



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.

Table of Contents

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

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:

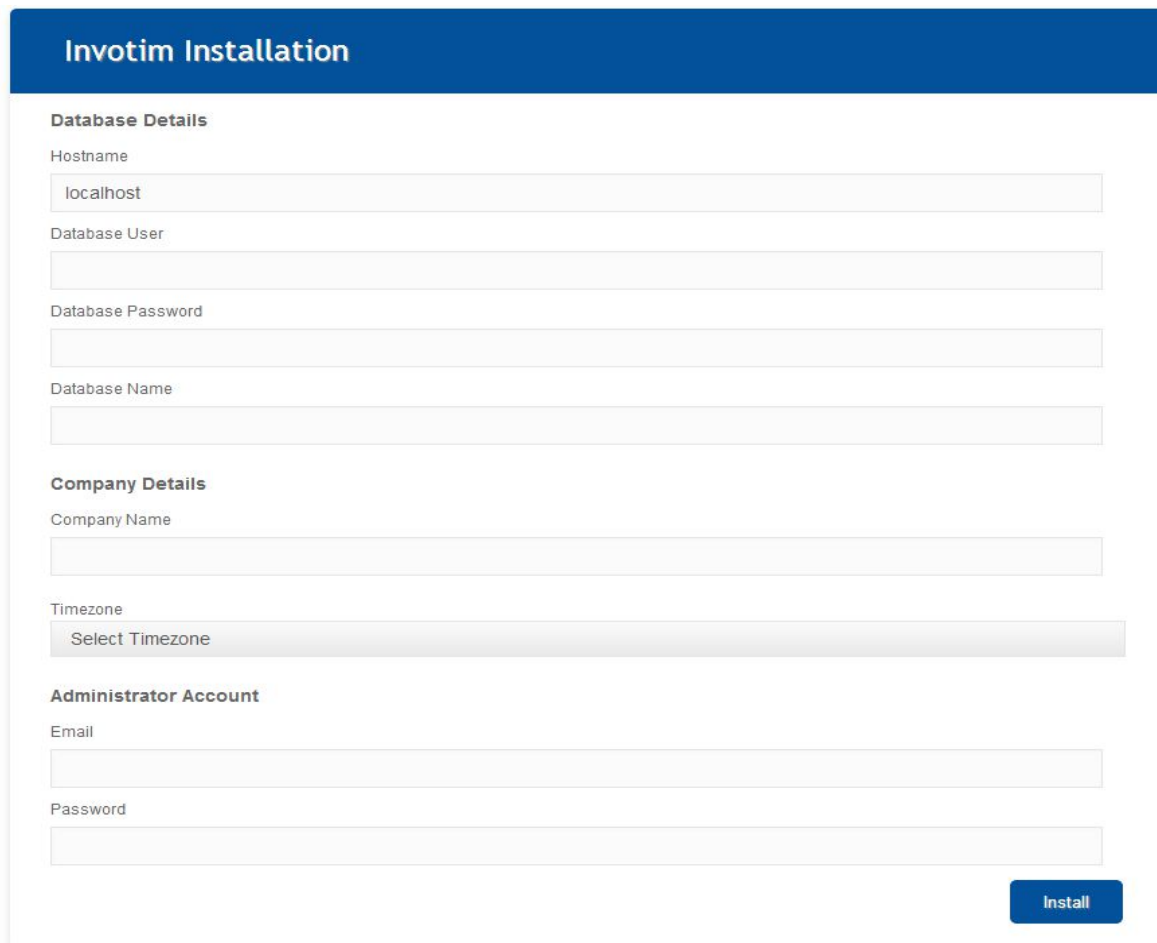
- application (directory)
- system (directory)
- assets (directory)
- database.sql (dump file)
- resources (directory)
- install (directory)
- documentation.pdf
- index.php

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 displays the 'Invotim Installation' web form. It features a blue header with the title 'Invotim Installation'. The form is organized into three main sections: 'Database Details', 'Company Details', and 'Administrator Account'. Each section contains several input fields for user configuration. A blue 'Install' button is positioned at the bottom right of the form.

Database Details	
Hostname	<input type="text" value="localhost"/>
Database User	<input type="text"/>
Database Password	<input type="password"/>
Database Name	<input type="text"/>

Company Details	
Company Name	<input type="text"/>
Timezone	<input type="text" value="Select Timezone"/>

Administrator Account	
Email	<input type="text"/>
Password	<input type="password"/>

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

Invoitim Installation

Database Details

Hostname

localhost

Database User

dbuser

Database Password

Database Name

invoitim

Company Details

Company Name

mycompany

Timezone

(GMT -10:00) Hawaii

Administrator Account

Email

test@mycompany.com

Password


Install

Click on install button to start the installation process.

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

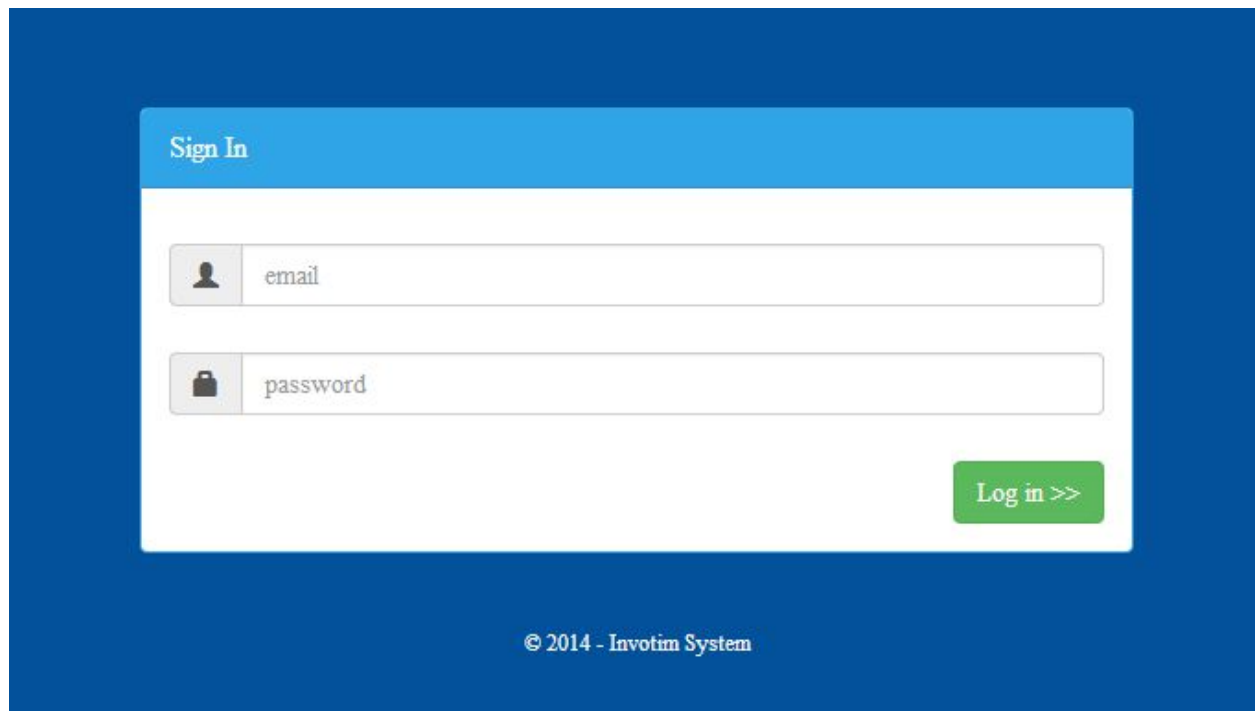
Post – Installation steps

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.



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.

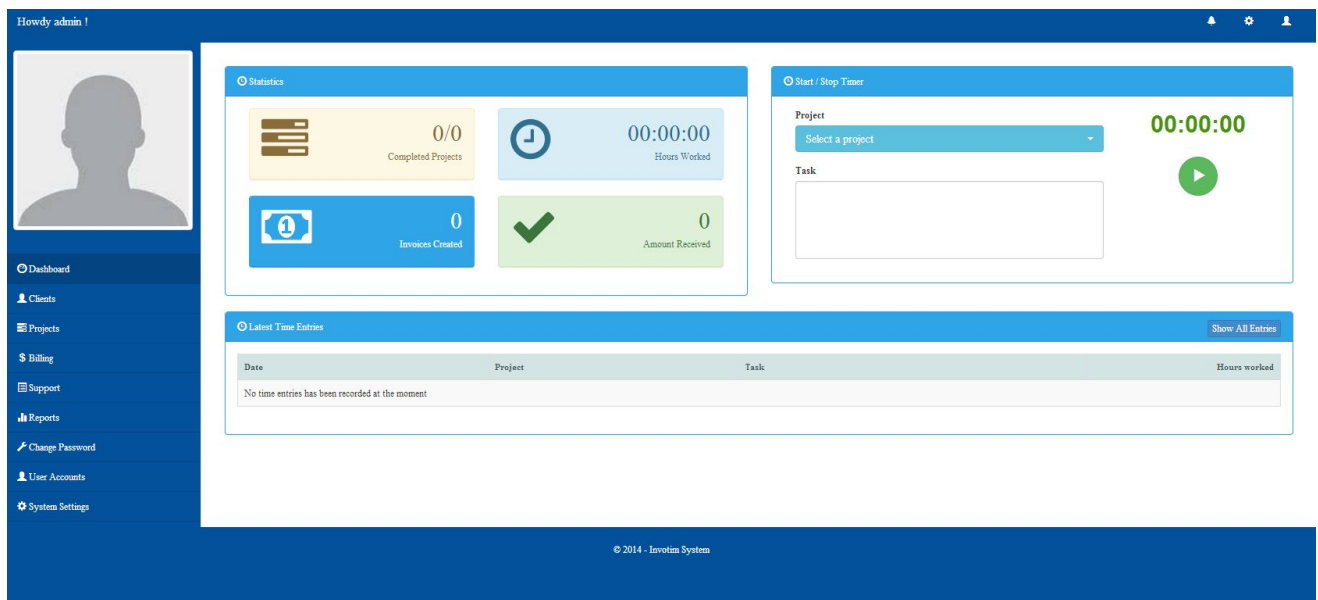
System Guide

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



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.


Project

Website Development

Task

Design the frontend

00:00:00



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

Start / Stop Timer


Project

Website Development

Task

Design the frontend


00:00:53



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

Project : Website Development

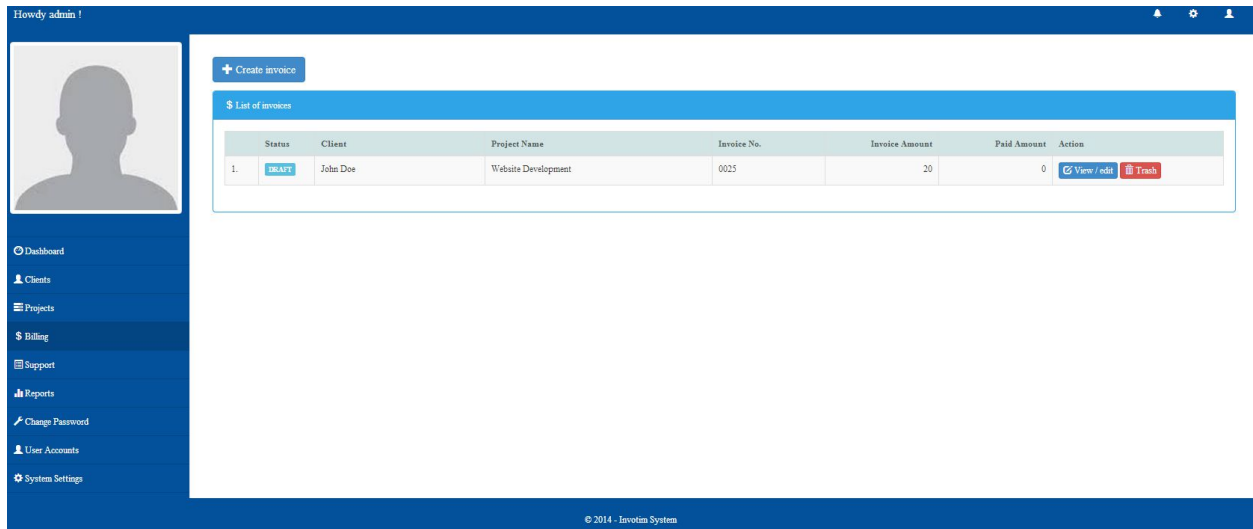
00:01:59



+ Create project

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. It includes a 'FROM' section (Twigahost Web Solutions), a 'TO' section (John Doe, JD Systems, 1215 - 00100, Nairobi, Kenya), and a 'PROJECT' field (Website Development). Below is a table for 'Work Completed' with columns for Work Completed, Hours, Rate (\$ per hr), Tax, and Amount. One row is filled with 'Frontend design', 20 hours, and a rate of 10, resulting in an amount of 200.00. Summary rows for Sub Total, Tax, and Total are shown at the bottom right. At the bottom left is an 'Add Row' button, and at the bottom right are buttons for 'Create Invoice', 'Save as Draft', 'Preview Invoice', and 'Cancel'.

Work Completed	Hours	Rate (\$ per hr)	Tax	Amount
Frontend design	20	10		200.00
Sub Total				\$ 200.00
Tax				\$ 0.00
Total				\$ 200.00

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

Howdy admin !

← Back to Invoices

FROM: Twigahost Web Solutions

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

PROJECT : Website Development

Freelance Design

+ Add Row

View Pdf Enter Payment Email Invoice to client

\$ Enter Payment

Invoice: 0025

Payment Date:

Payment Amount:

Payment method:

Payment Note:

Send Clear Close

Rate (per hr)	Tax	Amount
10		20
Sub Total		\$ 20
Tax		\$ 0
Total		\$ 20

Update Invoice Preview Invoice

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

Howdy admin !

← Back to Invoice

Tax Invoice

FROM: Twigahost Web Solutions

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

PROJECT : Website Development

INVOICE #: 0025

INVOICE DATE: 25/03/2014

DUE DATE: 08/04/2014

AMOUNT DUE: \$ 20

DRAFT

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

Tax Invoice

FROM:

Twighost Web Solutions

INVOICE #

0025

INVOICE DATE

25/03/2014

DUE DATE

08/04/2014

AMOUNT DUE

\$ 20

TO:

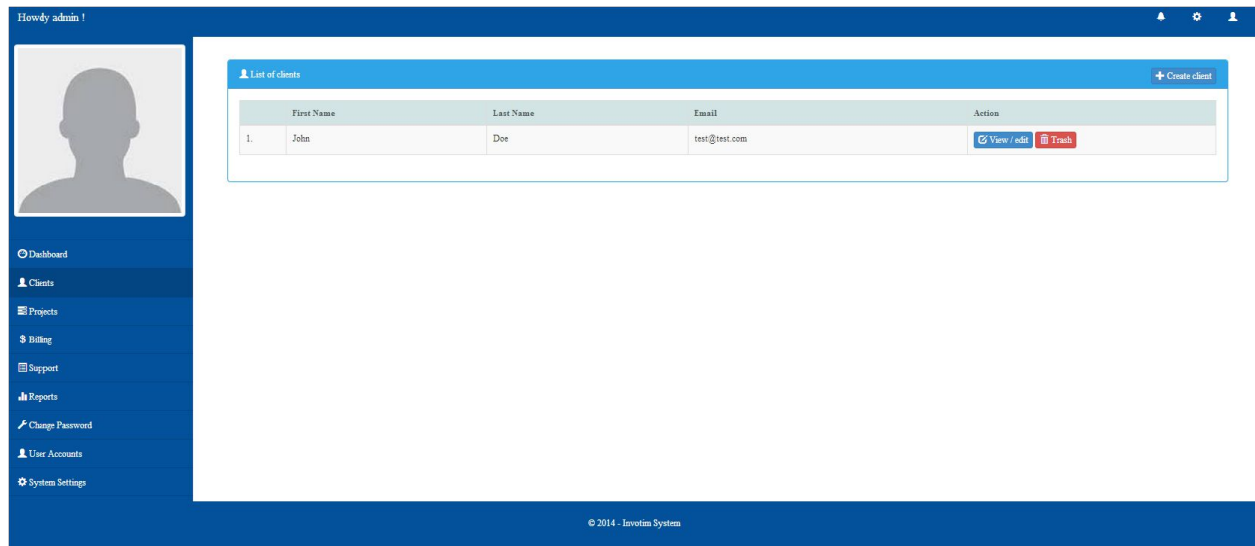
John Doe
JD Systems
1215 - 00100
Nairobi, Kenya.

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

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.

A form titled 'Create client' with a 'Back to clients' link in the top right. The form is divided into two columns. The left column contains sections for 'Personal Details' (First Name, Last Name), 'Login Details' (Email, Password, Confirm Password), and 'Contact Details' (Address, Company, City, Country). The right column contains 'Other Details' (Hourly Rate). The 'Country' dropdown menu is currently set to 'Afghanistan'. A 'Save' button is located at the bottom right of the form.

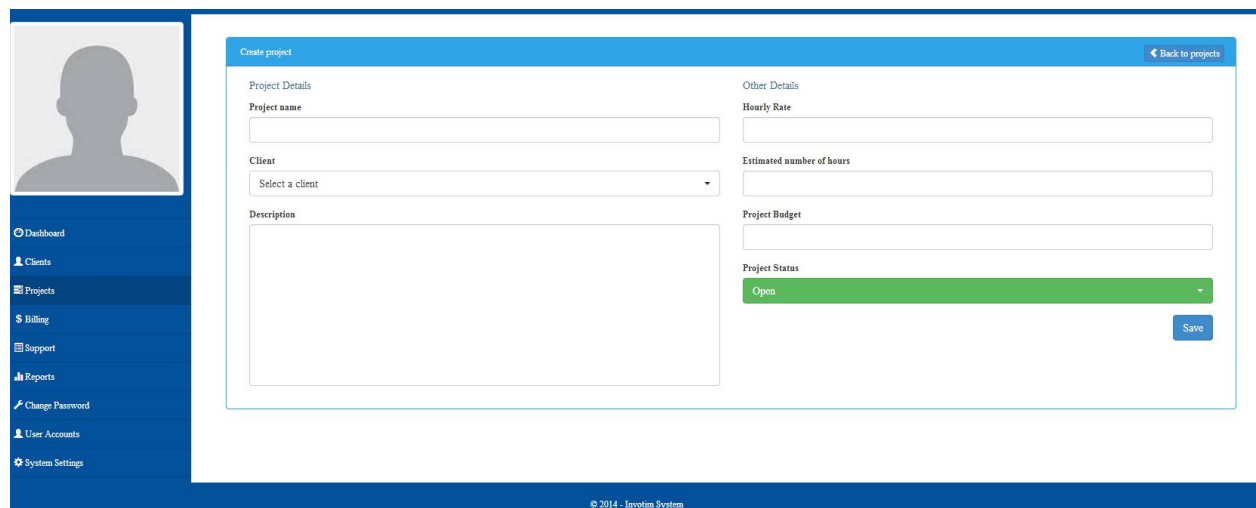
5. Projects

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.



Create project [Back to projects](#)

Project Details

Project name:

Client:

Description:

Other Details

Hourly Rate:

Estimated number of hours:

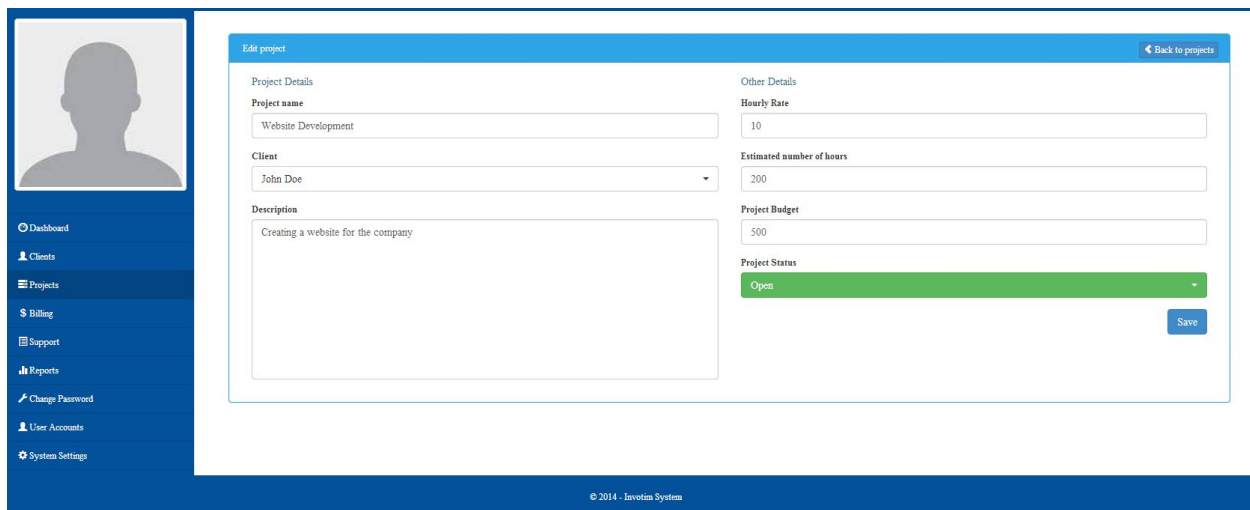
Project Budget:

Project Status:

[Save](#)

© 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.



Edit project [Back to projects](#)

Project Details

Project name:

Client:

Description:

Other Details

Hourly Rate:

Estimated number of hours:

Project Budget:

Project Status:

[Save](#)

© 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. 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 "Subject".
- Message:** A large text area with the placeholder "Message...".
- Attachment:** Two buttons: "Choose File" and "Browse File".
- Buttons:** "Send" (green), "Clear" (red), and "Close" (grey).

The background shows a blurred view of the "List of Tickets" table with columns "Status" and "Ticket Id". A message states "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 with a user profile and a menu: 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.

Update Ticket

Ticket Details

Ticket Number #	0023
Status	Open
Client	John Doe
Created	25/03/2014
Assigned To	Admin

Client Details

Name	John Doe
Email	test@test.com
Company	JD Systems
Country	Kenya

0023 - Unable to login

I am not able to login to the system using the username and password sent to me

Choose File Browse File

Type your message here...

Send

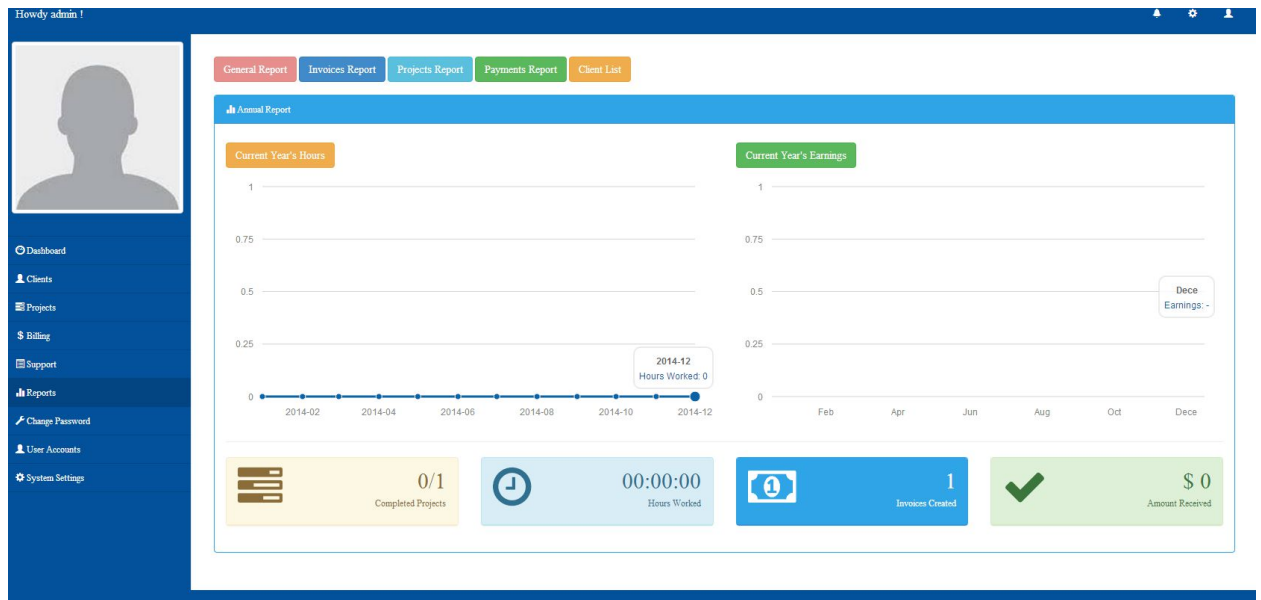
7. Reports

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 shows the 'Invoices Report' table. At the top, there are five tabs: 'General Report', 'Invoices Report' (selected), 'Projects Report', 'Payments Report', and 'Client List'. Below the tabs, the table is titled 'Invoices List'. The table has six columns: 'Status', 'Client', 'Project Name', 'Invoice No.', 'Invoice Amount', and 'Paid Amount'. There is a 'PDF' icon in the top right corner of the table. The table contains one row of data.

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


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 


General Report	Invoices Report	Projects Report	Payments Report	Client List
----------------	-----------------	-----------------	-----------------	-------------

Projects Report			
Projects Report			
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 

General Report	Invoices Report	Projects Report	Payments Report	Client List
----------------	-----------------	-----------------	-----------------	-------------


€ Payments Report				
Payments List				
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 

General Report	Invoices Report	Projects Report	Payments Report	Client List
----------------	-----------------	-----------------	-----------------	-------------

Clients List		
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.

System ConfigurationPaypal SettingsEmail Templates

System Configuration

Company Name

Twighost Web Solutions

Address

City

Phone

Email

Timezone

(GMT +3:00) Baghdad, Riyadh, Moscow, St. Petersburg

Tax (%)

16

Currency

\$

Date Format

25/03/2014

Number of Decimal Places

0

Invoice Days Payment Due

14

Thousand Separator

.

Time Format

18:25

Company Logo

Choose File

No Logo Available

Browse File

Invoice Logo

Choose File

No Logo Available

Browse File

Company Website

http://

b. Paypal Settings

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

System ConfigurationPaypal SettingsEmail Templates

Paypal Settings

Paypal Account

sammkaranja@gmail.com

Currency

usd

Paypal IPN

paypalipn

Active

YES

Save Settings

c. Email Templates

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

System ConfigurationPaypal SettingsEmail Templates

Select TemplateTicket Notification

Ticket

Subject

Ticket Notification

Email Body

B I U [List Icon] [Link Icon] [Image Icon] [Table Icon] [Text Color Icon] [Background Color Icon] [Decrease Indent Icon] [Increase Indent Icon] [Undo Icon] [Redo Icon]

Font 1 Style [Align Icon] [Bullet List Icon] [Numbered List Icon]

{company_logo}

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)

Ticket Notification

Hi {username},

Ticket Number: {ticket_number} Ticket Date: {ticket_date}

{ticket_message}

Kind Regards,

{company}

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