



Version 1.0

Invotim documentation

Created: 25/03/2014

By: Sam Karanja

Email: 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.

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Introduction

InvoTim is a web-based project and client management system implemented using CodeIgniter framework. It uses JQuery and MYSQL database. The system will give you the opportunity to calculate the time spent on a particular project and 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

InvoTim 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 OES up and running are: -

- Web Server
- PHP
- MySQL Database Server

Pre-installation Steps

It 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 the web server 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:

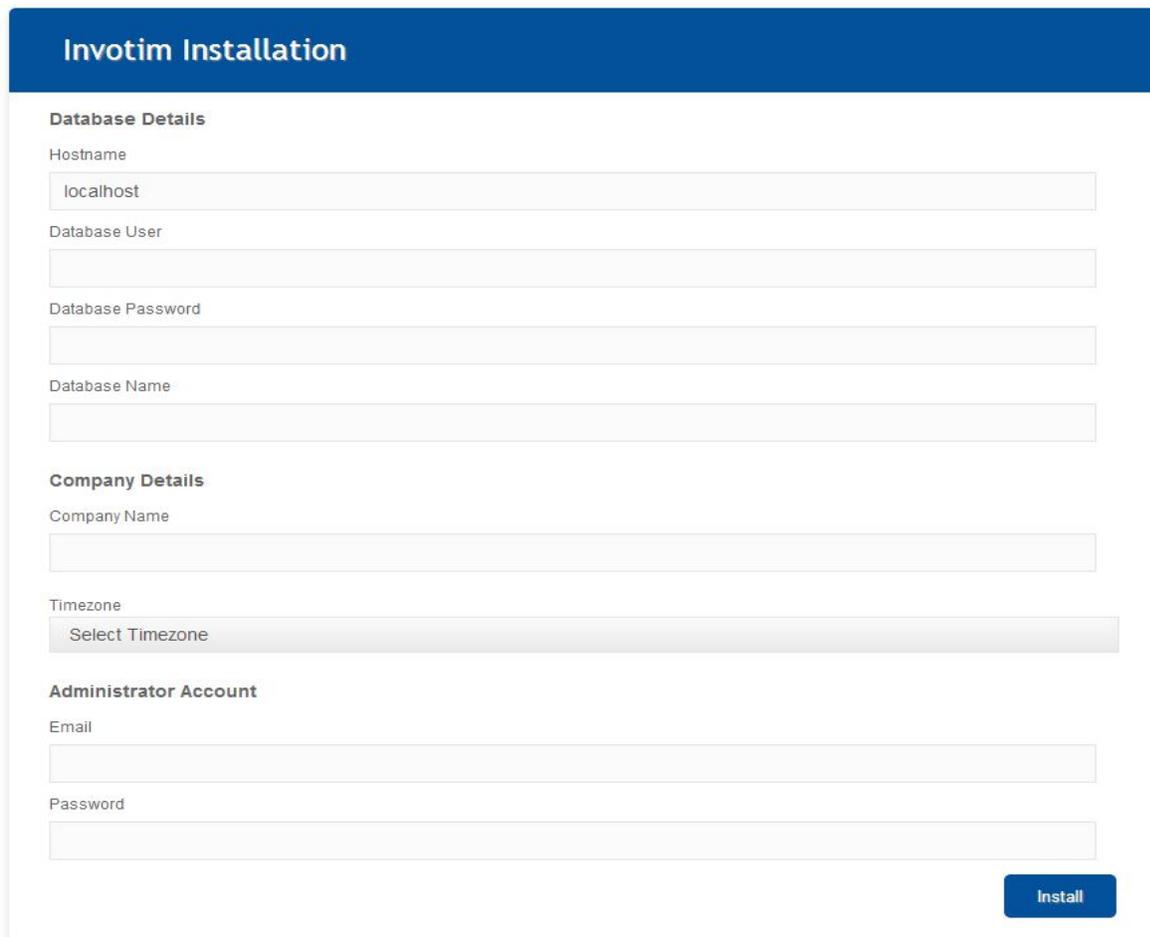
- application (directory)
- system (directory)
- assets (directory)
- database.sql (dump file)
- resources (directory)
- install (directory)
- documentation.pdf
- index.php

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



The screenshot shows the 'Invotim Installation' screen with the following sections and fields:

- Database Details**
 - Hostname:
 - Database User:
 - Database Password:
 - Database Name:
- Company Details**
 - Company Name:
 - Timezone:
- Administrator Account**
 - Email:
 - Password:

An **Install** button is located at the bottom right of the form.

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

Also in this screen you will be able to create a default master administrator account by specifying the email 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

InvoTim Installation

Database Details

Hostname

Database User

Database Password

Database Name

Company Details

Company Name

Timezone

Administrator Account

Email

Password

Click on install button to start the installation process.

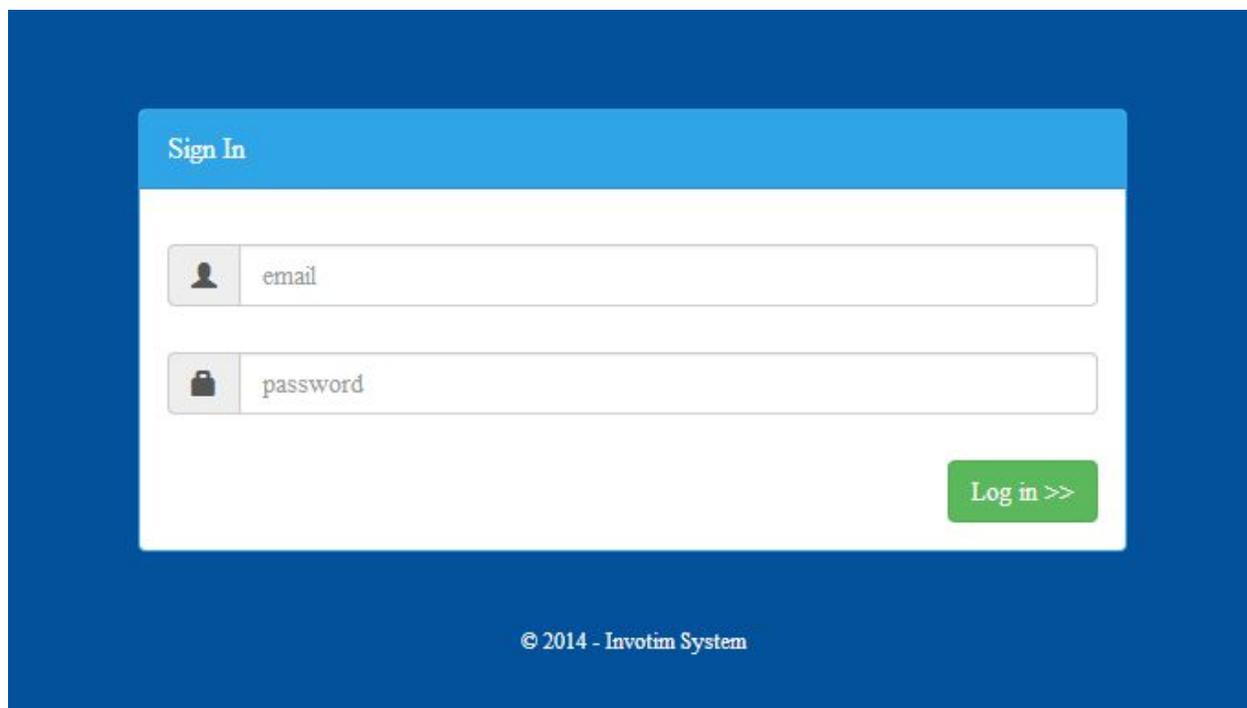
And it's as simple as that, now the InvoTim System has been installed and can be accessed via your web browser.

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

*Please delete or rename **Install** folder*

To solve the error you need to either delete or rename the install folder so that you can be able to access the system. After this you should see the login page.



The screenshot shows a login interface with a blue header and a white sign-in box. The sign-in box contains two input fields: one for email and one for password. A green 'Log in >>' button is located at the bottom right of the sign-in box. The footer of the page reads '© 2014 - InvoTim System'.

Sign In

email

password

Log in >>

© 2014 - InvoTim System

Hurray, that's all!!!!

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

System Guide

Administrator Panel

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. Project timer
- b. Managing Clients
- c. Creating/editing/deleting projects
- d. Creating/editing/deleting invoices
- e. Creating/replying to support tickets
- f. Generating reports
- g. Generating new system users
- h. Editing system settings

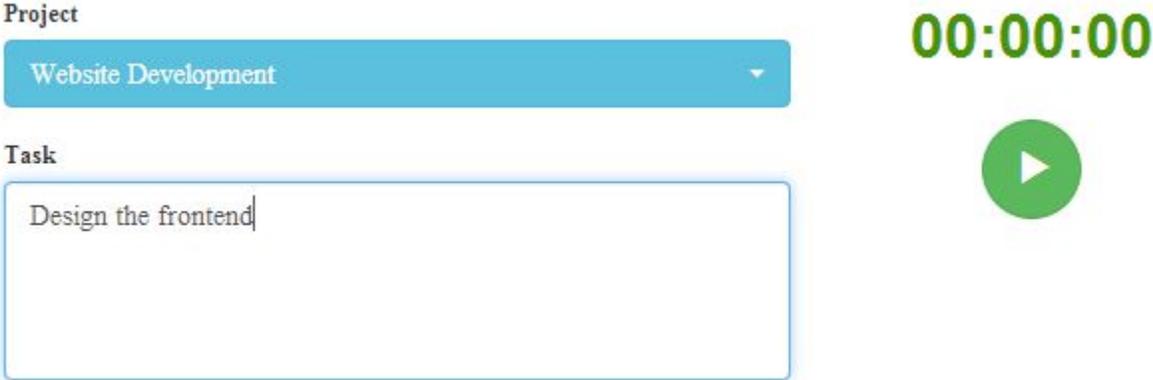
The screenshot displays the Administrator Dashboard. At the top left, it says "Howdy admin!". The dashboard is divided into several sections:

- Statistics:** A grid of four cards showing "Completed Projects" (0/0), "Hours Worked" (00:00:00), "Invoices Created" (0), and "Amount Received" (0).
- Start / Stop Timer:** A section with a "Project" dropdown menu (labeled "Select a project"), a "Task" input field, and a large green play button. A timer shows "00:00:00".
- Latest Time Entries:** A table with columns for "Date", "Project", "Task", and "Hours worked". A message states "No time entries has been recorded at the moment". A "Show All Entries" link is in the top right.

A sidebar on the left contains navigation links: Dashboard, Clients, Projects, Billing, Support, Reports, Change Password, User Accounts, and System Settings. The footer at the bottom center reads "© 2014 - InvoTime System".

2. Project timer

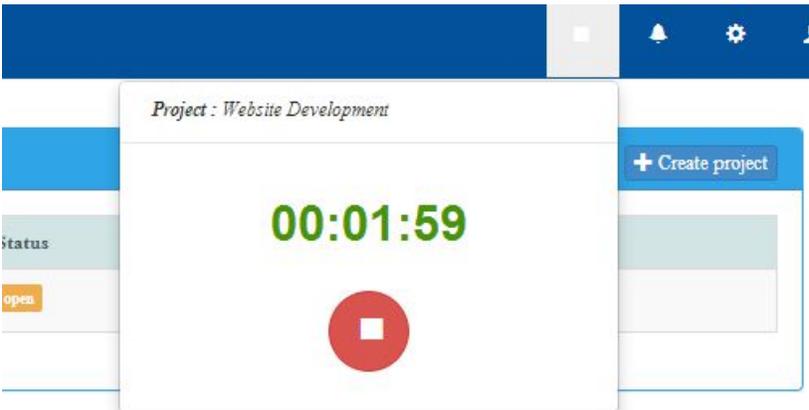
The project timer helps in recording the number of hours spent on a project, to start the time go to the dashboard, select a project and enter the task that you are working on and then click on the start button.



You can stop the timer any time you want, to stop the time use the dashboard stop button

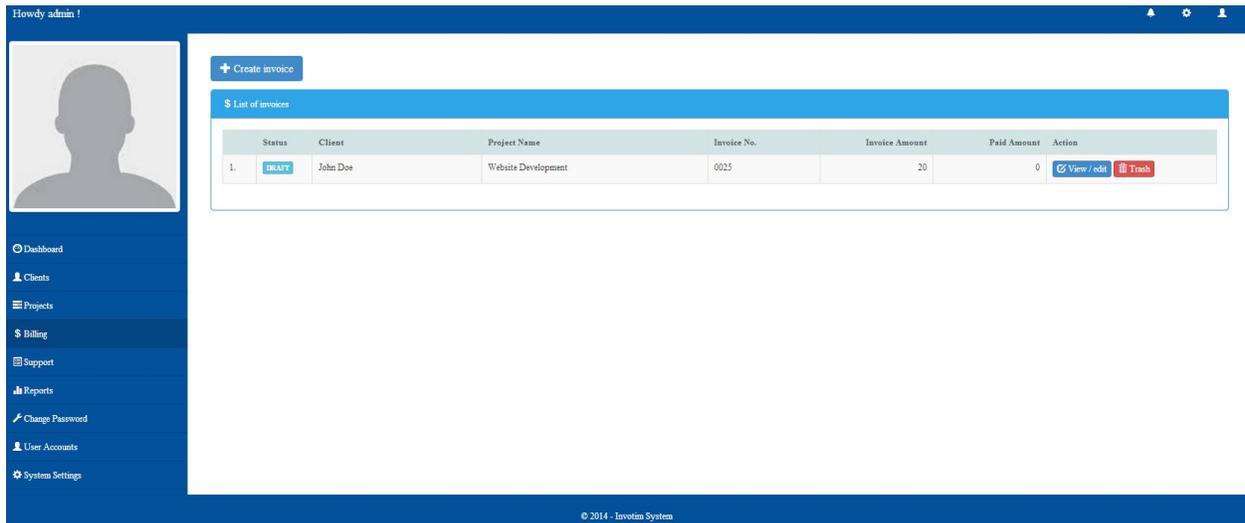


Or you can use the top navigation stop button just beside the notifications icon



3. Billing

This menu allows the user to view all the invoices and also create new ones.



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



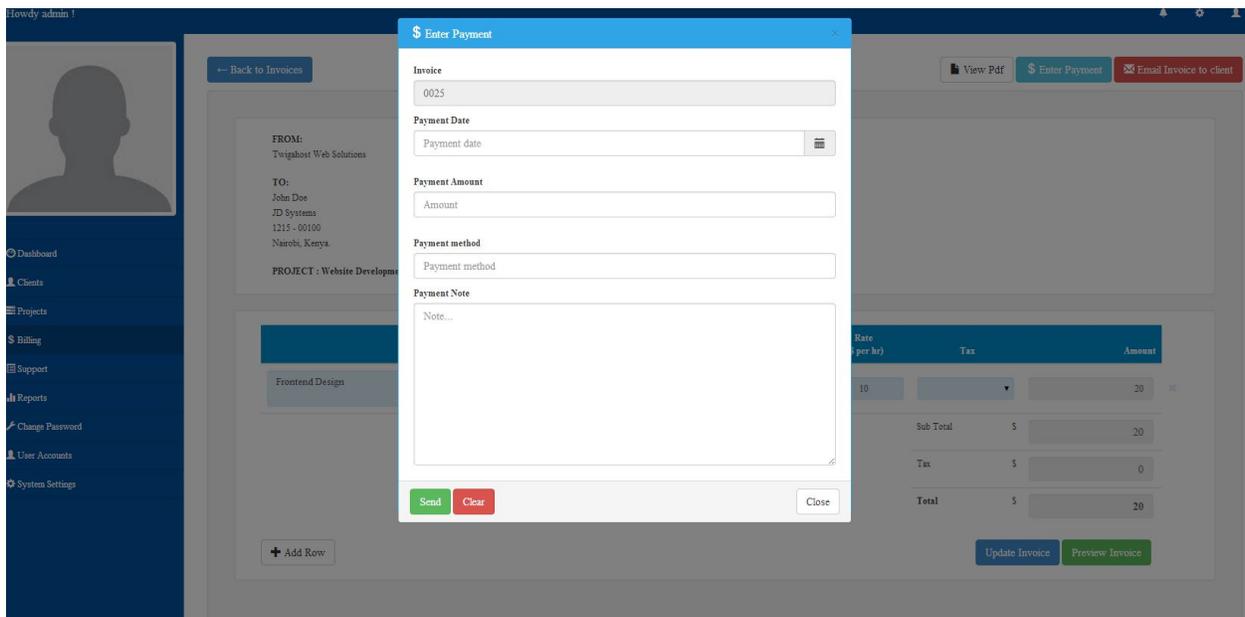
Clicking the create invoice button gives you the project select dropdown and then on selecting the project the new invoice form appears

The screenshot shows the 'Create invoice' form. At the top is a '+ Create invoice' button. Below it is a form with the following fields:

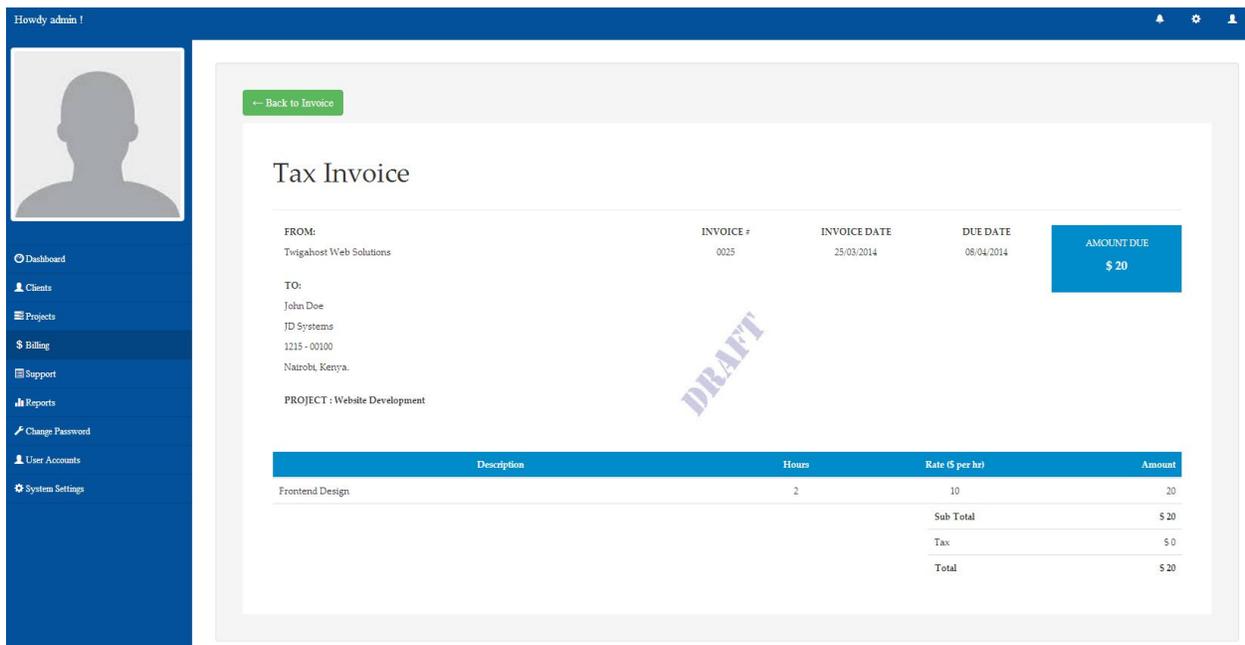
- FROM: Twigahost Web Solutions
- TO: John Doe, JD Systems, 1215 - 00100, Nairobi, Kenya.
- PROJECT: Website Development

Below the form is a table with columns: Work Completed, Hours, Rate (\$ per hr), Tax, and Amount. The table contains one row for 'Frontend design' with 20 hours and a rate of 10, resulting in an amount of 200.00. Below the table are buttons for '+ Add Row', 'Create Invoice', 'Save as Draft', 'Preview Invoice', and 'Cancel'. A summary section shows Sub Total: \$ 200.00, Tax: \$ 0.00, and Total: \$ 200.00.

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 an invoice preview like the one below will appear



To view the pdf version of the invoice click on the view pdf button and the invoice will be displayed in pdf format like the one shown below

un | [Balance: Please sign in](#) | [Hire Freelancers & F...](#) | [wordpress Plugins &...](#) | [welcome to Codeig...](#) | [Components & boots...](#) | [viewing snippet nav...](#) | [Six im](#)

Tax Invoice

FROM: Twigahost Web Solutions	INVOICE # 0025	INVOICE DATE 25/03/2014	DUE DATE 08/04/2014	AMOUNT DUE \$ 20
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TO:
John Doe
JD Systems
1215 - 00100
Nairobi, Kenya.

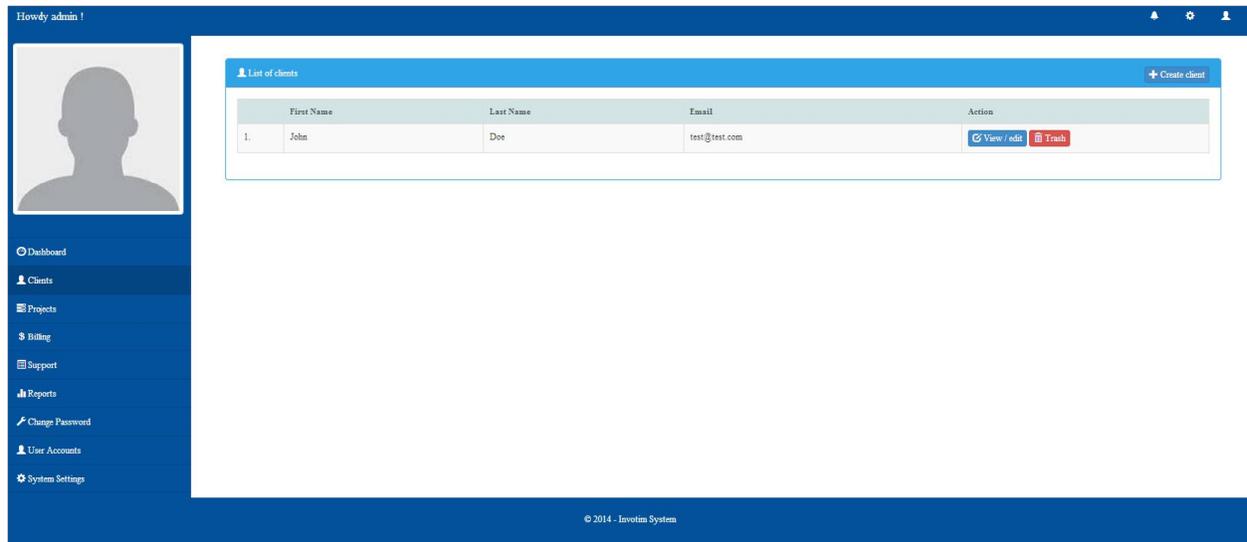
PROJECT : Website Development

Description	Hours	Rate (\$ per hr)	Amount
Frontend Design	2	10	20
Sub Total			\$ 20
Tax			\$ 0
Amount Paid			\$ 0
Total Due			\$ 20

UNPAID

4. 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.

The screenshot shows the 'Create client' form. It has a blue header with a 'Back to clients' link. The form is divided into three sections:

- Personal Details:** Fields for First Name, Last Name, Email, Password, and Confirm Password.
- Contact Details:** Fields for Address, Company, City, and Country (a dropdown menu currently showing 'Afghanistan').
- Other Details:** Field for Hourly Rate.

A 'Save' button is located at the bottom right of the form.

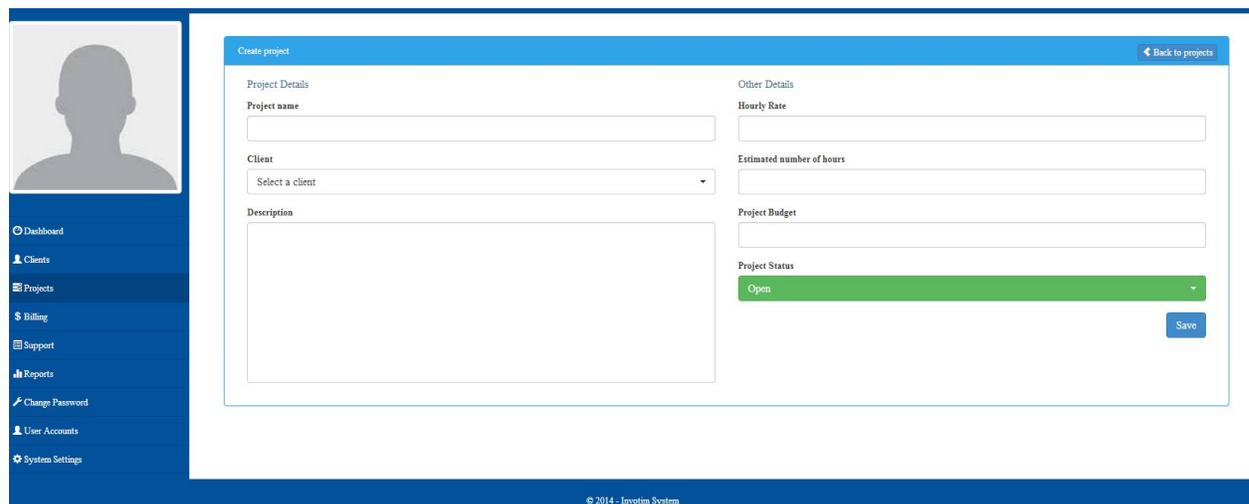
5. Projects

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



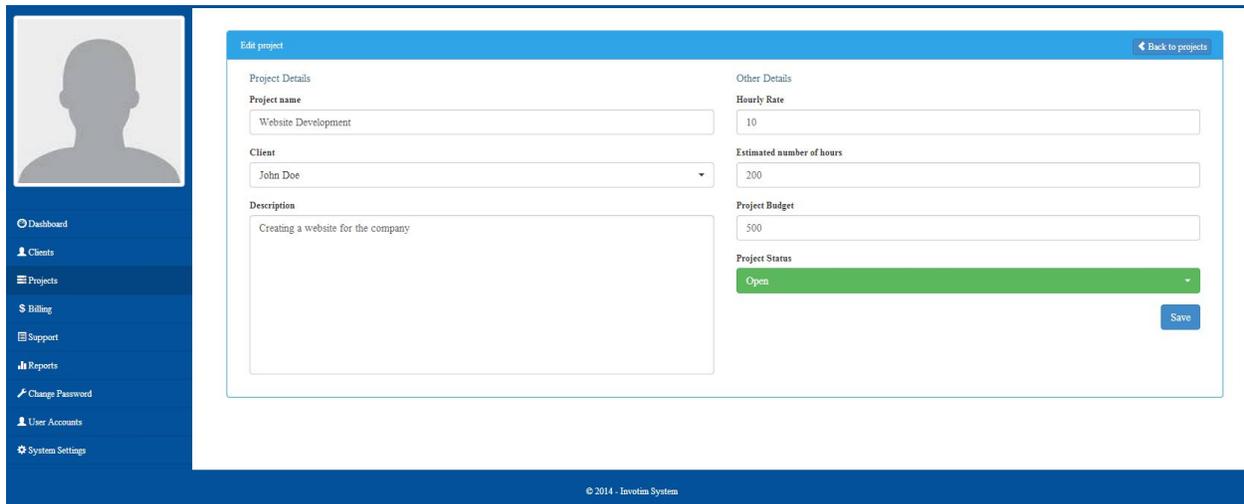
Project Name	Client	Status	Action
1. Website Development	John Doe	Open	View / edit Trash

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



The 'Create project' form is displayed within a sidebar navigation system. The sidebar includes options like Dashboard, Clients, Projects, Billing, Support, Reports, Change Password, User Accounts, and System Settings. The main form area is titled 'Create project' and has a 'Back to projects' link. It is divided into 'Project Details' and 'Other Details' sections. The 'Project Details' section includes fields for Project name, Client (a dropdown menu), and Description. The 'Other Details' section includes fields for Hourly Rate, Estimated number of hours, Project Budget, and Project Status (a dropdown menu currently set to 'Open'). A 'Save' button is located at the bottom right of the form. The footer of the page reads '© 2014 - Invoitem System'.

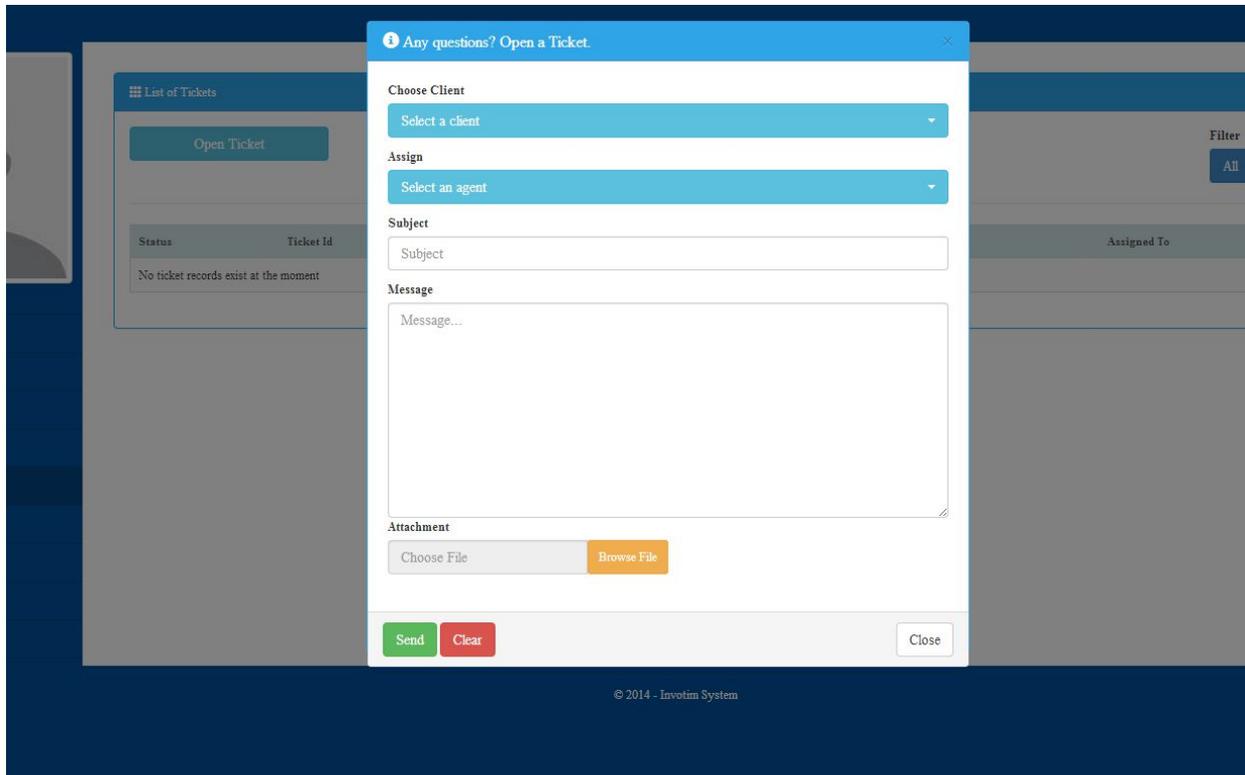
To edit a project click on the edit link and a form will appear with the project details that you can edit and then save.



The 'Edit project' form is displayed within the same sidebar navigation system. The main form area is titled 'Edit project' and has a 'Back to projects' link. It is divided into 'Project Details' and 'Other Details' sections. The 'Project Details' section includes fields for Project name (pre-filled with 'Website Development'), Client (a dropdown menu pre-filled with 'John Doe'), and Description (pre-filled with 'Creating a website for the company'). The 'Other Details' section includes fields for Hourly Rate (pre-filled with '10'), Estimated number of hours (pre-filled with '200'), Project Budget (pre-filled with '500'), and Project Status (a dropdown menu pre-filled with 'Open'). A 'Save' button is located at the bottom right of the form. The footer of the page reads '© 2014 - Invoitem System'.

6. Support Tickets

This section helps the administration to open/reply to clients support tickets, to view the existing tickets, click on support menu. To open a new ticket, click on Open Ticket and a ticket form like the one shown below will appear.



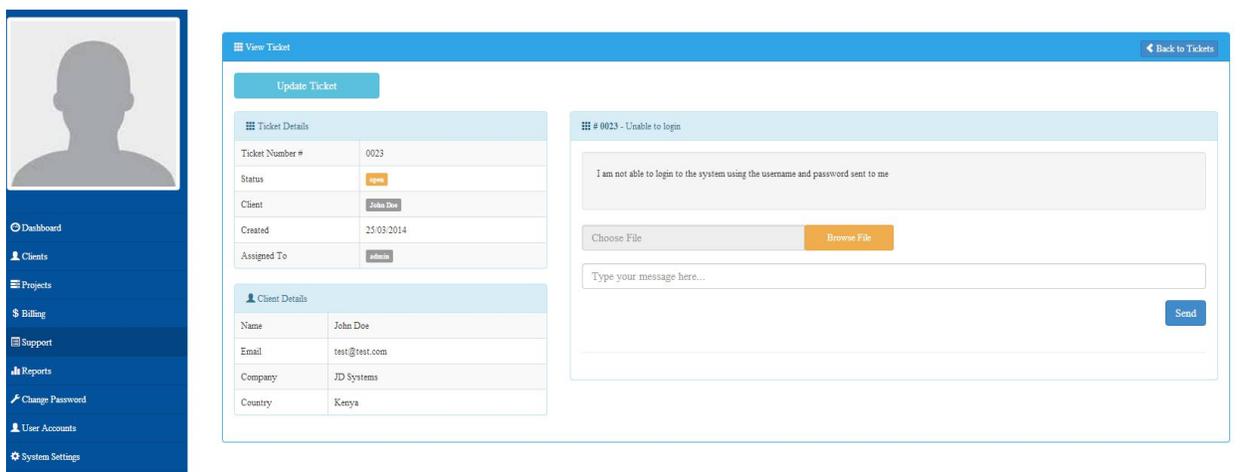
The screenshot shows a modal window titled "Any questions? Open a Ticket." with a close button in the top right corner. The form contains the following fields and controls:

- Choose Client:** A dropdown menu with the text "Select a client".
- Assign:** A dropdown menu with the text "Select an agent".
- Subject:** A text input field with the placeholder text "Subject".
- Message:** A large text area with the placeholder text "Message...".
- Attachment:** A section with a "Choose File" button and a "Browse File" button.
- Buttons:** "Send" (green), "Clear" (red), and "Close" (white) buttons at the bottom.

The background shows a "List of Tickets" table with columns for "Status" and "Ticket Id", and a message stating "No ticket records exist at the moment".

© 2014 - InvoTim System

To reply to a ticket, click on the view button and the ticket details will be displayed and a reply form also.



The screenshot shows the "View Ticket" page. On the left is a sidebar menu with options: Dashboard, Clients, Projects, Billing, Support, Reports, Change Password, User Accounts, and System Settings. The main content area is titled "View Ticket" and includes a "Back to Tickets" link.

The page displays the following information:

- Update Ticket:** A button at the top left.
- Ticket Details:** A table with the following data:

Ticket Number #	0023
Status	Open
Client	John Doe
Created	25/09/2014
Assigned To	Admin
- Client Details:** A table with the following data:

Name	John Doe
Email	test@test.com
Company	JD Systems
Country	Kenya
- Ticket Description:** A text area containing the message: "I am not able to login to the system using the username and password sent to me".
- Attachment:** A section with a "Choose File" button and a "Browse File" button.
- Reply Form:** A text input field with the placeholder text "Type your message here..." and a "Send" button.

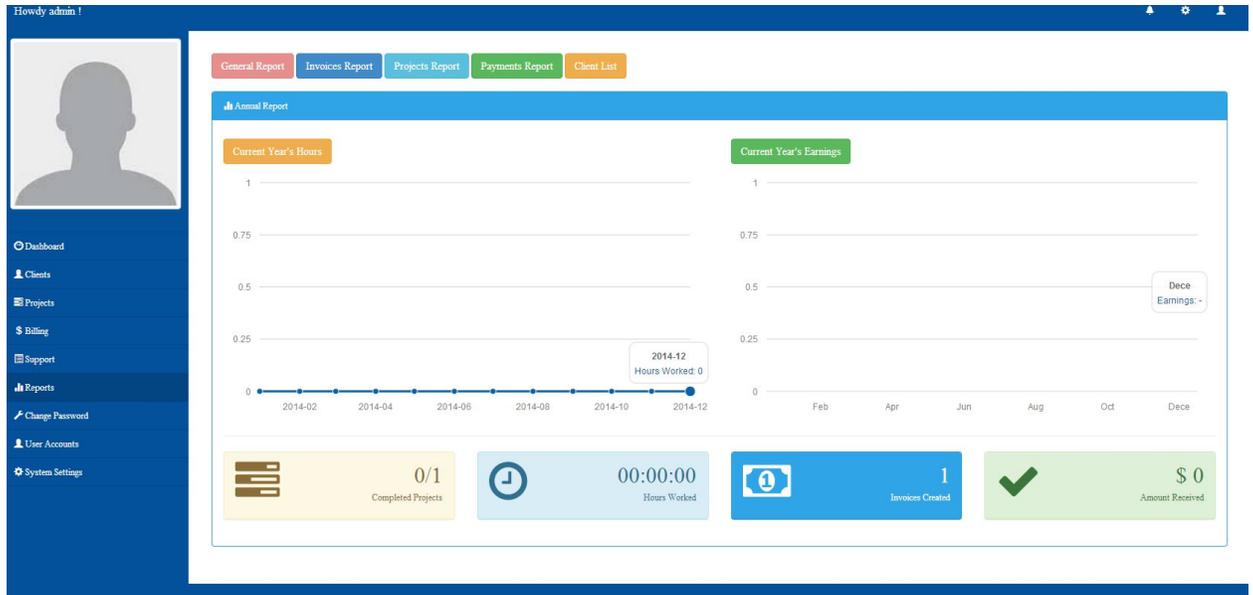
7. Reports

The reports menu is the menu that allows the admin to view the various reports that the InvoTim is capable of producing.

The reports that are generated are five types.

a. General Report

This is a report of the current years' statistics that are displayed in graphical format



b. Invoices Report

The invoices report displays a list of all the invoices that have been generated and their clients and for which project. The report can be exported to pdf by clicking 

The screenshot displays the 'Invoices Report' section. At the top, there are navigation tabs for 'General Report', 'Invoices Report', 'Projects Report', 'Payments Report', and 'Client List'. The main content area is titled 'Invoices List' and contains a table with the following data:

Status	Client	Project Name	Invoice No.	Invoice Amount	Paid Amount
DRAFT	John Doe	Website Development	0025	\$ 20	\$ 0

A PDF icon is visible in the top right corner of the table area.

c. Projects Report

The Projects report displays a list of all the projects that have been added and their clients and for which client. The report can be exported to pdf by clicking 

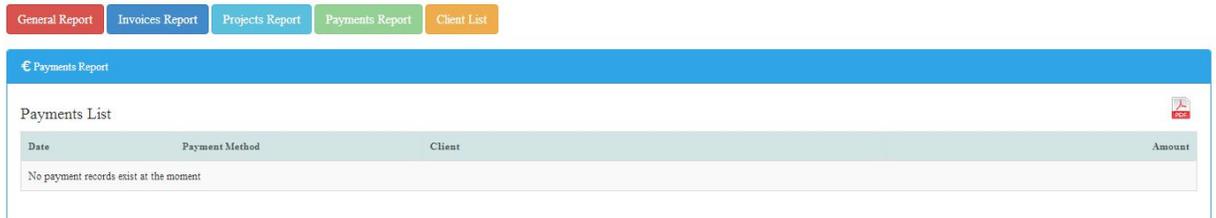


The screenshot shows a navigation bar with buttons for 'General Report', 'Invoices Report', 'Projects Report', 'Payments Report', and 'Client List'. Below the navigation bar is a header for 'Projects Report' with a PDF export icon. The main content area contains a table with the following data:

Project Name	Client	Status
Website Development	John Doe	open

d. Payments Report

The payments report displays a list of all the payments that have been made from which client. The report can be exported to pdf by clicking 



The screenshot shows a navigation bar with buttons for 'General Report', 'Invoices Report', 'Projects Report', 'Payments Report', and 'Client List'. Below the navigation bar is a header for 'Payments Report' with a PDF export icon. The main content area contains a table with the following data:

Date	Payment Method	Client	Amount
No payment records exist at the moment			

e. Client list

The client 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 list" button

When you click on the above button, the page with the contact details appears, an example page is like the one shown below. The report can be exported to pdf by clicking 



The screenshot shows a navigation bar with buttons for 'General Report', 'Invoices Report', 'Projects Report', 'Payments Report', and 'Client List'. Below the navigation bar is a header for 'Clients List' with a PDF export icon. The main content area contains a table with the following data:

John Doe	
Company	JD Systems
Email	test@test.com
Address	1215 - 00100
City	Nairobi
Country	Kenya

8. System settings

This is where you configure the system settings, there three main categories of settings

a. System configuration

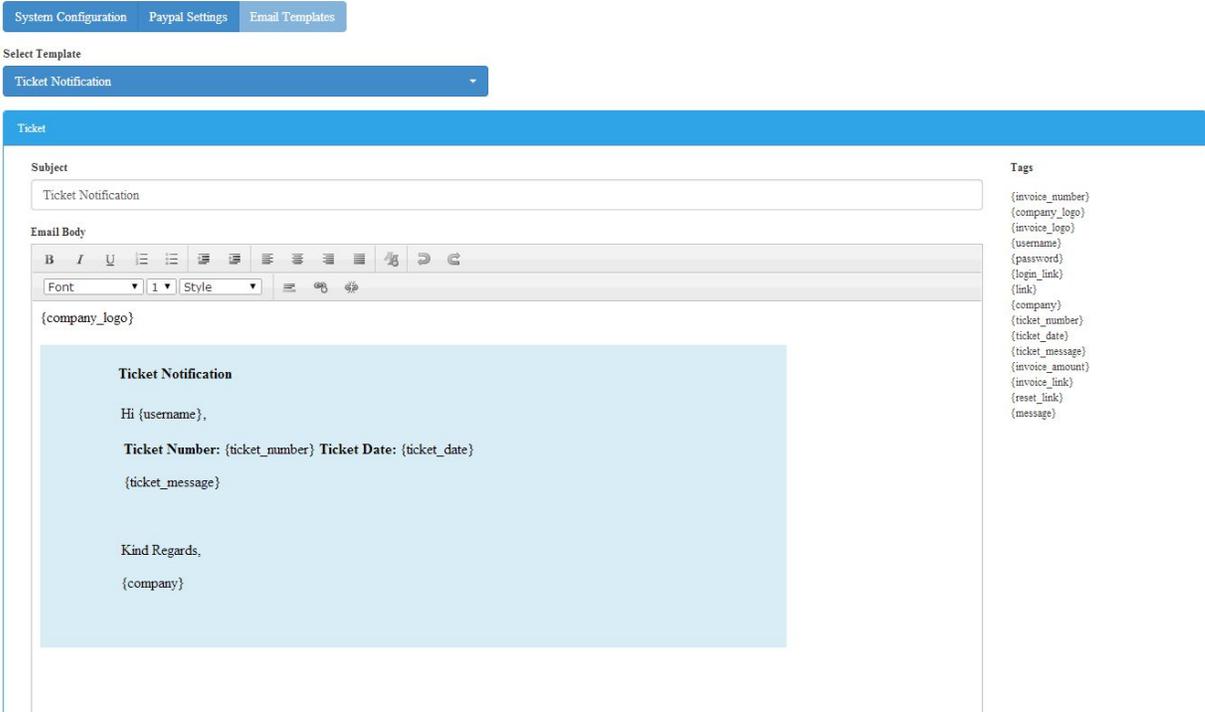
This is where you set the system general configurations like company name, logos, email, system timezone etc.

b. Paypal Settings

This is where you set the paypal details that will be used by the clients in making payments

c. Email Templates

This is where you set the email html templates that will be used in sending various email notifications



- Tags
- {invoice_number}
 - {company_logo}
 - {invoice_logo}
 - {username}
 - {password}
 - {login_link}
 - {link}
 - {company}
 - {ticket_number}
 - {ticket_date}
 - {ticket_message}
 - {invoice_amount}
 - {invoice_link}
 - {reset_link}
 - {message}

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 and I will greatly appreciate.

Enjoy and best of luck!

Sam Karanja