Invotim

Project Management

Version 1.0

Invotim documentation

Created: 25/03/2014

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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:

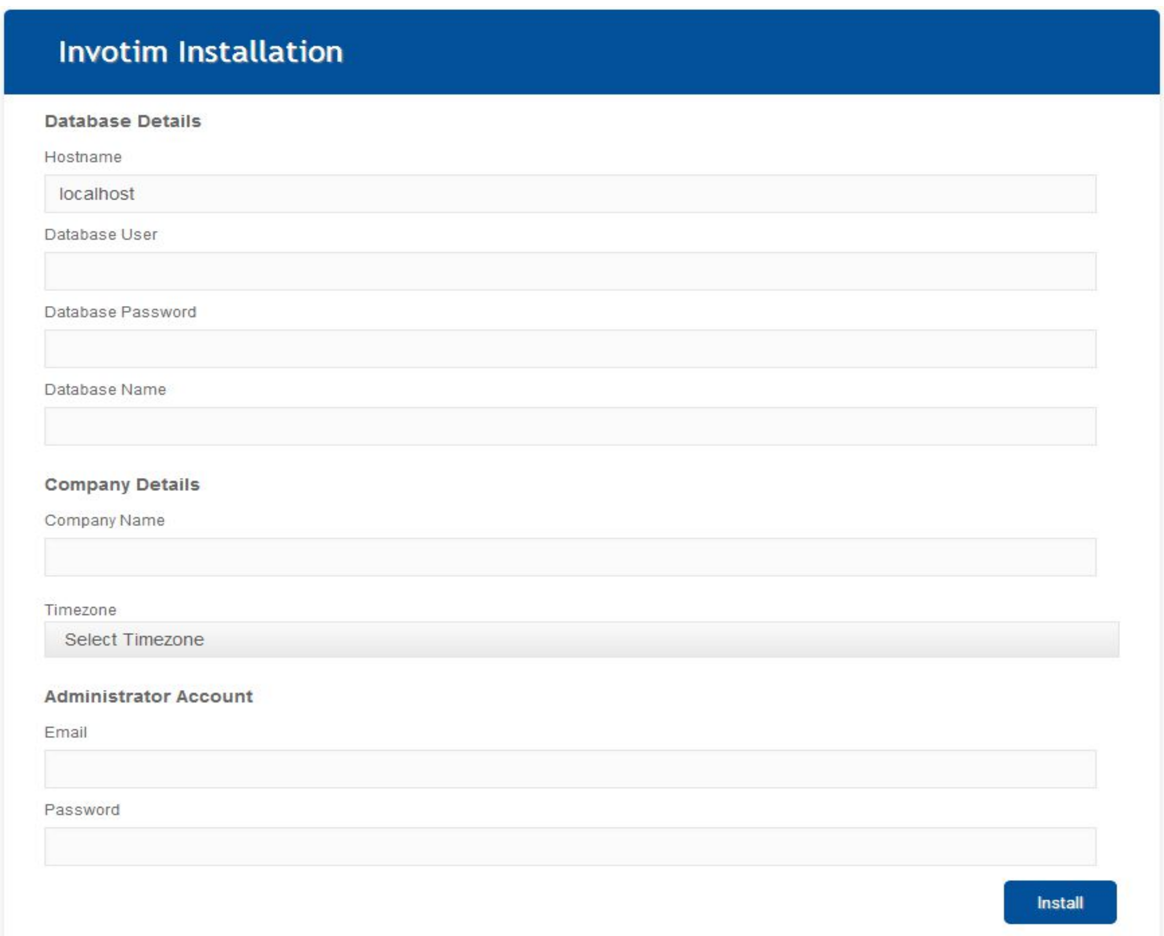
- application (directory)
- system (directory)
- assets (directory)
- database.sql (dump file)
- resources (directory)
- install (directory)
- documentation.pdf
- index.php

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

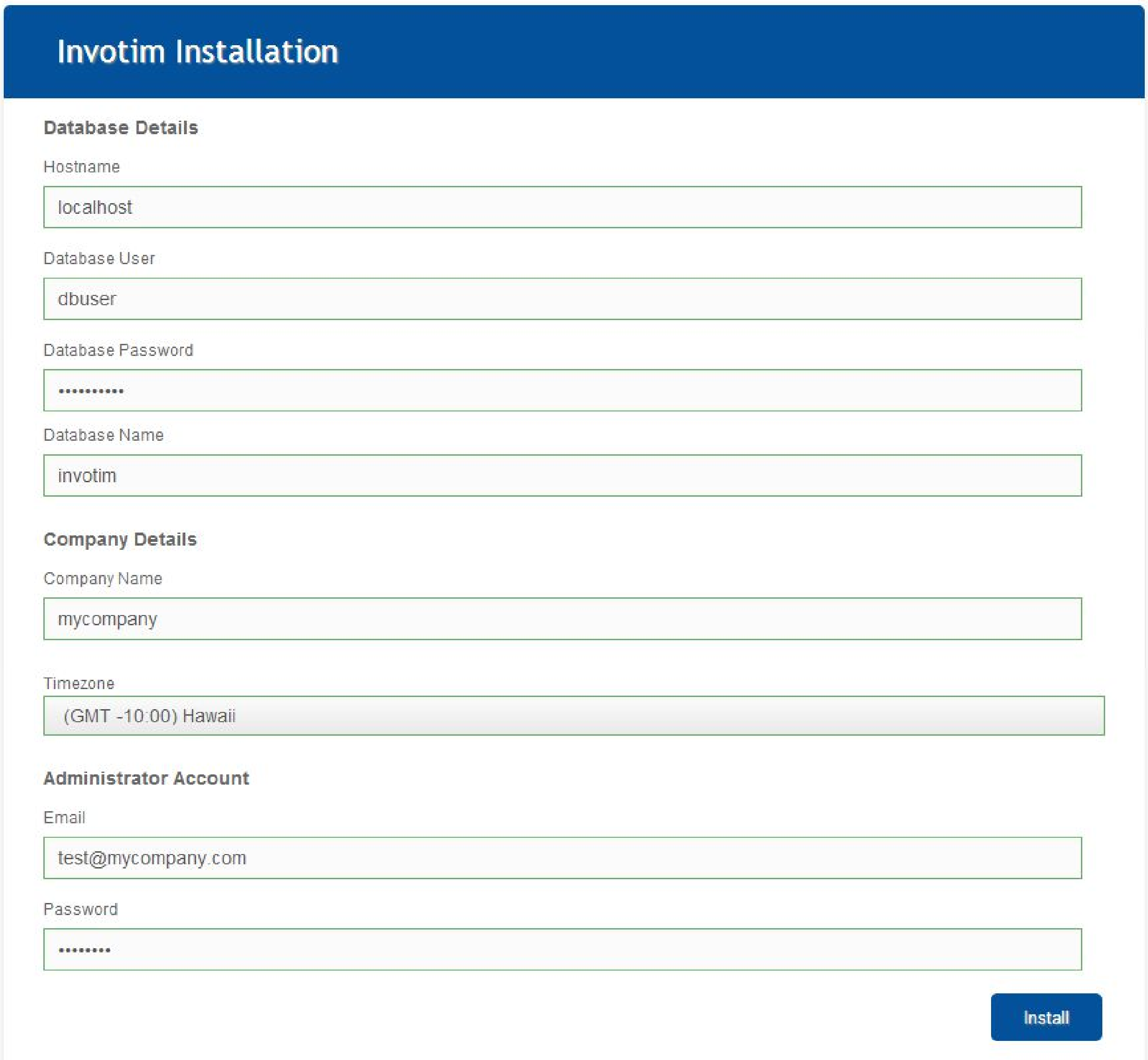
http://[yourdomain]/[youappfolder]/install

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



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, you form will look like this



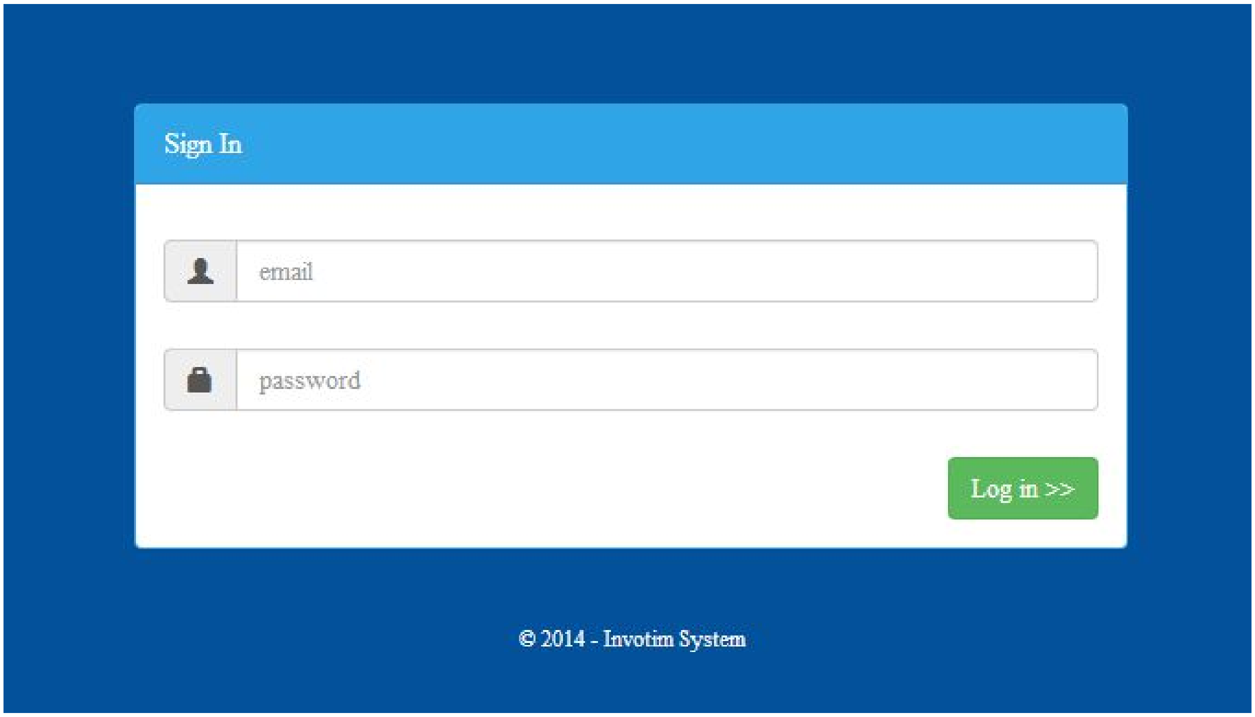
Click on install button to start the installation process.

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

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.



Hurray, that's all!!!!

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

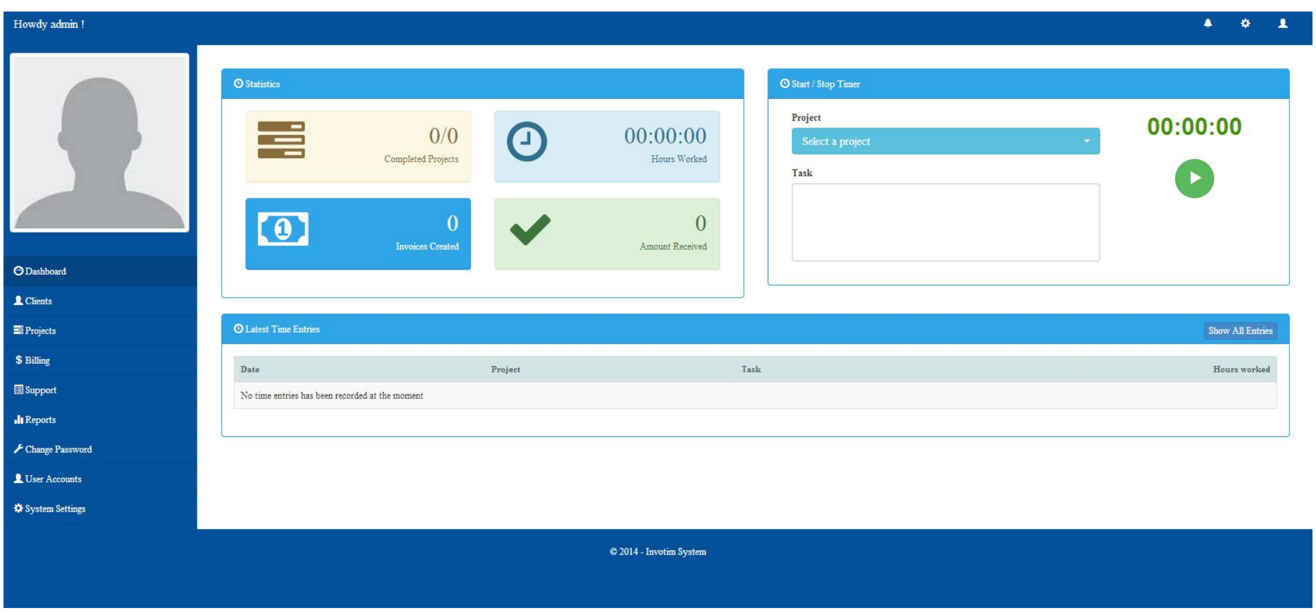
System Guide

Administrator Panel

1. Dashboard

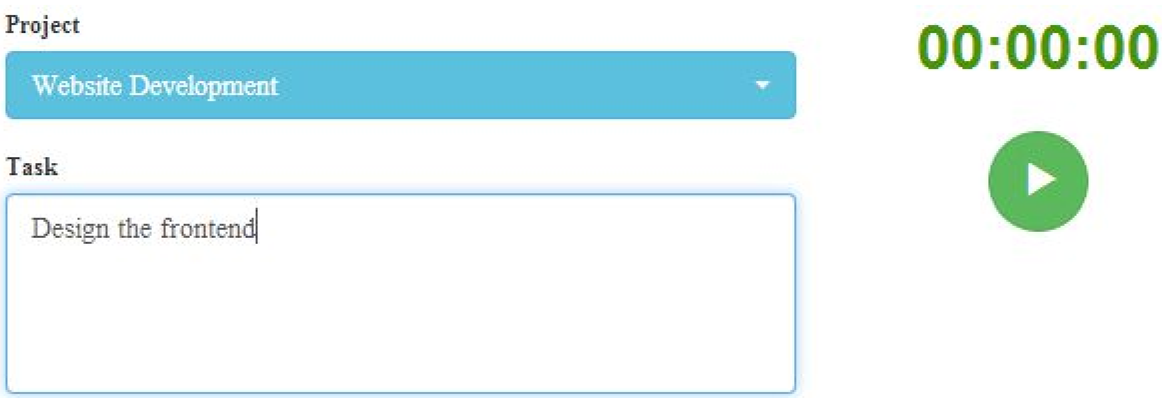
The Dashboard is the main screen that appears immediately after logging in. The dashboard mainly contains the links to the different functions that the system user will be performing which include:-

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



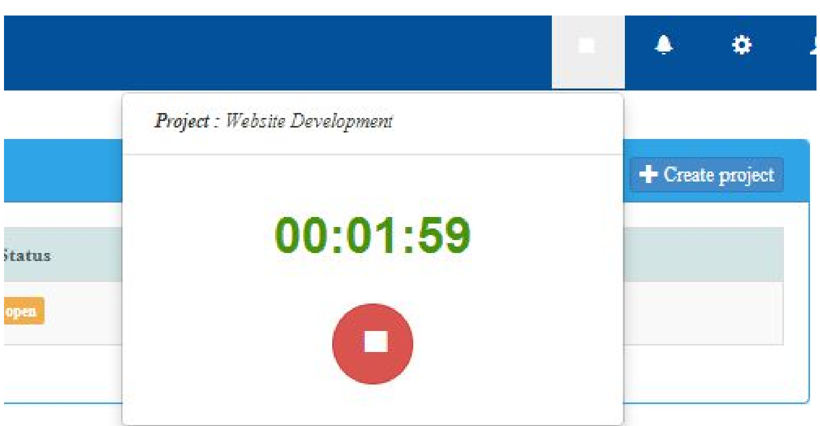
2. Project timer

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.



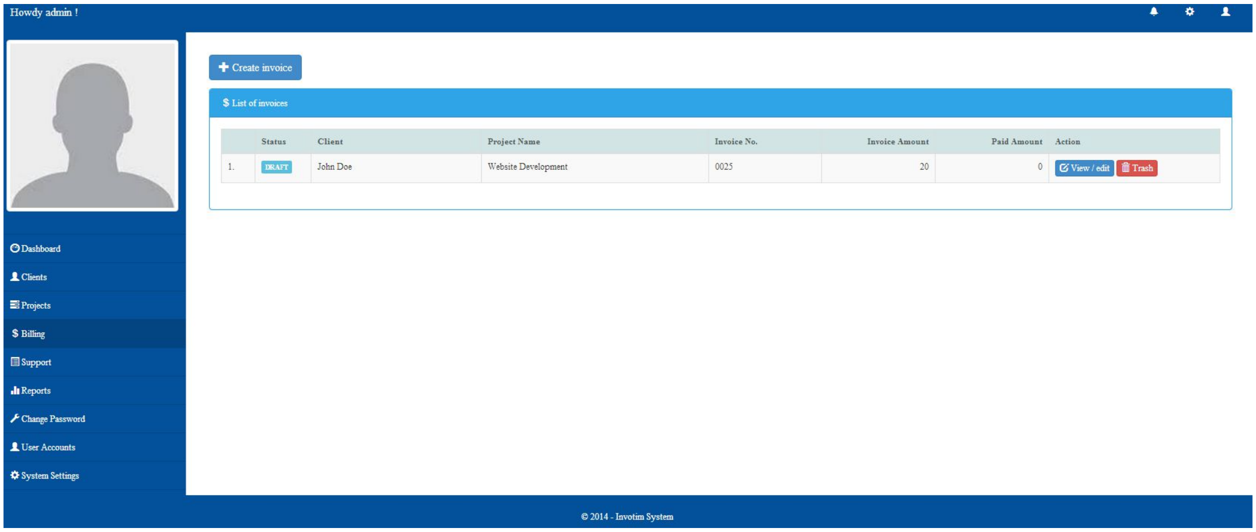
You can stop the timer any time you want, to stop the time use the dashboard stop button

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



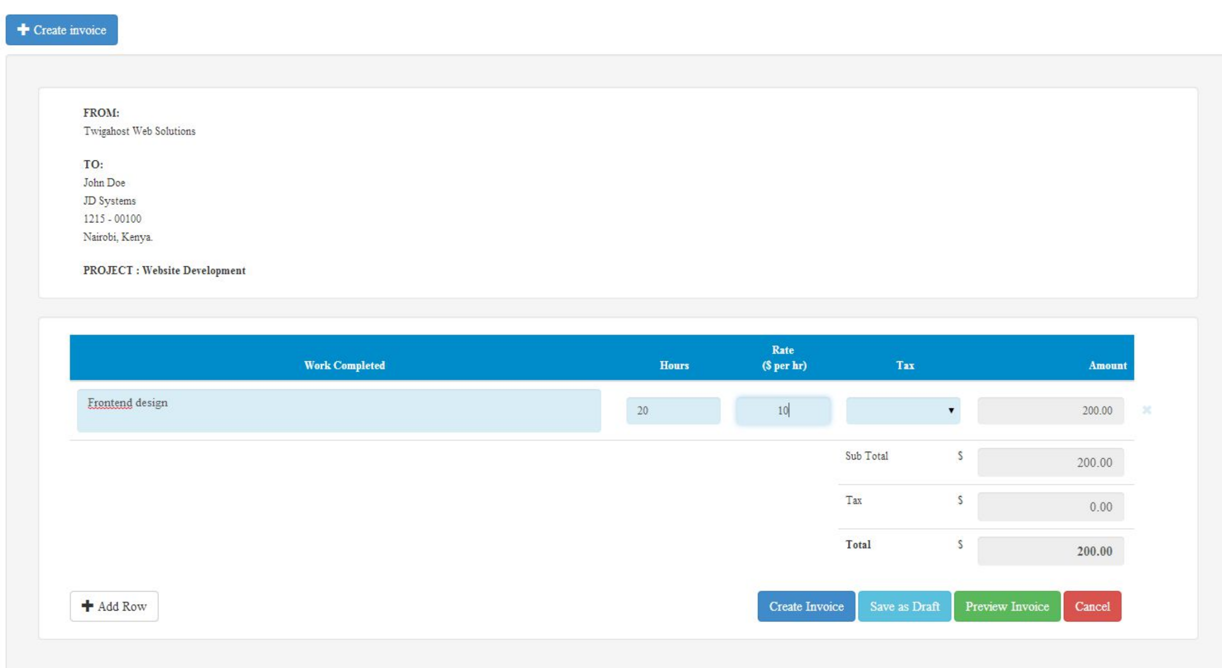
3. Billing

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

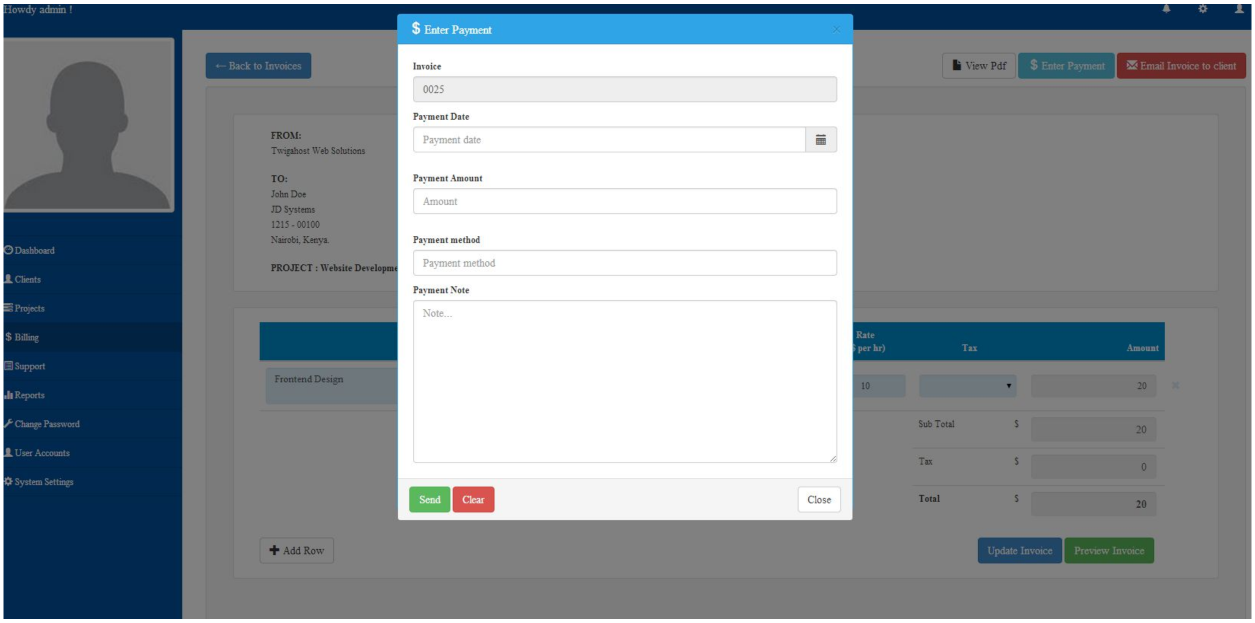


To create a new invoice click on the "new invoice" button on the right hand corner.

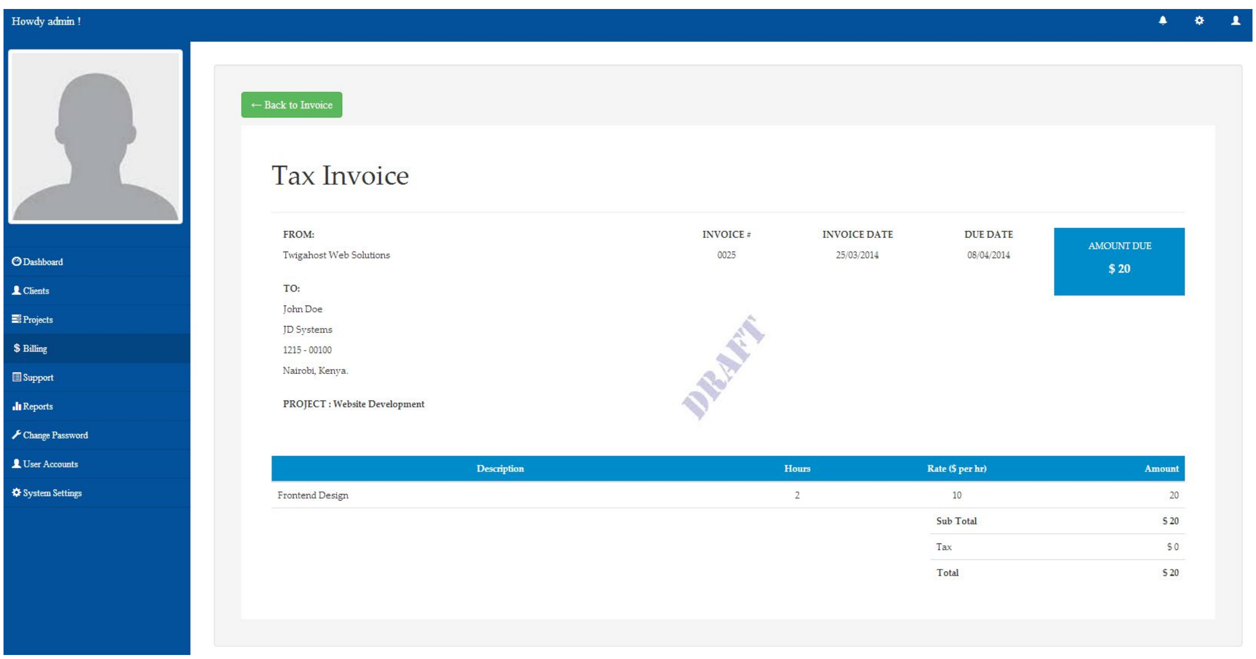
Clicking the create invoice button gives you the project select dropdown and then on selecting the project the new invoice form appears



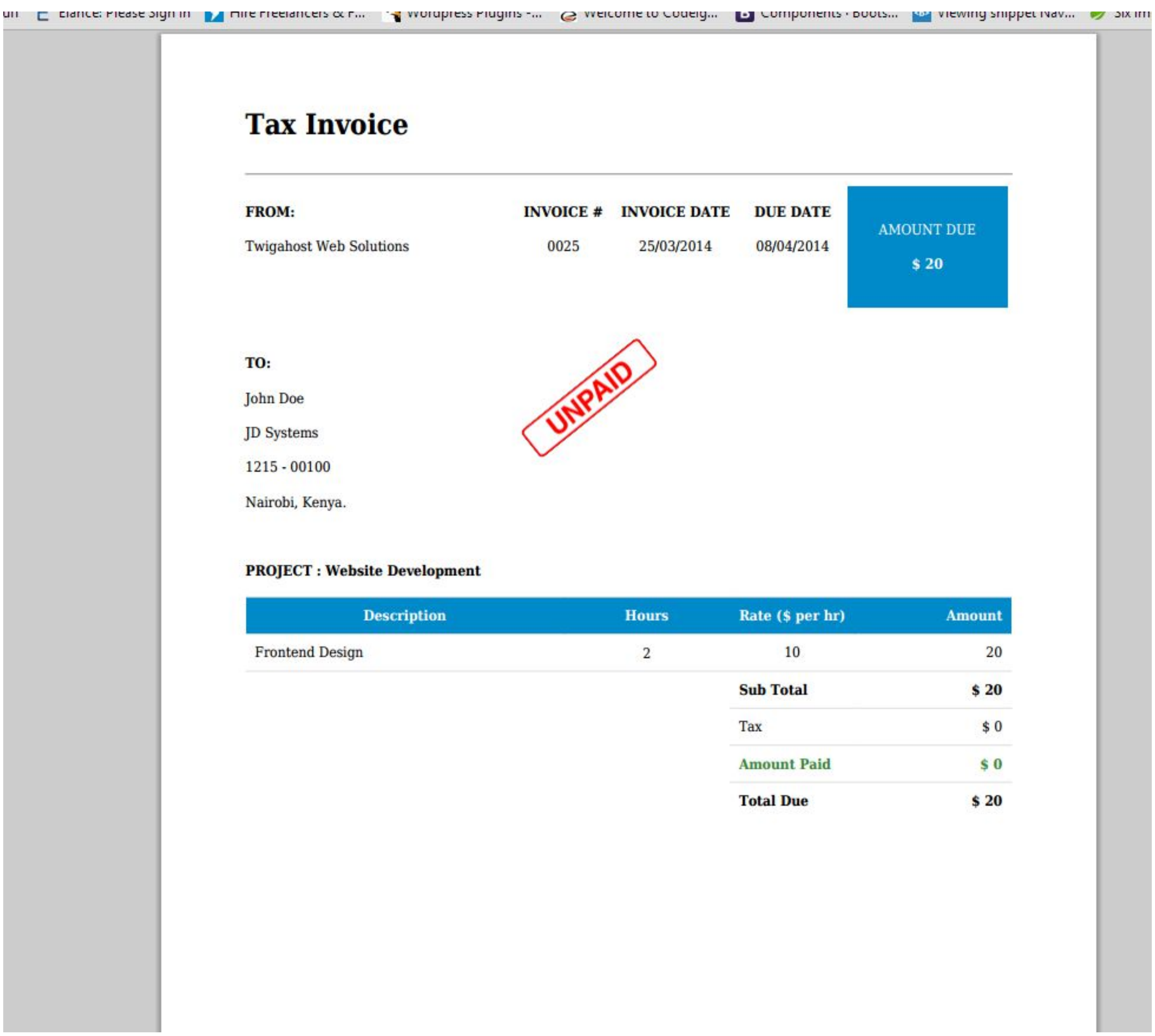
To enter payment for an invoice click on the "Enter payment" button and a popup the be displayed like the one below



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



Tax Invoice

FROM:
Twigahost Web Solutions

INVOICE #	INVOICE DATE	DUE DATE	AMOUNT DUE
0025	25/03/2014	08/04/2014	$ 20

TO:
John Doe
JD Systems
1215 - 00100
Nairobi, Kenya.

UNPAID

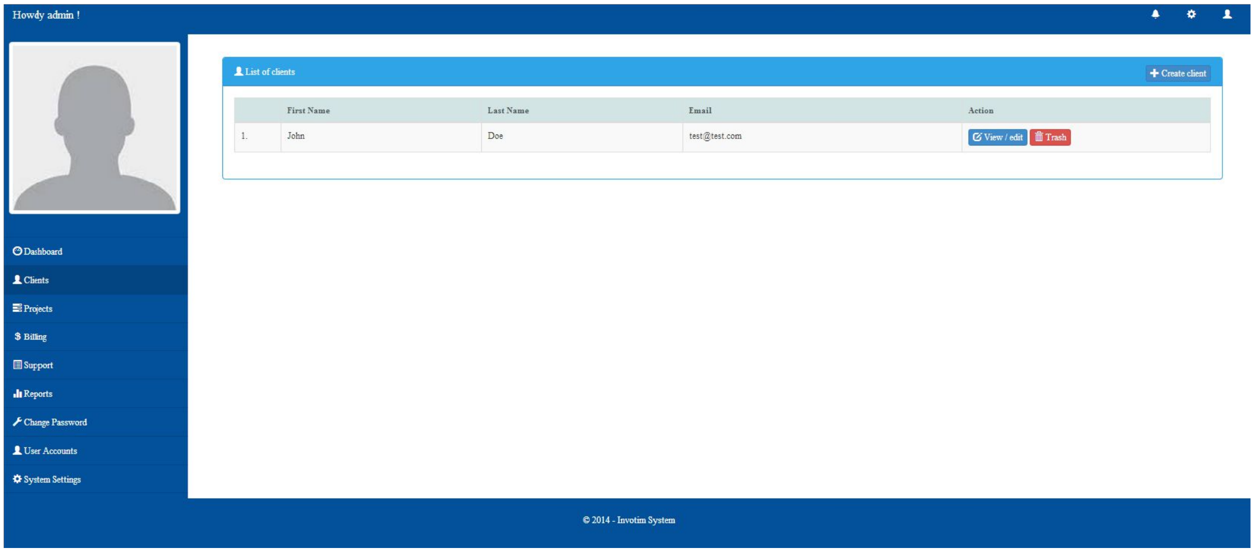
PROJECT : Website Development

Description	Hours	Rate ($ per hr)	Amount
Frontend Design	2	10	20

Sub Total	**$ 20**
Tax	$ 0
Amount Paid	**$ 0**
Total Due	**$ 20**

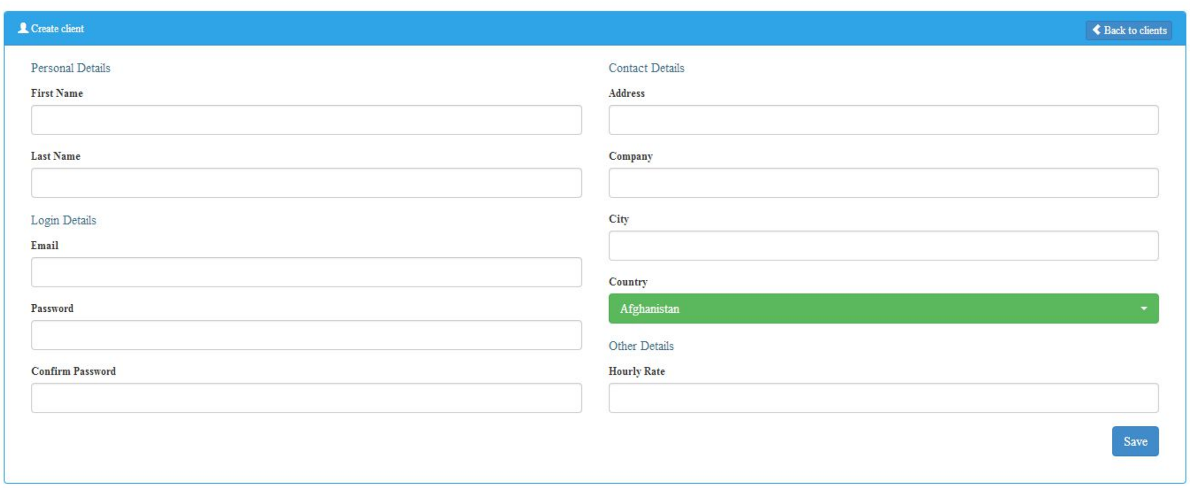
4. Clients

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.

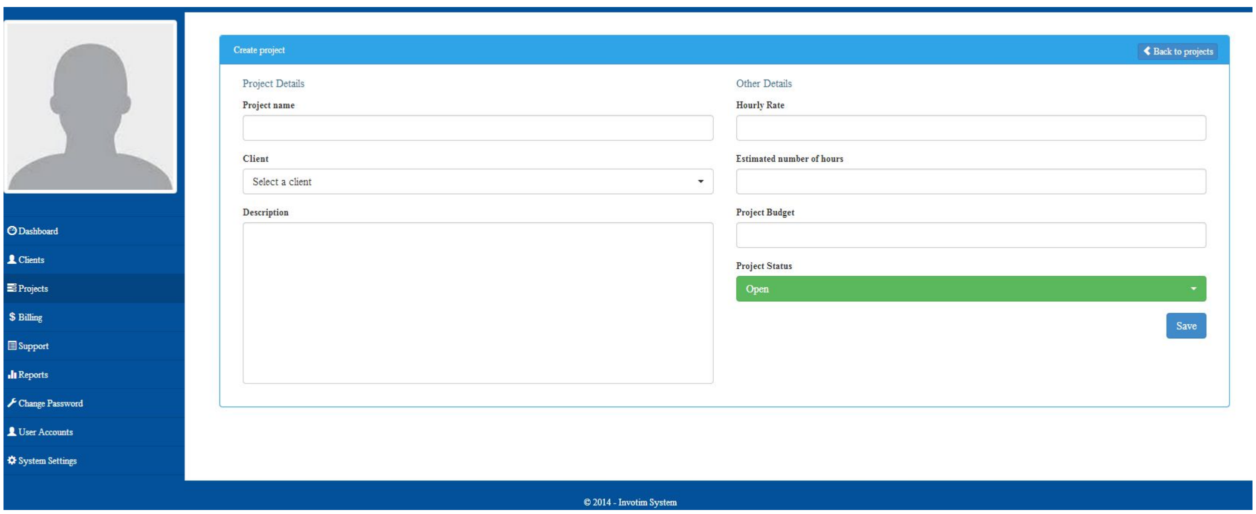
The following form will appear for creating a new client.



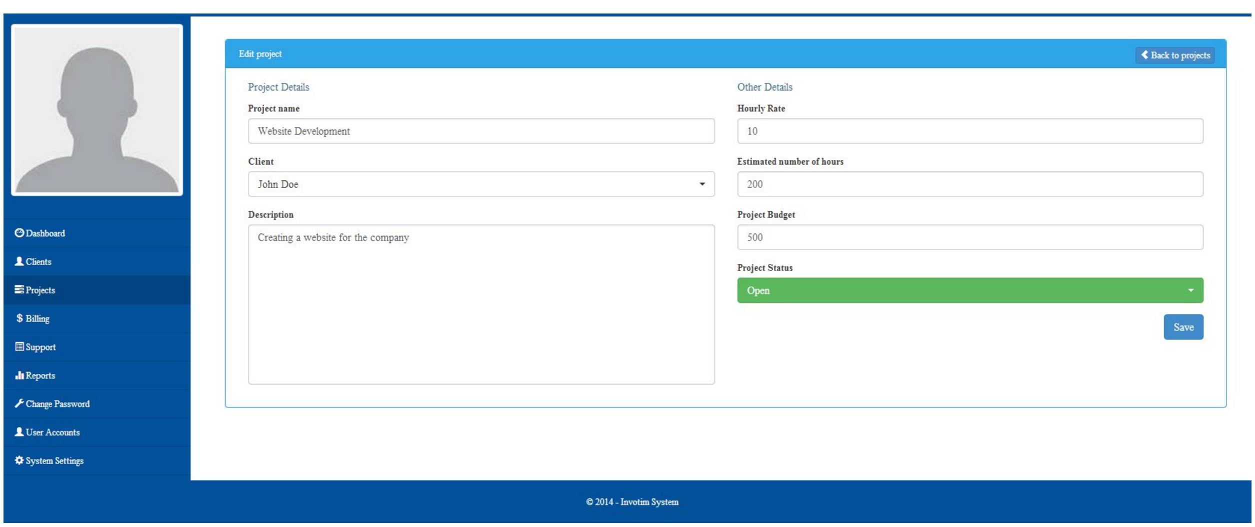
5. Projects

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

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

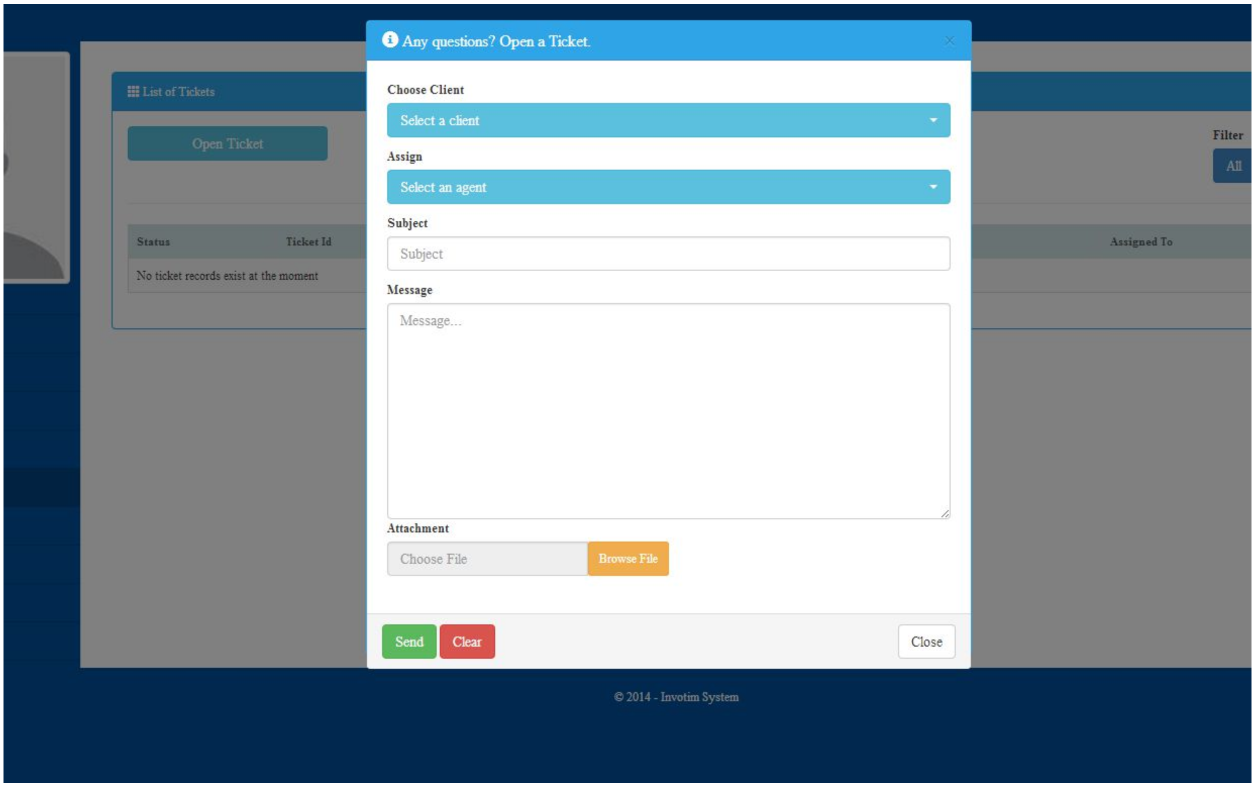


To edit a project click on the edit link and a form will appear with the project details that you can edit and then save.

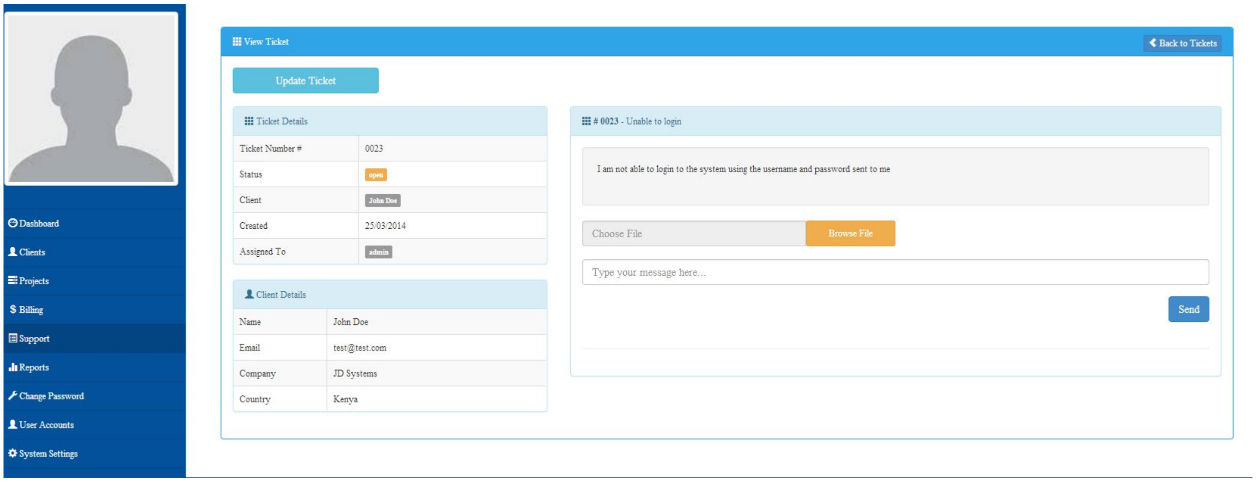


6. Support Tickets

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.



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



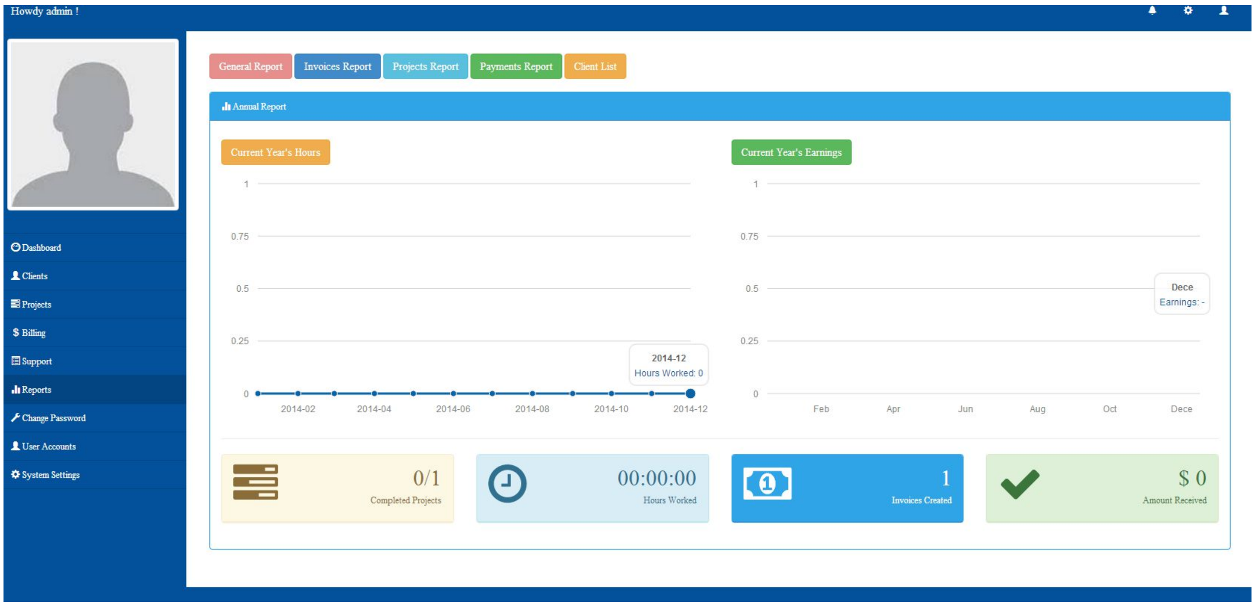
7. Reports

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

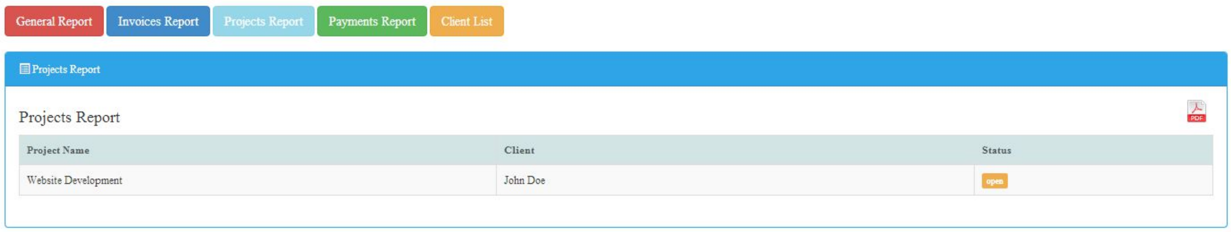


b. Invoices Report

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 

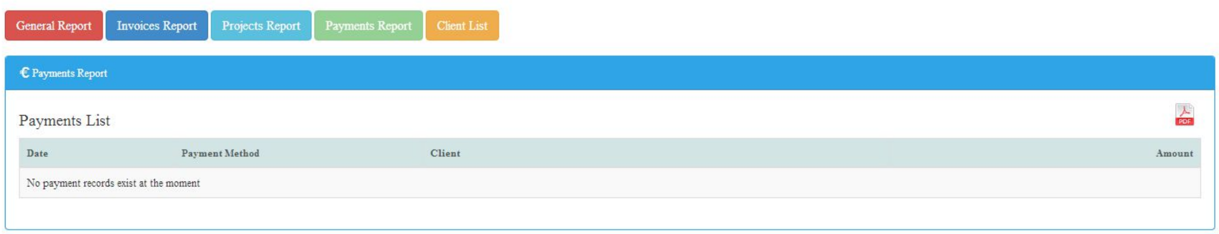
c. Projects Report

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



d. Payments Report

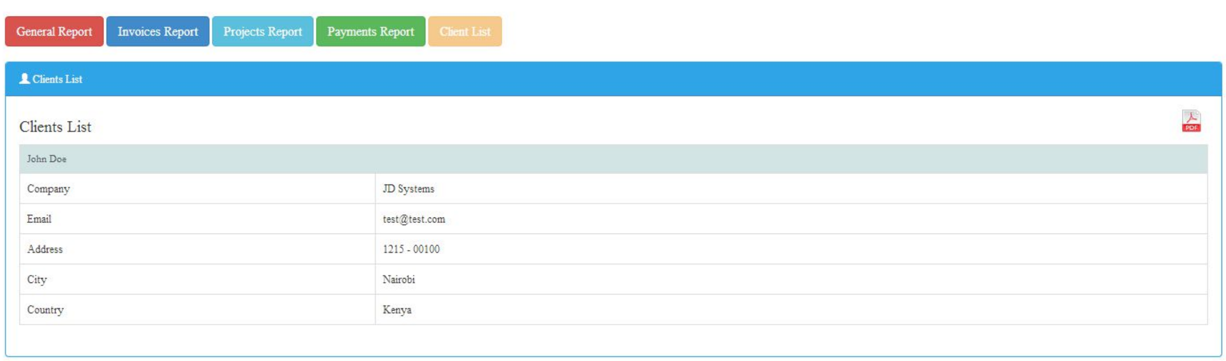
The payments report displays a list of all the payments that have been made from which client. The report can be exported to pdf by clicking



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

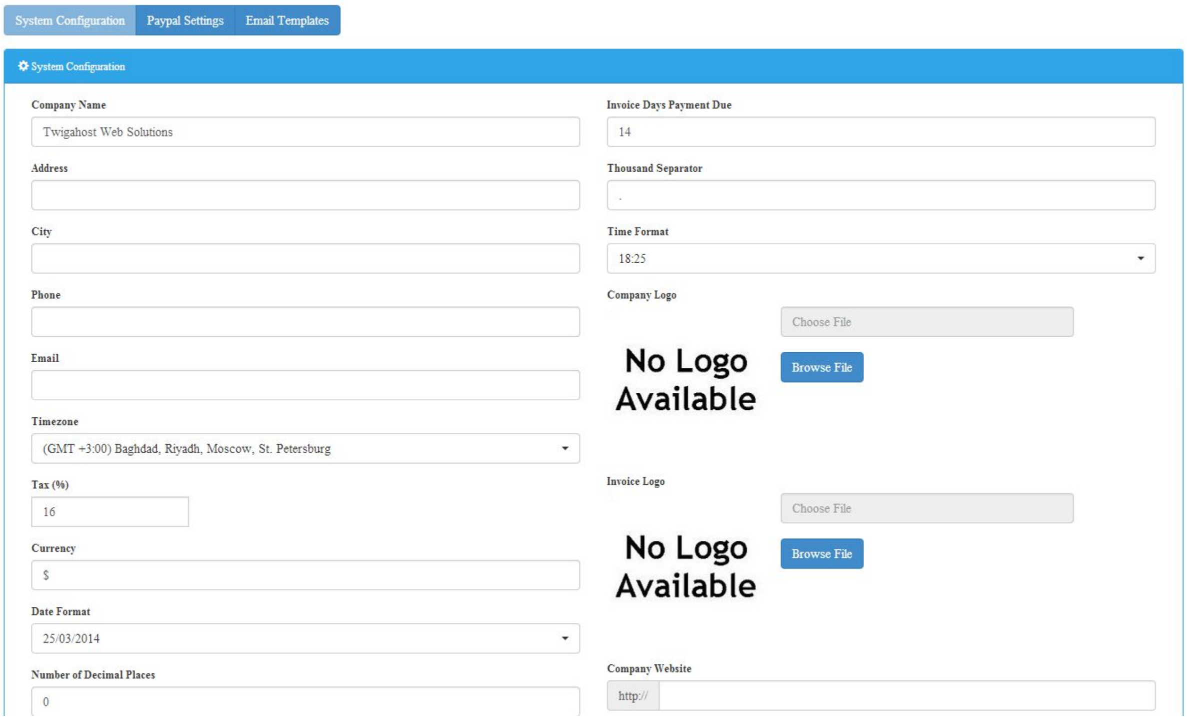


8. System settings

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

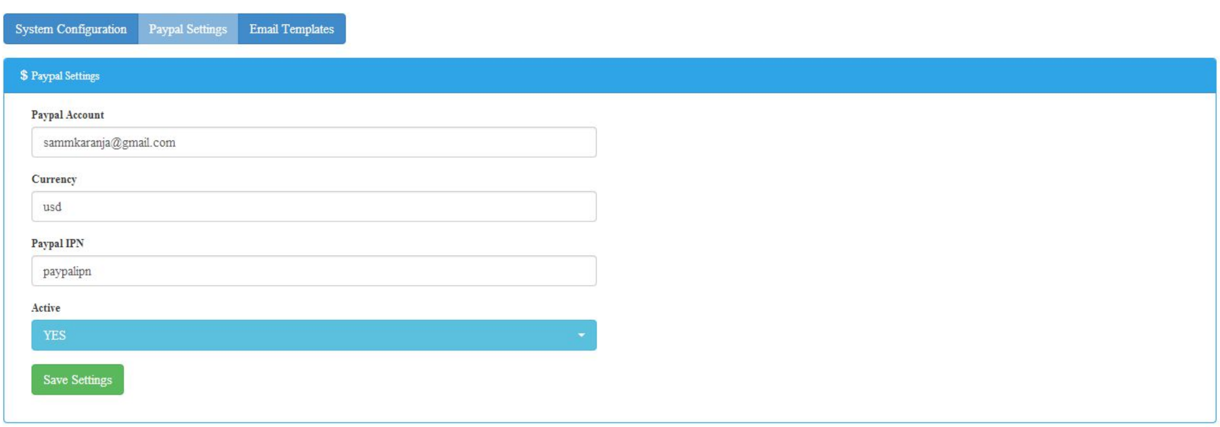
a. System configuration

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



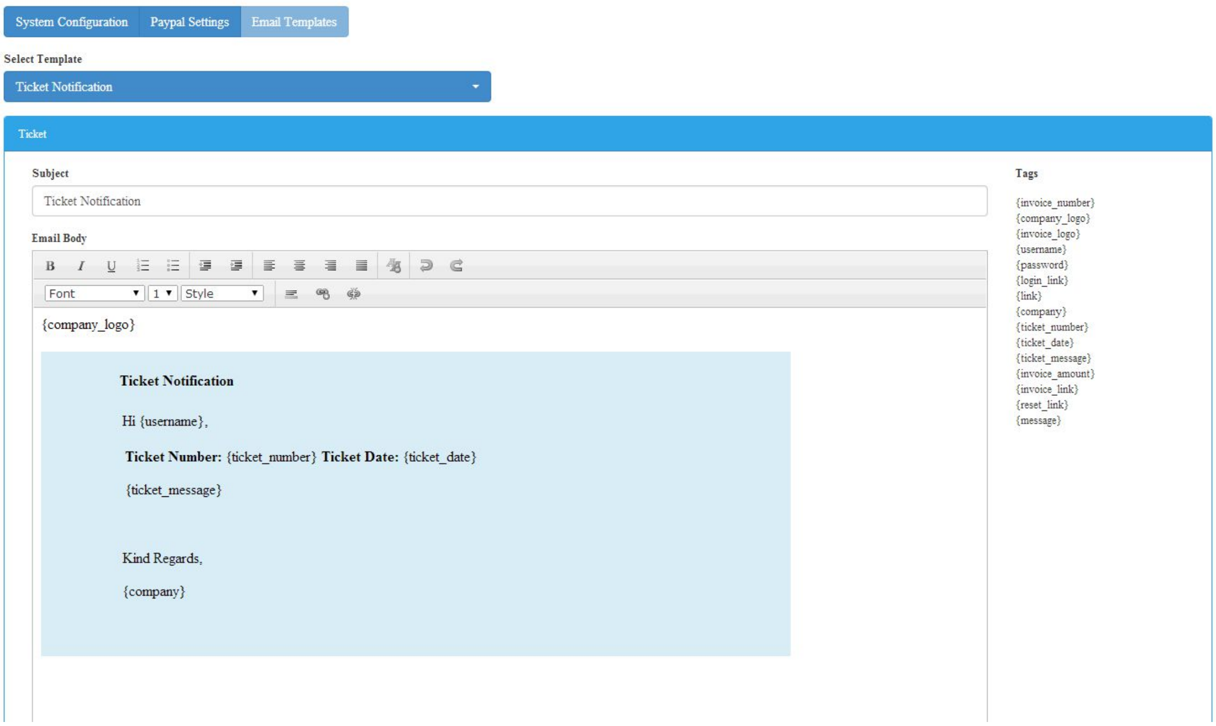
b. Paypal Settings

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



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