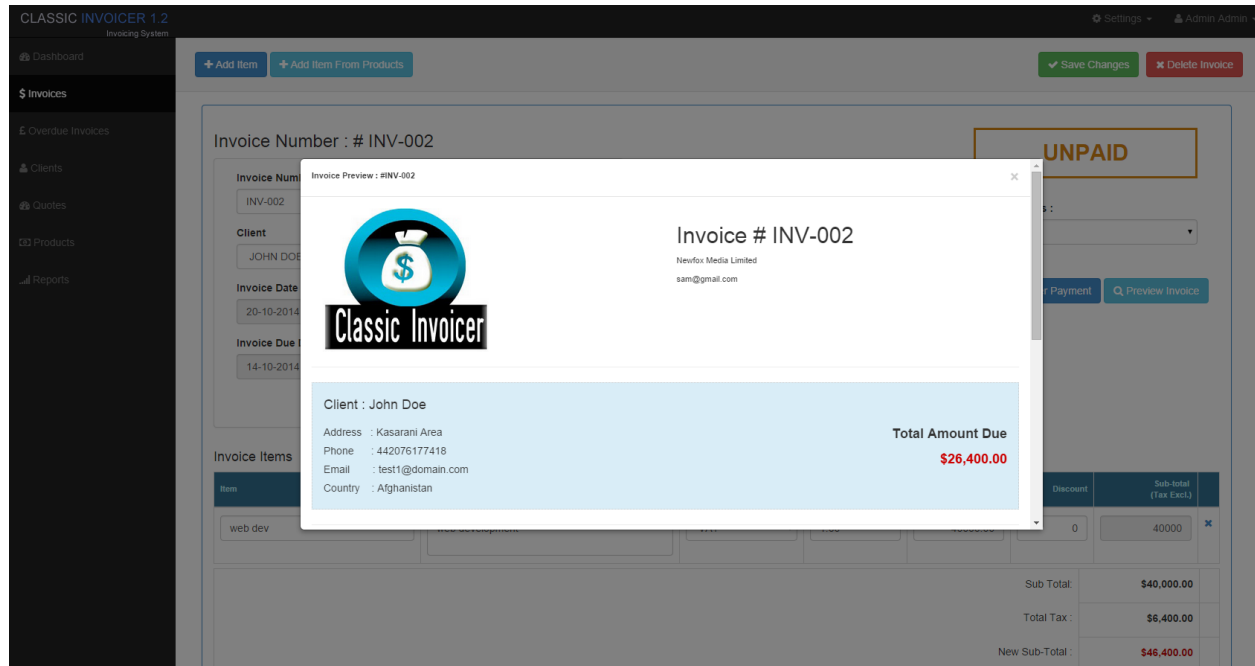
To create a new invoice click on the “new invoice” button on the right hand corner.



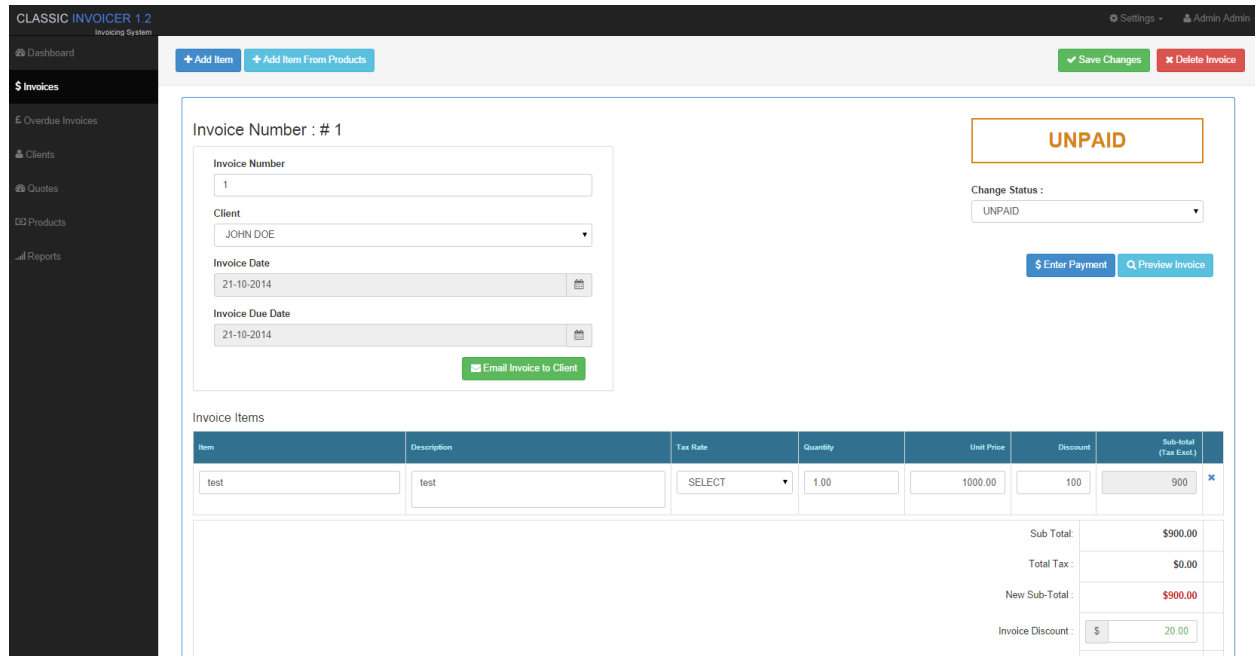
To enter payment for an invoice click on the “Enter payment” button and a popup will be displayed like the one below



To preview an invoice click on the “preview button” and a popup like the one below will appear

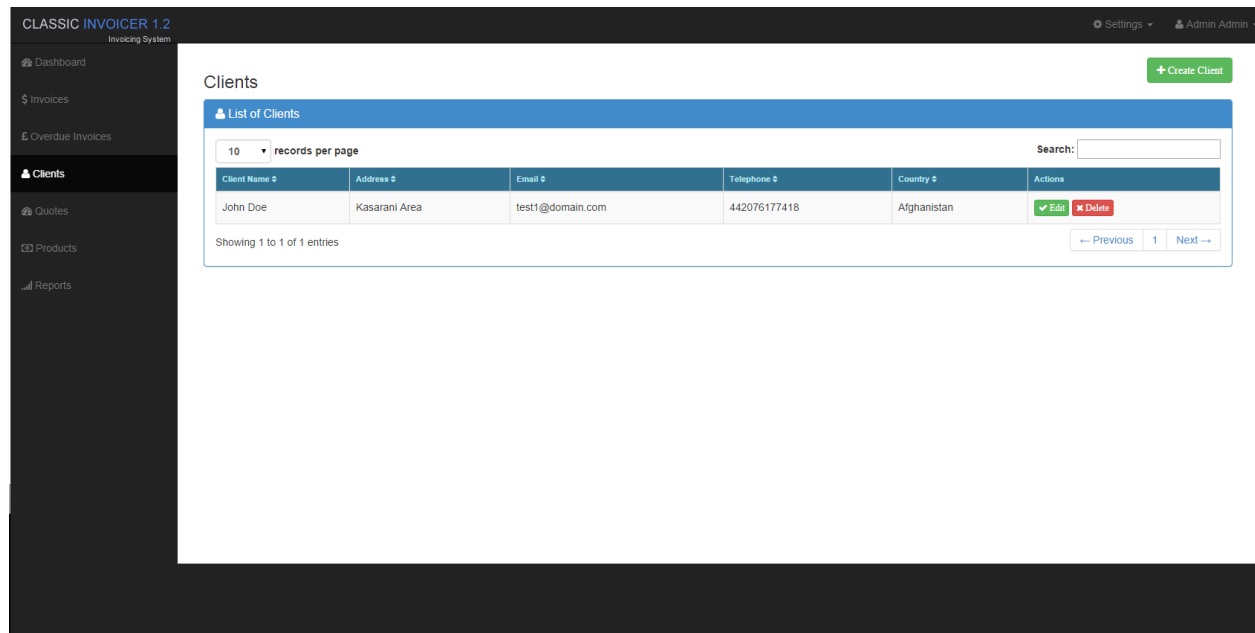


To edit an invoice details, click on the edit button so as to display the invoice in an edit mode so as to be able to make changes to the invoice.



## 3. Clients

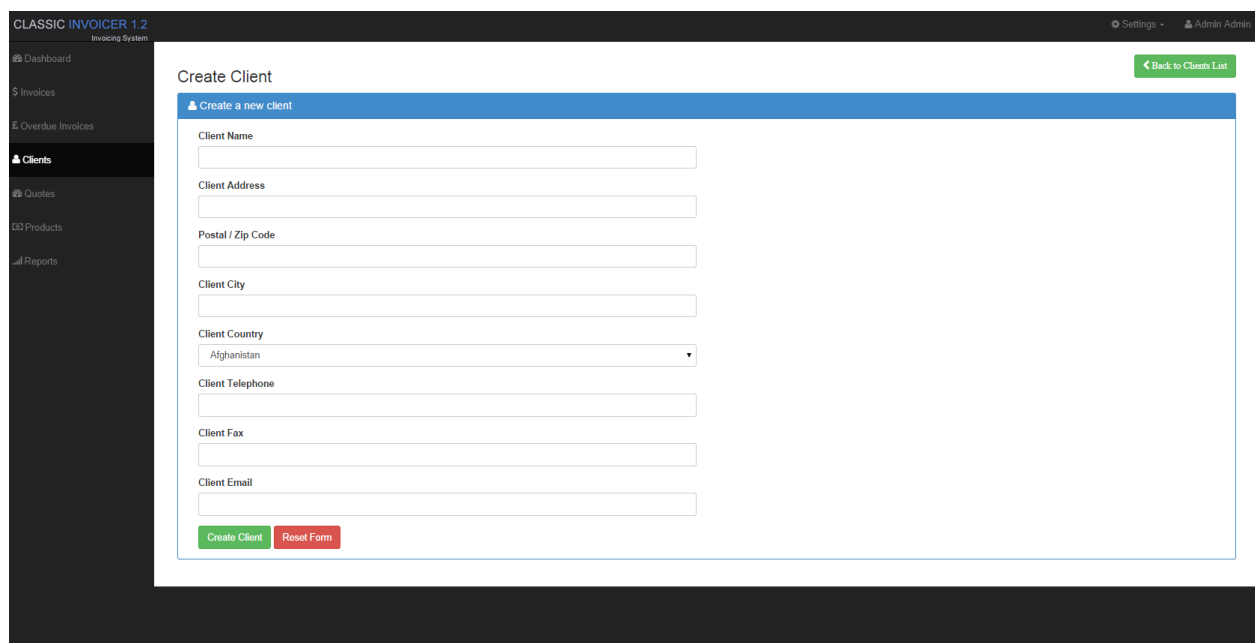
The clients menu allows one to create, edit and delete system clients, when you click on the clients menu, the following window will appear.



To add a client click on the create client link at the top right corner.



The following form will appear for creating a new client.



## 4. Products

The products menu allows one to add, edit and delete system products. When you click on products menu, a list of available products appear.

Products

+ Create Product

List of Products

10 records per page

Search:

Product Name	Product Description	Unit Price	Actions
Website development	developing client websites	40000.00	<a href="#">Edit</a> <a href="#">Delete</a>
Website maintenance	Maintaining of clients websites Maintaining of cl ...	50000.00	<a href="#">Edit</a> <a href="#">Delete</a>

Showing 1 to 2 of 2 entries

[← Previous](#) [1](#) [Next →](#)

To create a new product click on the create product button on the top right corner. And the following page will appear.

Dashboard

Invoices

Overdue Invoices

Clients

**Products**

Reports

### Create Product

Create a new product

**Product Name**

**Product Description**

**Unit Price**

[Create Product](#) [Reset Form](#)

To edit a product click on the edit product link and a form will appear with the product details that you can edit and then save.

## 5. Reports

The reports menu is the menu that allows the user to view the various reports that the classic invoicer is capable of producing, when you click on reports, the following page should appear.

Payments Summary

Client Statement

Invoices Report

Client Contact List

Client :

From :

To :

SELECT

19-11-2013

19-11-2013

Generate Report

Payments Summary

DATE	PAYMENT METHOD	CLIENT	AMOUNT
10-11-2013	orange money	John Doe	\$ 200.00
01-11-2013	Paypal	John Doe	\$ 10,500.00
24-10-2013		John Doe	\$ 50,000.00
TOTAL ( \$ )			\$ 60,700.00

The reports that are generated are four types.

### a. Payments summary

It shows a list of all the payments that have been made so far

Client :

From :

To :

SELECT

19-11-2013

19-11-2013

Generate Report

Payments Summary

DATE	PAYMENT METHOD	CLIENT	AMOUNT
10-11-2013	orange money	John Doe	\$ 200.00
01-11-2013	Paypal	John Doe	\$ 10,500.00
24-10-2013		John Doe	\$ 50,000.00
TOTAL ( \$ )			\$ 60,700.00

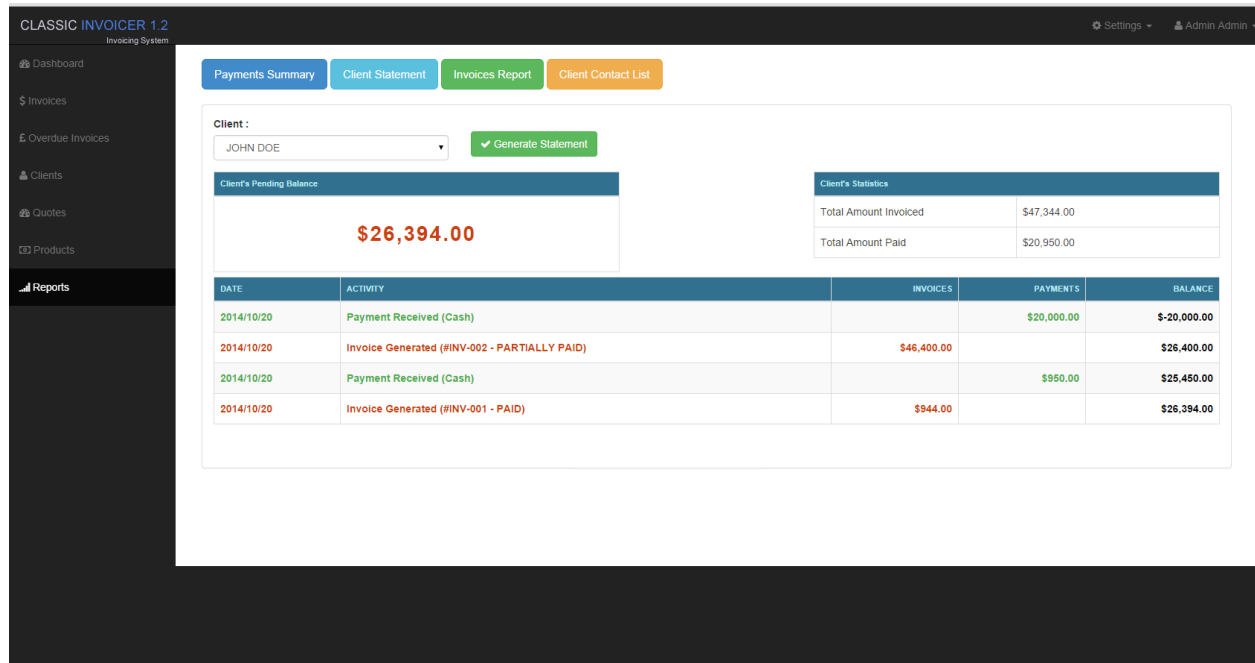
### b. Client statement

The client statement report is basically the records of both invoices and payments based on a particular client.

To view the client statement report click on the client statement button



When you click on the button a page similar to the following page will appear.

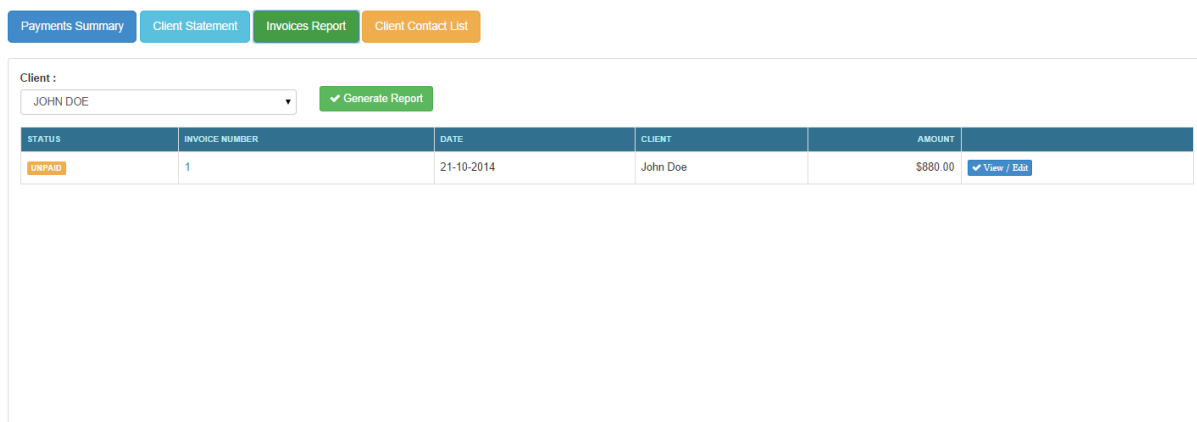


The screenshot shows the "CLASSIC INVOICER 1.2 Invoicing System" interface. On the left is a dark sidebar with navigation links: Dashboard, Invoices, Overdue Invoices, Clients, Quotes, Products, and Reports. The main content area has a top navigation bar with buttons: Payments Summary, Client Statement (highlighted), Invoices Report, and Client Contact List. Below this, the "Client:" section shows "JOHN DOE" and a "Generate Statement" button. The "Client's Pending Balance" is displayed as "\$26,394.00". To the right, "Client's Statistics" shows "Total Amount Invoiced" as \$47,344.00 and "Total Amount Paid" as \$20,950.00. A table at the bottom lists activities with columns for DATE, ACTIVITY, INVOICES, PAYMENTS, and BALANCE.

DATE	ACTIVITY	INVOICES	PAYMENTS	BALANCE
2014/10/20	Payment Received (Cash)		\$20,000.00	\$-20,000.00
2014/10/20	Invoice Generated (#INV-002 - PARTIALLY PAID)	\$46,400.00		\$26,400.00
2014/10/20	Payment Received (Cash)		\$950.00	\$25,450.00
2014/10/20	Invoice Generated (#INV-001 - PAID)	\$944.00		\$26,394.00

### c. Invoices Report

Invoices report displays all the invoices that have been generated so far, to display the invoices report click on the invoices report button. The report can be for all clients or for a particular client. Below is an example of an invoices report.



The screenshot shows the "Invoices Report" page in the "CLASSIC INVOICER 1.2 Invoicing System". The top navigation bar has buttons: Payments Summary, Client Statement, Invoices Report (highlighted), and Client Contact List. Below this, the "Client:" section shows "JOHN DOE" and a "Generate Report" button. A table displays the report with columns: STATUS, INVOICE NUMBER, DATE, CLIENT, AMOUNT, and a "View / Edit" link.

STATUS	INVOICE NUMBER	DATE	CLIENT	AMOUNT	
UNPAID	1	21-10-2014	John Doe	\$880.00	<a href="#">View / Edit</a>

#### d. Client contact list

The client contact list report is a list of all the client's contact information as saved in the database. To view the clients contact list click on the “client contact list” button

Client Contact List

When you click on the above button, the page with the contact details appears, an example page is like the one shown below.

The screenshot displays the 'CLASSIC INVOICER 1.2' web application. On the left is a dark sidebar with a menu containing 'Dashboard', 'Invoices', 'Overdue Invoices', 'Clients', 'Quotes', 'Products', and 'Reports'. The top header bar includes the title 'CLASSIC INVOICER 1.2', a 'Settings' icon, and a user profile 'Admin Admin'. Below the header, a row of four buttons is visible: 'Payments Summary', 'Client Statement', 'Invoices Report', and 'Client Contact List' (which is highlighted in orange). The main content area is titled 'Clients Contact Report' and features a light blue box with the following contact details for 'John Doe':  
Address : 4-5 Bonhill Street  
City : London  
Phone : 442076177418  
Country : Afghanistan  
Email : test1@domain.com  
Fax : +972-3-6209614

## Acknowledgement

I really hope this documentation is detailed enough to get you started on using the system, for any issues that are not covered in this documentation, please contact me via my email. You can also hire me to customize the system for you at a reasonable fee.

Once again, thank you so much for purchasing this script. As I said at the beginning, I'd be glad to help you if you have any questions relating to this script. No guarantees, but I'll do my best to assist. I will also be updating the script every now and then so watch this space ;)

I kindly request you to rate the script on [codecanyon.net](http://codecanyon.net) and I will greatly appreciate.

Enjoy and best of luck!

*Sam Karanja*