Classic Invoicer

Classic Invoicer *documentation by* ***samkaranja***

Version 1.2

Created: 21/10/2014

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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

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:

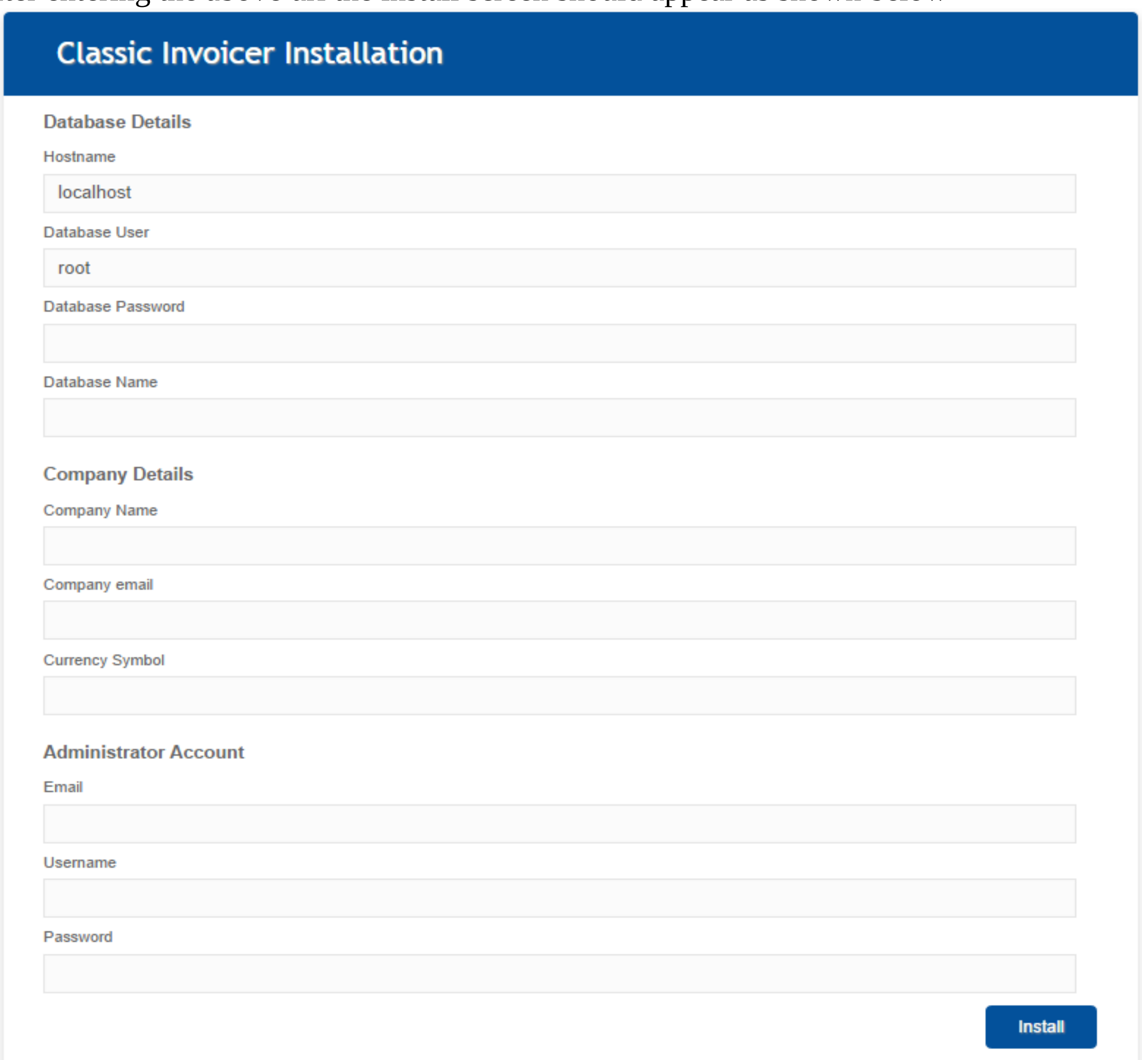
- application (directory)
- system (directory)
- assets (directory)
- install (directory)
- pdfinvoices (directory)
- .htaccess
- index.php

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

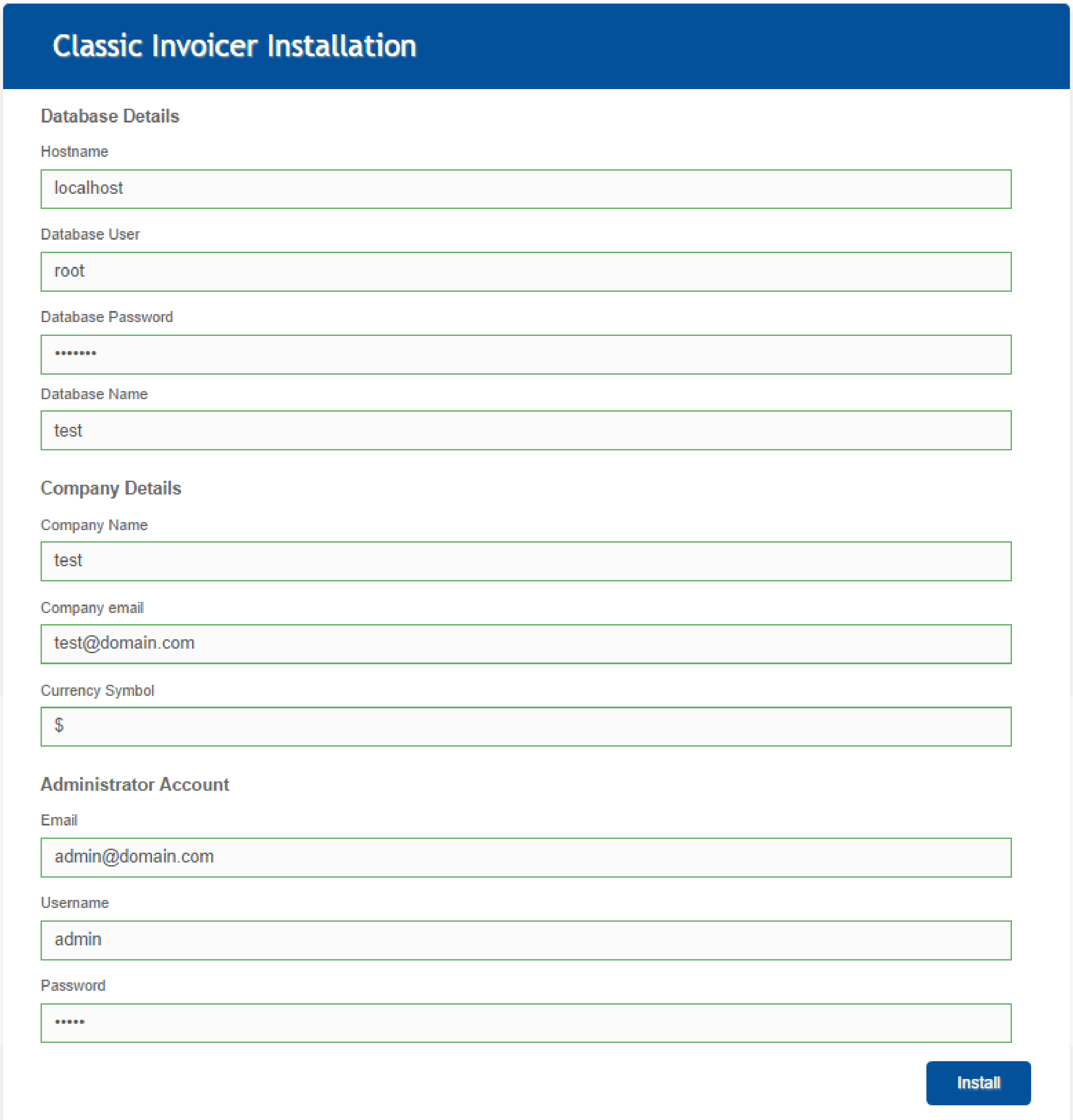
http://[yourdomain]/[youappfolder]/install

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 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

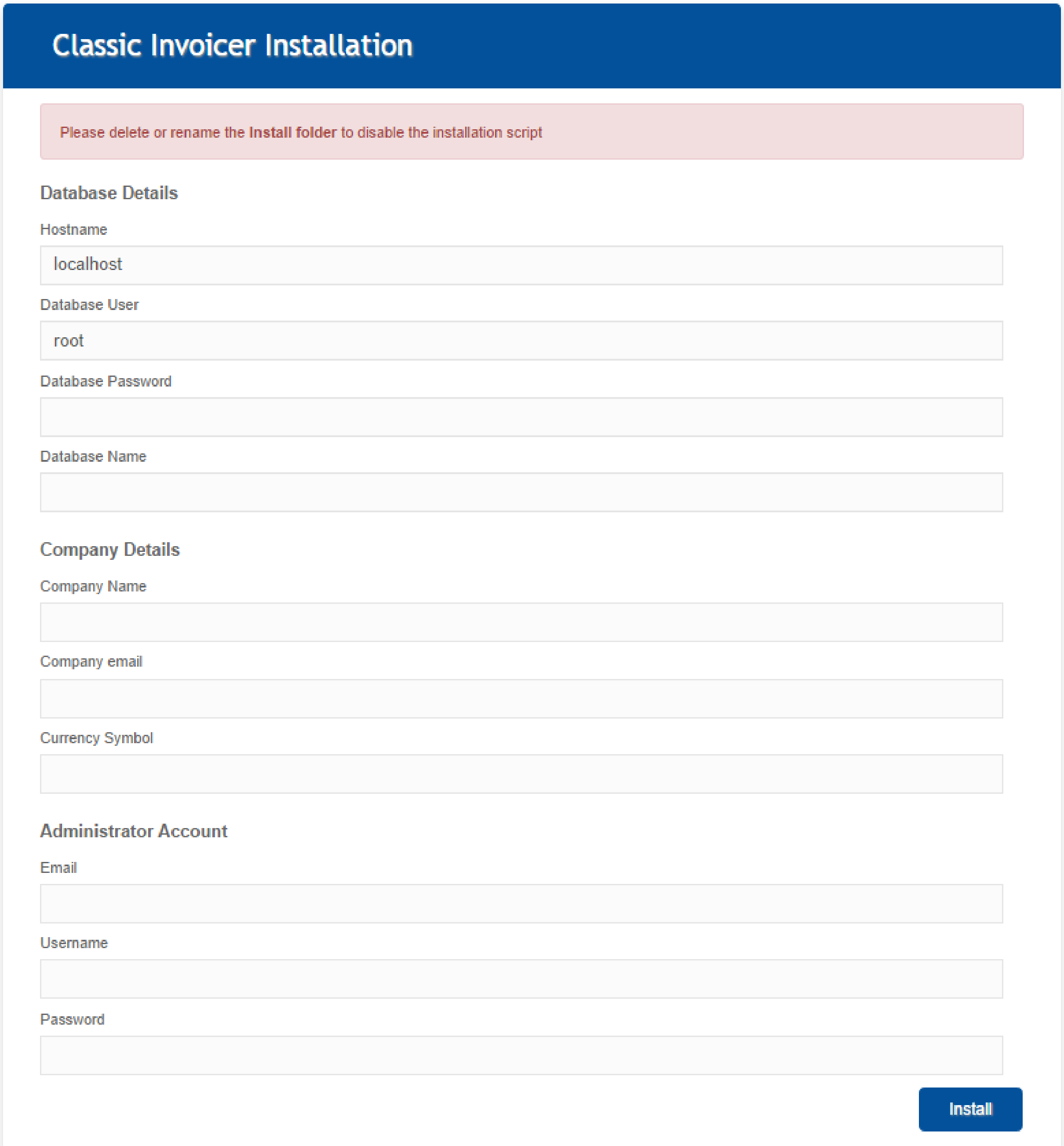


Click on install button to start the installation process.

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



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

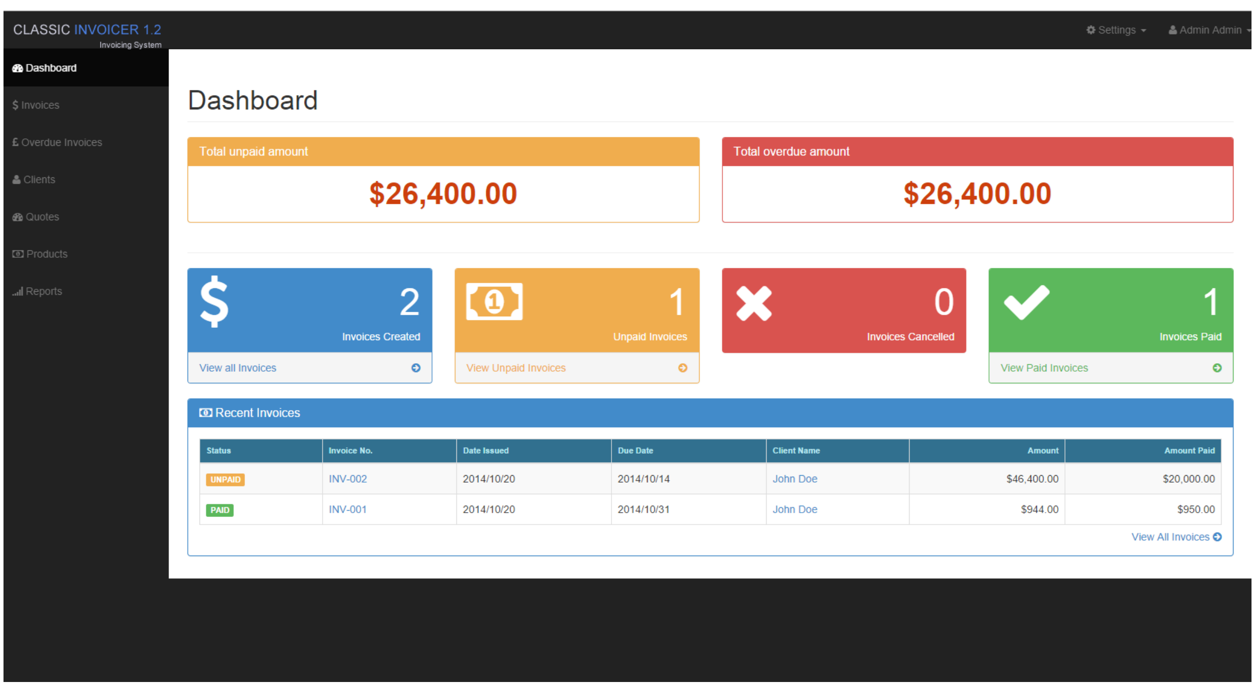
d. Generating reports

e. Generating new system users

f. Editing system settings

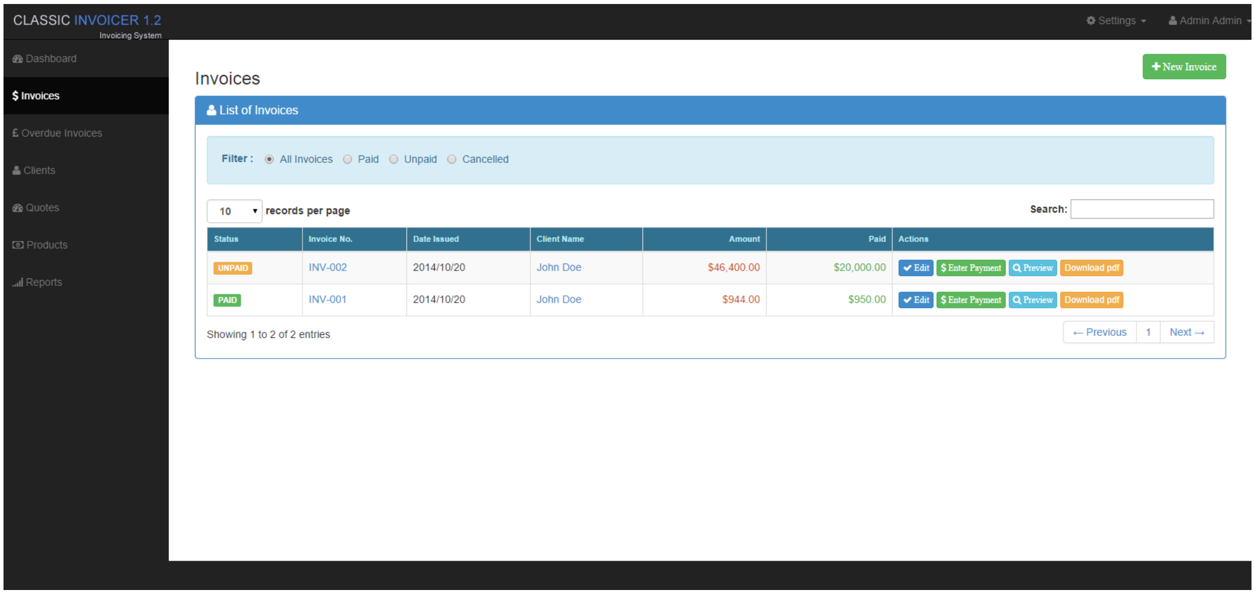
g. Managing tax rates

h. Managing payment methods



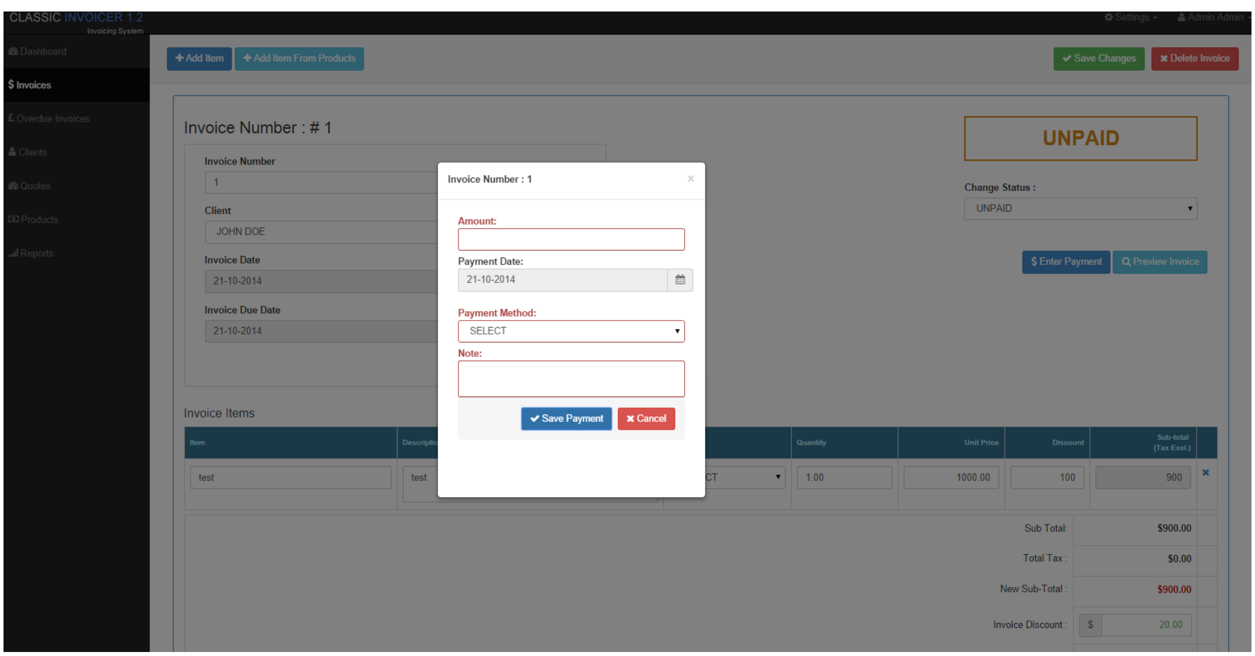
2. Invoices

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

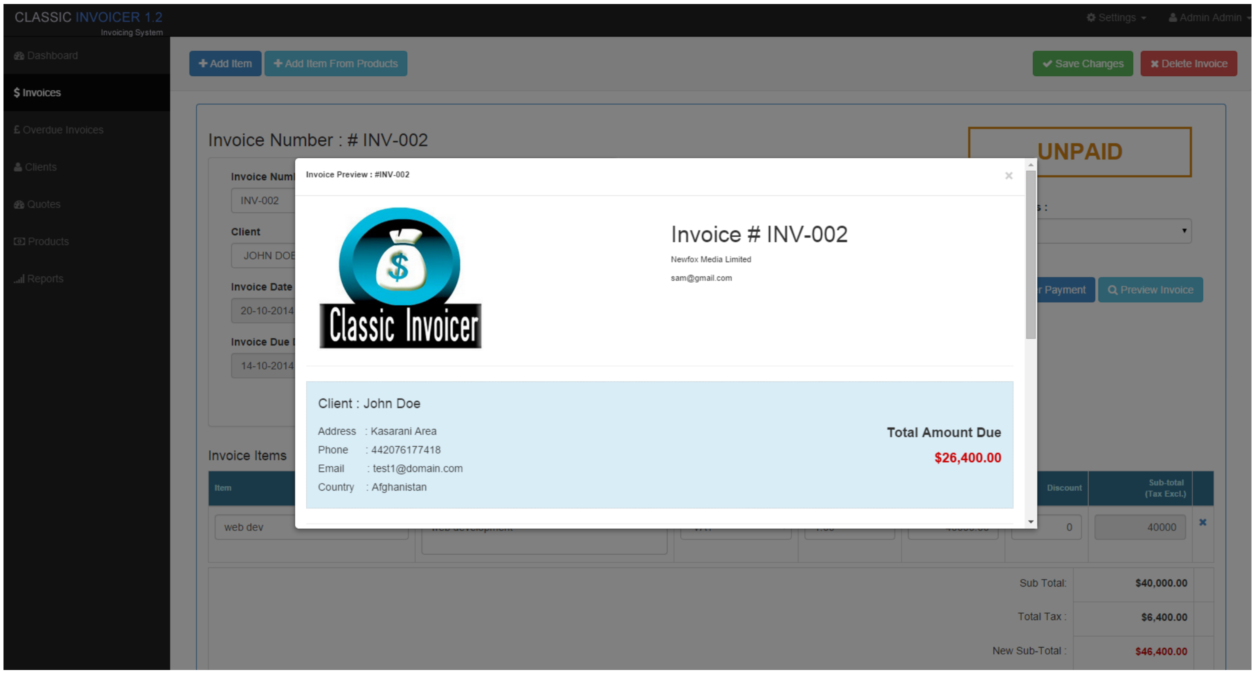


To create a new invoice click on the "new invoice" button on the right hand corner.

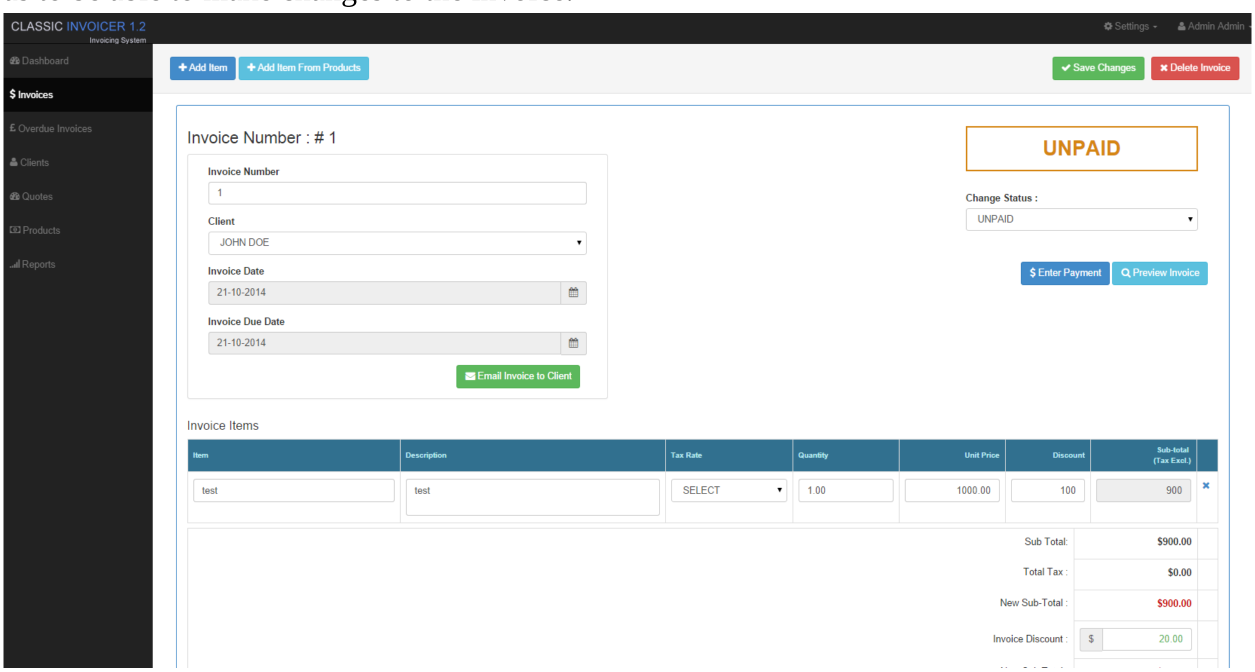
To enter payment for an invoice click on the "Enter payment" button and a popup the be displayed like the one below



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

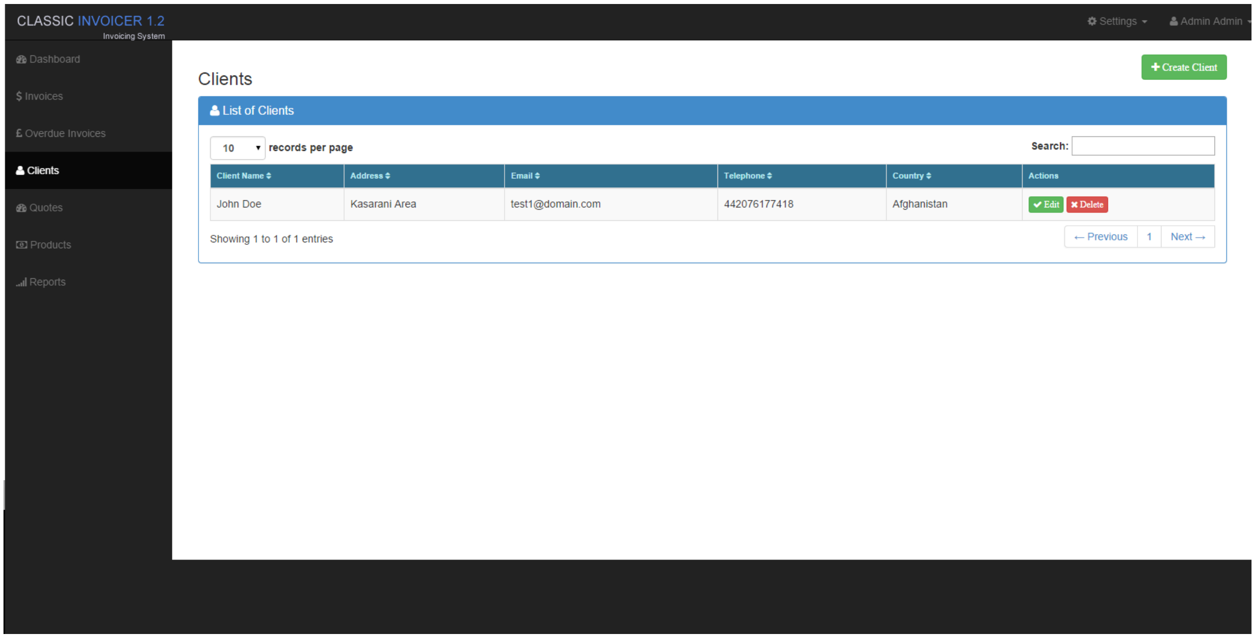


To edit an invoice details, click on the edit button so as to display the invoice in an edit mode so as to be able to make changes to the invoice.



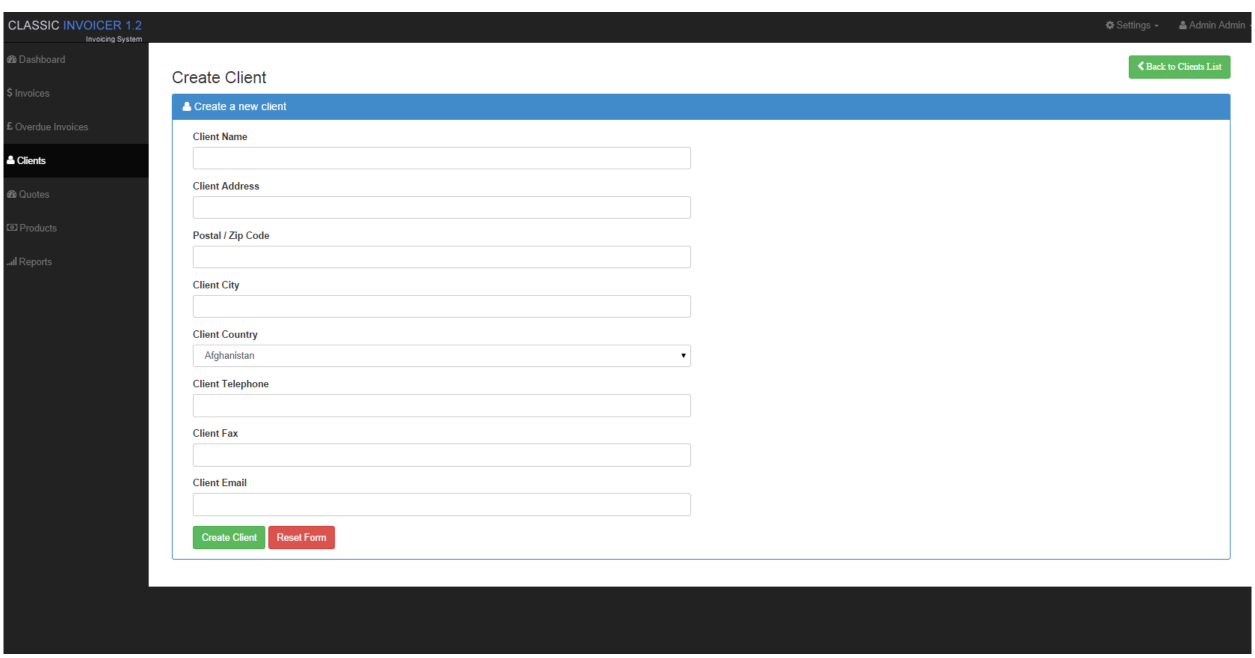
3. Clients

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



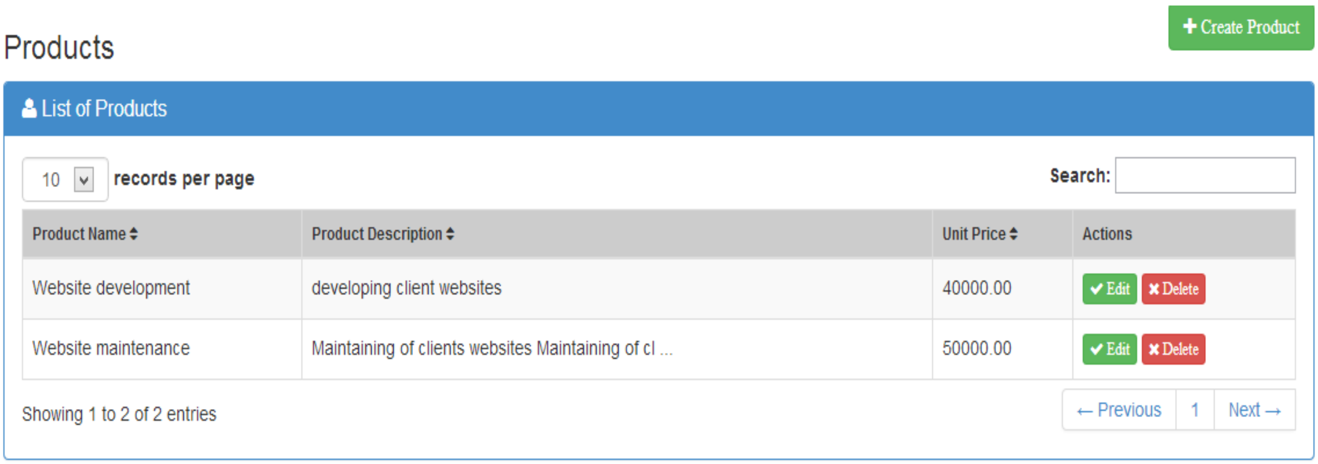
To add a client click on the create client link at the top right corner.

The following form will appear for creating a new client.

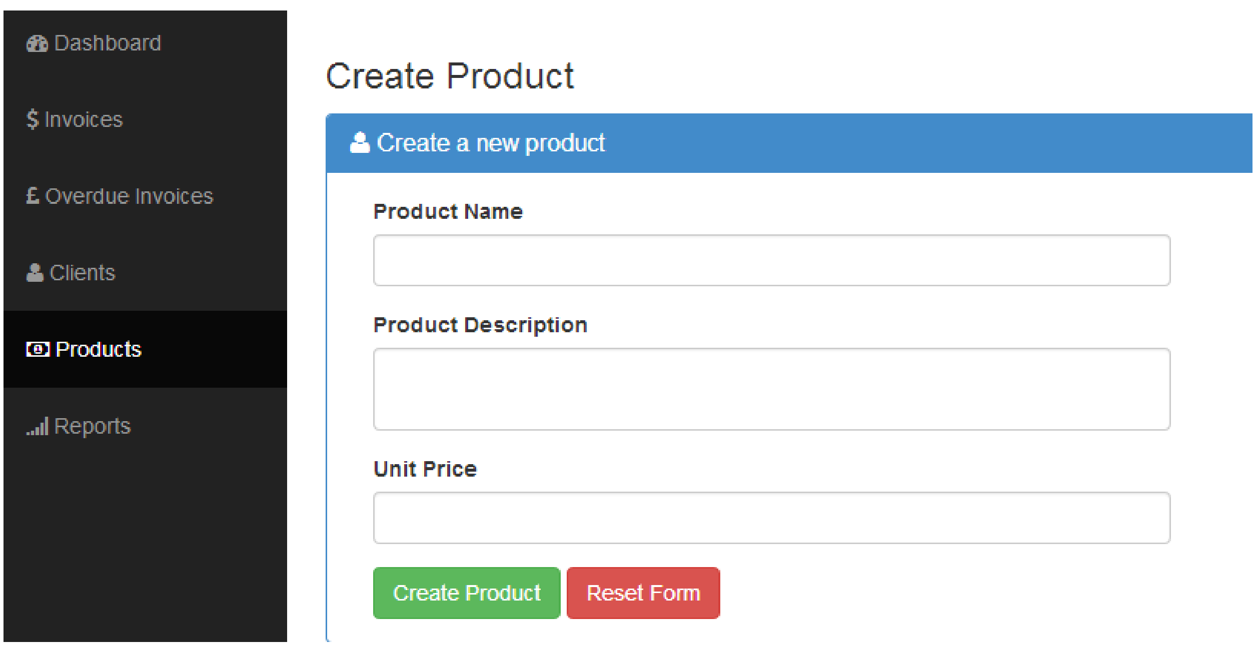


4. Products

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



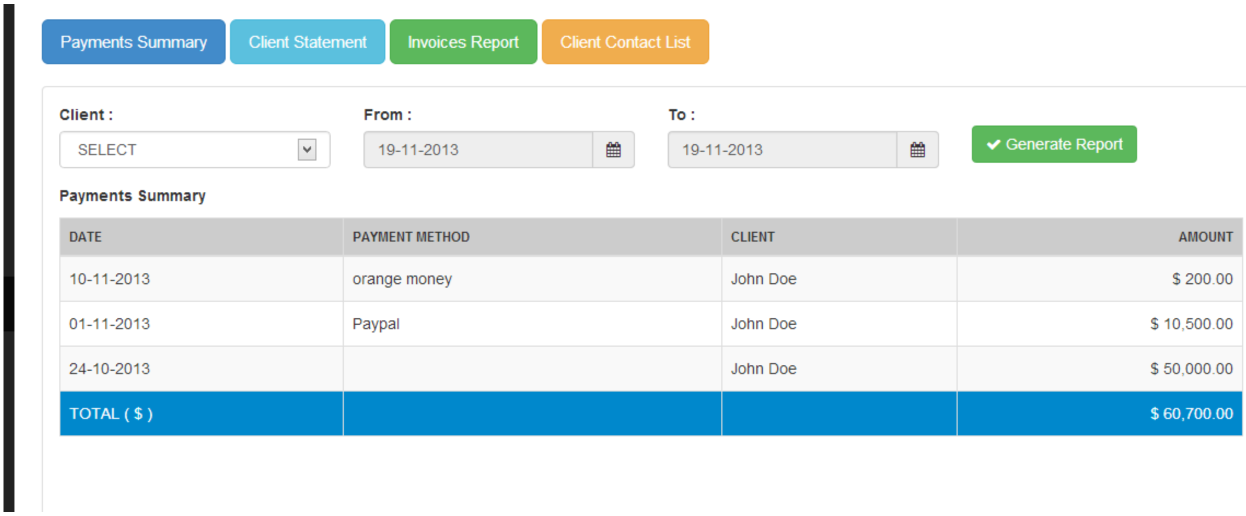
To create a new product click on the create product button on the top right corner. And the following page will appear.



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

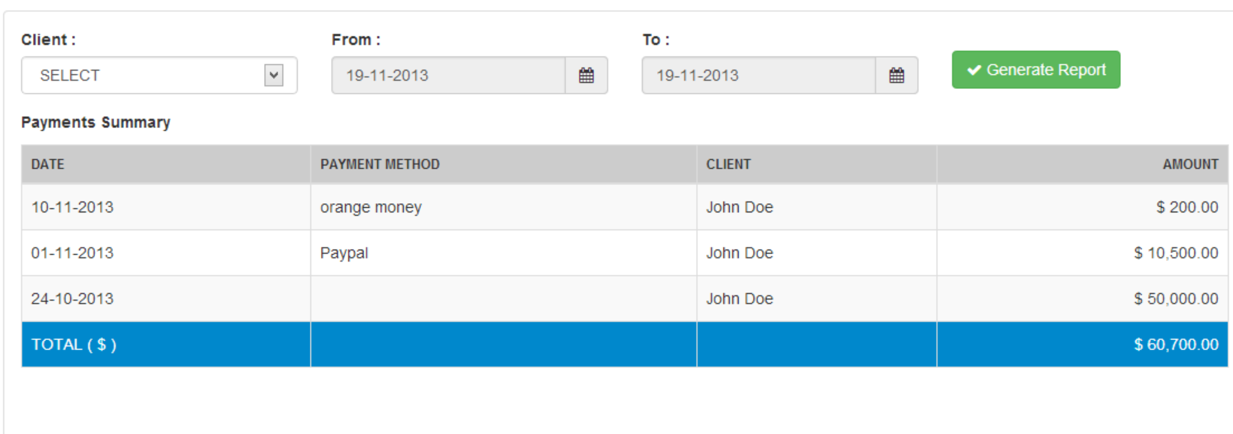
The reports menu is the menu that allows the user to view the various reports that the classic invoicer is capable of producing, when you click on reports, the following page should appear.



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

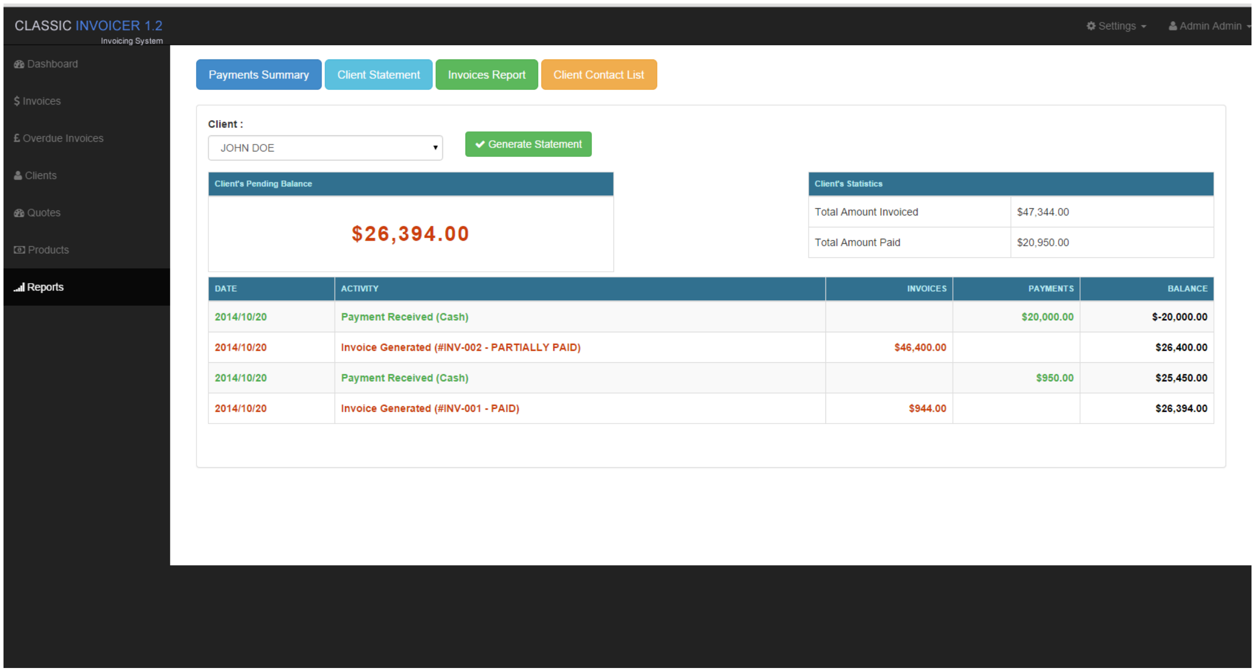


b. Client statement

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

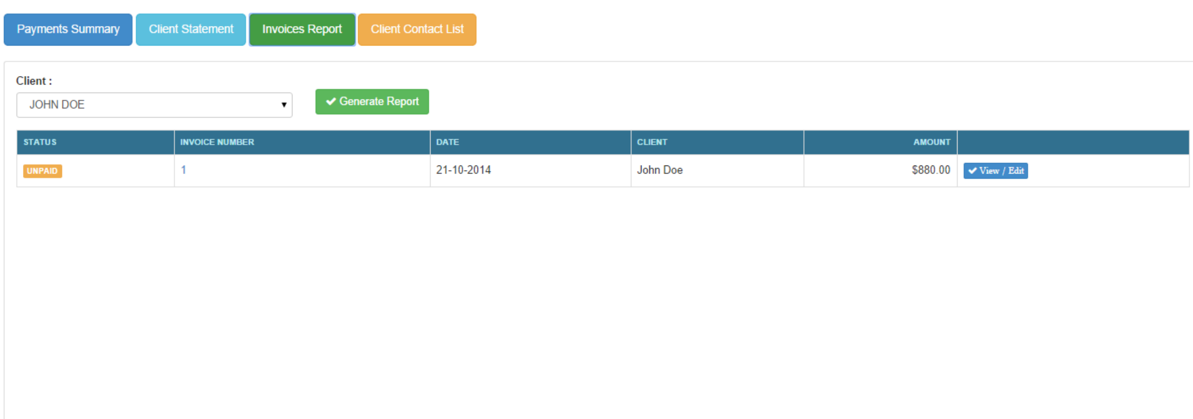
To view the client statement report click on the client statement button

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



c. Invoices Report

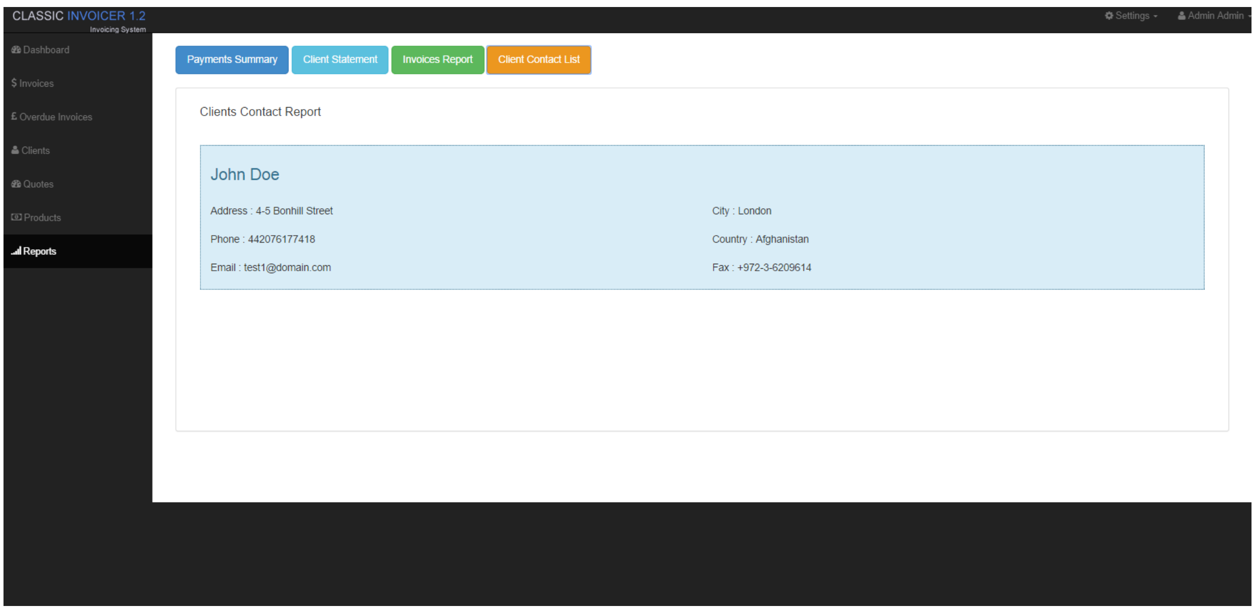
Invoices report displays all the invoices that have been generated so far, to display the invoices report click on the invoices report button. The report can be for all clients or for a particular client. Below is an example of an invoices report.



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

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



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