



User Manual



INVOICE

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How Can I install Invoice add-on?

Requirements

- * Apache with `mod_rewrite`
 - * Enable curl in php.ini
 - * Change the 'post_max_size' and `upload_max_filesize` to 200Mb in php.ini
- * PHP 5.4 or higher and less than PHP 7
- * MySQL 4.1 or higher
 - * If STRICT mode is On, turn it Off.

Installation

Below prerequisites need to be taken care of prior to installation.

The most important thing is if you have already purchased any add-on before 16th July 2016, then contact us at "support@orangescrum.org" before you proceed to the following.

Note: If you have already installed the **AddonInstaller** before then no need to install it again. Only exception is if you are finding any new version of installer or you have not installed before then follow the below steps for successful and seamless installation.

- Make sure to keep a backup of your existing "app" folder of your current working directory.
- Extract the zip file(AddonInstaller-V1.0.zip) to your desktop.
- Remove the existing "app" folder from your working directory then copy and paste the extracted "app" folder inside "AddonInstaller-V1.0" to your working directory.

- If you are using local machine as storage (excluding Amazon S3), please replace the folder, named "files" inside the "app/webroot" folder from the back up to the current "app/webroot" folder.
- Give **write permission** to "**app/Config**", "**app/tmp**", "**app/Plugin**" and "**app/webroot**" folders.

For Example:-`chmod -R 777 app/Config`

`chmod -R 777 app/tmp`

`chmod -R 777 app/Plugin`

`chmod -R 777 app/webroot`

- Import the "**installer.sql**" files from the extracted files to your current database. If you have already imported installer.sql before then no need to import it again. Only exception is if you are finding any new version of installer.sql then import to your current database.
- Do necessary changes to "**constants.php**" and "**database.php**" inside "**app/Config**" folder again as you have done earlier. For Example SMTP email credentials in constants.php and database credentials in database.php.
- Run your website once.

Ex. `http://localhost/orangescrum` (if you are using localhost)

`http://127.0.0.1/orangescrum` (if you are using IP)

`http://myprojects.orangescrum.com` (if you are using any valid domain)

Note: if you are facing any issue or seeing any blank page after doing all the above steps, then just do the following once.

- Replace "**Configure::write('debug',0);**" with "**Configure::write('debug',2);**" in the **app/Config/core.php**. Run the web url once and restore the debug value to 0 again.

i.e **Configure::write('debug',0);**

Congratulations!!

Add-on Installation:-

- Download the Add-on zip file.
- Place the downloaded zip file(Ex. Timelog-V1.0.zip) in the "app/webroot" folder.
- Log in to the application.
- To install the add-on(Ex. Time log add-on) run below link once and follow the instructions.

Ex. <http://.../install/invoice> (for invoice add-on)

<http://.../install/timelog> (for Time Log add-on)

Note: <http://...> means your Orangescrum access URL.

Ex. <http://localhost/orangescrum> (if you are using localhost)

<http://127.0.0.1/orangescrum> (if you are using IP)

<http://myprojects.orangescrum.com> (if you are using any valid domain)

- Do the same for other add-ons.

Ex. <http://.../install/invoice> (for Invoice add-on)

<http://.../install/taskstatusgroup> (for Task Status Group add-on)

<http://.../install/ganttchart> (for GanttChart add-on)

<http://.../install/recurringtask> (for Recurring Task add-on)

<http://.../install/api> (for API add-on)

<http://.../install/chat> (for Chat add-on)

<http://.../install/clientmanagement> (for Client Management add-on)


<http://.../install/projecttemplate> (for Project Template add-on)

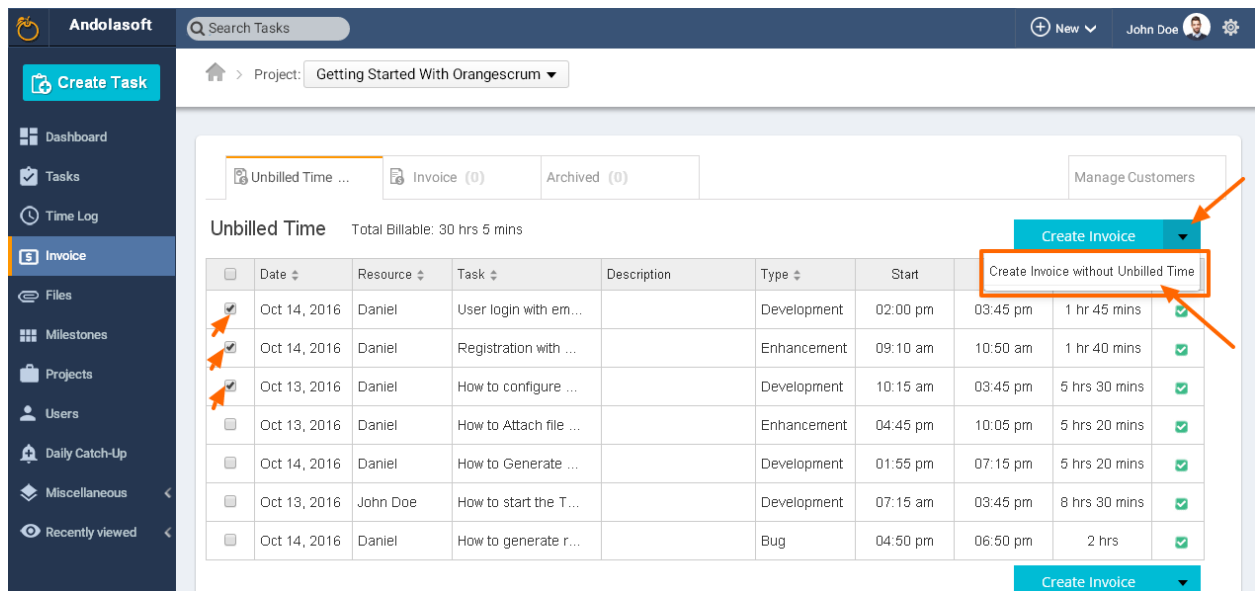
Note: you can find notification.js, node-js-installation-linux.pdf, node-js-installation-windows.pdf file in app/plugin folder after install the chat plug-in.

For Upgrading AddonInstaller:-

- Download the AddonInstaller zip file.
- Before installing updated AddonInstaller, make sure to keep a backup of your existing "app/Plugin" and "app/webroot/files" folders.
- Then follow the steps written above to install AddonInstaller.
- After installing the new AddonInstaller, Copy all the folders inside "app/plugin" backup folder to the new "app/Plugin" folder.
- Also copy all the folders inside "app/webroot/files" backup folder to the new "app/webroot/files" folder.

How to create Invoice?

- Go to Invoice section by clicking this  icon on left hand side menu panel. It will display all unbilled time.
- Check one or more “Time log entries” and click on “Create Invoice” or button



Andolasoft Search Tasks New John Doe

Create Task

Dashboard Tasks Time Log Invoice Files Milestones Projects Users Daily Catch-Up Miscellaneous Recently viewed

Project: Getting Started With Orangescrum

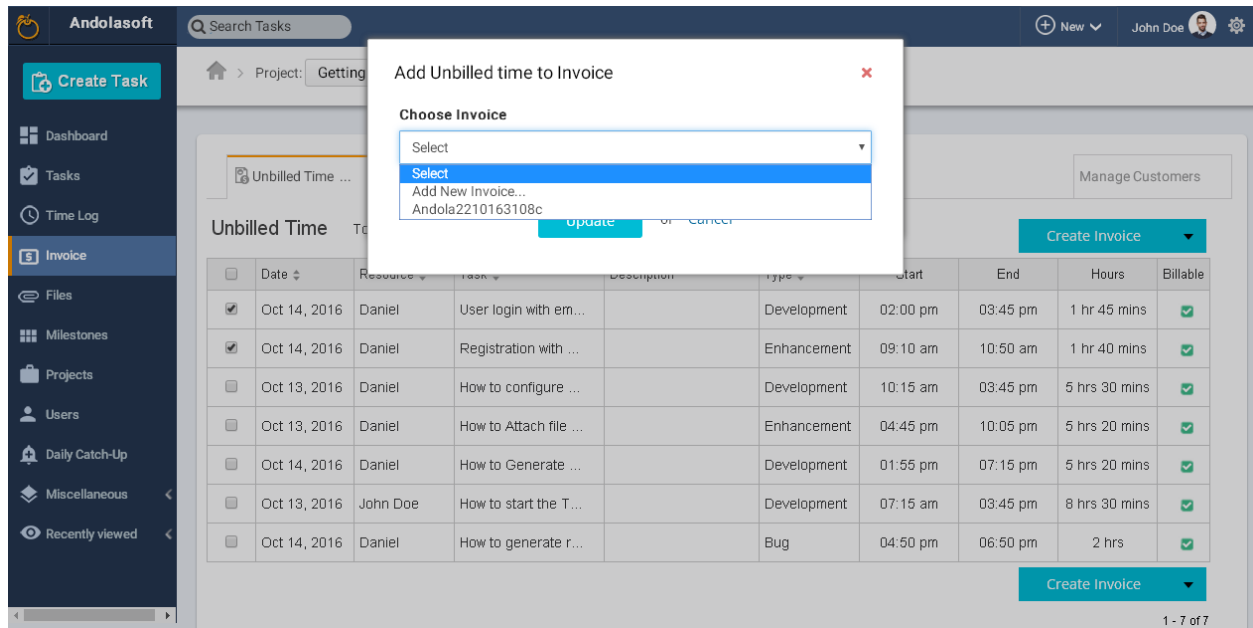
Unbilled Time Invoice (0) Archived (0) Manage Customers

Unbilled Time Total Billable: 30 hrs 5 mins

	Date	Resource	Task	Description	Type	Start	End	Duration	Status
<input checked="" type="checkbox"/>	Oct 14, 2016	Daniel	User login with em...		Development	02:00 pm	03:45 pm	1 hr 45 mins	✓
<input checked="" type="checkbox"/>	Oct 14, 2016	Daniel	Registration with ...		Enhancement	09:10 am	10:50 am	1 hr 40 mins	✓
<input checked="" type="checkbox"/>	Oct 13, 2016	Daniel	How to configure ...		Development	10:15 am	03:45 pm	5 hrs 30 mins	✓
<input type="checkbox"/>	Oct 13, 2016	Daniel	How to Attach file ...		Enhancement	04:45 pm	10:05 pm	5 hrs 20 mins	✓
<input type="checkbox"/>	Oct 14, 2016	Daniel	How to Generate ...		Development	01:55 pm	07:15 pm	5 hrs 20 mins	✓
<input type="checkbox"/>	Oct 13, 2016	John Doe	How to start the T...		Development	07:15 am	03:45 pm	8 hrs 30 mins	✓
<input type="checkbox"/>	Oct 14, 2016	Daniel	How to generate r...		Bug	04:50 pm	06:50 pm	2 hrs	✓

Create Invoice Create Invoice without Unbilled Time

- It will pop up a window to select either to create a new invoice or add it to existing invoice. Then click on “Update” button.



- It will redirect to create invoice page where you can enter invoice number. It should be alpha numeric. This field is mandatory. And also this number cannot be duplicated in one company.
- Then select one term from terms drop down list. Terms are the number of days to pay the bill. According to the term selected, it changes the due date by which customer has to pay the bill. User can also manually change the due date.
- Then pick an invoice date. It is the date for which invoice has been created.
- Then provide the billing from address. This is the address of the company who is creating the invoice.


Unbilled Time ...

Invoice (1)

Archived (0)

New Invoice

Manage Customers



Billing From

2059 Camden Ave. #118,
San Jose, CA – 95124
(408) 625 – 7188



Customer

Choose a Customer ▼

Billing To

Invoice

Invoice#:	
Terms:	Due on receipt ▼
Invoice Date:	Oct 27, 2016
Due Date:	Oct 27, 2016
Balance Due	USD 0.00

Sl#	Date	Description	Billable Hours	Rate	Amount	Action
1	Oct 14, 2016	User login with email and password	1.8			
2	Oct 14, 2016	Registration with pricing plan details and subscription	1.7			

+ Add Line-Item

Subtotal

0.00

Discount Percent ▼

0.00

Tax (%)

0.00

Total Amount

USD 0.00

Remittance details

Note

Save & Send ▼

or Cancel

Preview & Print

- Then select one customer from the customers drop down list. You can also add customer by selecting “+ Add New Customer” option.

Customer

Choose a Customer ▼

+ Add New Customer

Marry Michel Cargandio

Mrs Saa Kha

Mr Surya Rao

zin xeng huin

Due Date:

Oct 27, 2016

Balance Due

USD 0.00

		Billable Hours	Rate	Amount	Action
S	mail and password	1.8			

- Then provide the **Billing To** address which is the address of the customer.
- Then in line item pick a date for which date invoice is created.
- Provide the description.

- Then enter the quantity. Here quantity refers to the hour(s) spent on that particular item.
- Then enter rate, which is the unit price per hour.
- If you want to add more line item, you can do so by clicking on “+ **Add Line-item**” button.
- Then select the discount mode whether percent or flat and enter discount amount.
- Then enter tax amount in percentage.
- You can also upload your company logo at the top left hand side of the page. The logo must be smaller than 2MB in size. For the first time while creating invoice, if company logo is present it will be shown otherwise it will display no image. While editing image if there is no image for that company it will be stored as company logo. Otherwise it will be stored as that invoice logo.


Unbilled Time ...

Invoice (1)

Archived (0)

Andolasoft123c28

Manage Customers



Billing From
2059 Camden Ave. #118,
San Jose, CA – 95124
(408) 625 – 7188




Customer

John Doe

Billing To
John Doe, California, USA

Invoice

Invoice#:	Andolasoft123c28
Terms:	Due on receipt
Invoice Date:	Oct 27, 2016
Due Date:	Oct 31, 2016
Balance Due	USD 367.08

Sl#	Date	Description	Billable Hours	Rate	Amount	Action
1	Oct 14, 2016	Blog Design	5	28.00	140.00	
2	Oct 14, 2016	Theme Design	7	25.00	175.00	
3	Oct 27, 2016	Blog Post & Image banner	2	15.00	30.00	

+ Add Line-Item

Subtotal

345.00

Discount Percent

5

17.25

Tax (%)

12

39.33

Total Amount

USD 367.08

Remittance details

Note

Thank you for choosing Andolasoft!

Save & Send

or

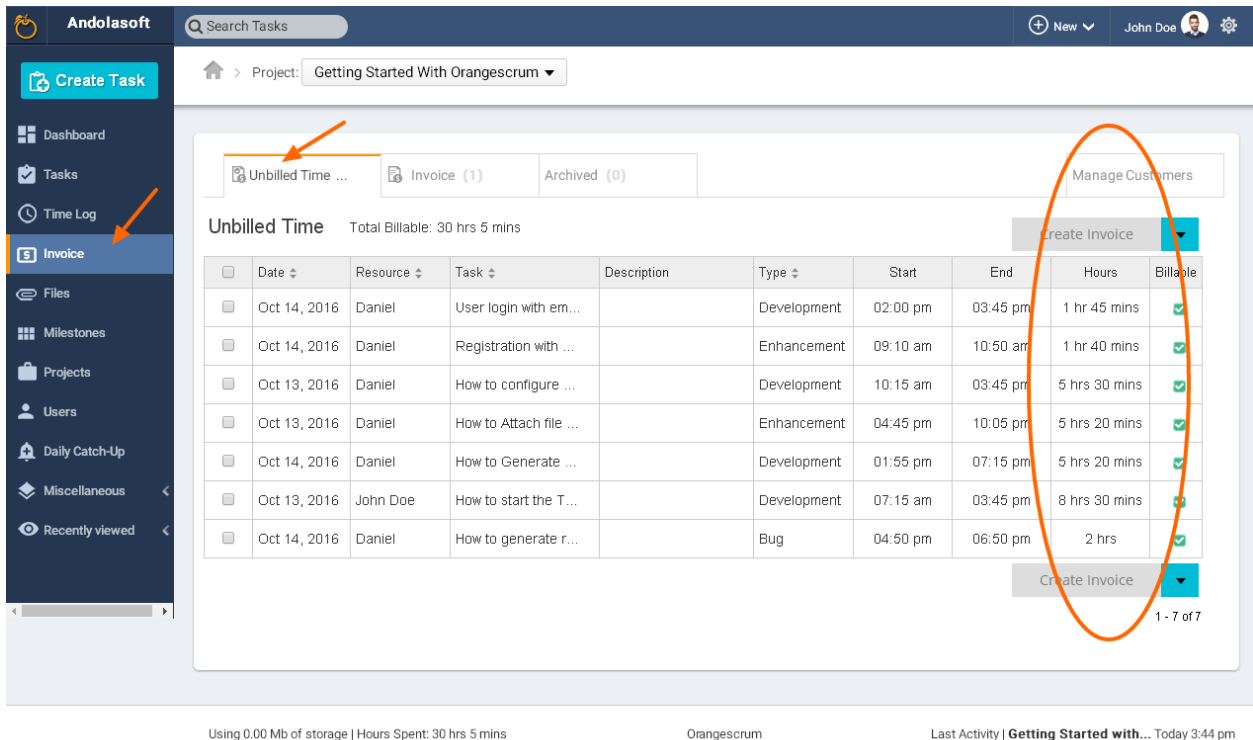
Cancel

Preview & Print

- Click on **“Save & Send”** button to save invoice and send email to customer.
- Click on **“Save & Download”** button to save invoice and download it as pdf.
- Click on **“Save and Close”** button to save invoice and go to invoice list page.
- Click on **“Save and New”** button to save invoice and create another invoice.

How to see unbilled time?

- Go to the Invoice page by clicking on the Invoice button from the menu panel.
- Click on “Unbilled Time” tab to view all unbilled time.



Andolasoft

Search Tasks

New John Doe

Create Task

Dashboard

Tasks

Time Log

Invoice

Files

Milestones

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Users

Daily Catch-Up

Miscellaneous

Recently viewed

Project: Getting Started With Orangescrum

Unbilled Time ... Invoice (1) Archived (0) Manage Customers

Unbilled Time Total Billable: 30 hrs 5 mins Create Invoice

	Date	Resource	Task	Description	Type	Start	End	Hours	Billable
<input type="checkbox"/>	Oct 14, 2016	Daniel	User login with em...		Development	02:00 pm	03:45 pm	1 hr 45 mins	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Oct 14, 2016	Daniel	Registration with ...		Enhancement	09:10 am	10:50 am	1 hr 40 mins	<input checked="" type="checkbox"/>
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<input type="checkbox"/>	Oct 13, 2016	Daniel	How to Attach file ...		Enhancement	04:45 pm	10:05 pm	5 hrs 20 mins	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Oct 14, 2016	Daniel	How to Generate ...		Development	01:55 pm	07:15 pm	5 hrs 20 mins	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Oct 13, 2016	John Doe	How to start the T...		Development	07:15 am	03:45 pm	8 hrs 30 mins	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Oct 14, 2016	Daniel	How to generate r...		Bug	04:50 pm	06:50 pm	2 hrs	<input checked="" type="checkbox"/>

Create Invoice

1 - 7 of 7

Using 0.00 Mb of storage | Hours Spent: 30 hrs 5 mins

Orangescrum

Last Activity | Getting Started with... Today 3:44 pm

How to see invoice list?

Click on “Invoice” tab to see invoice list.

Andolasoft Search Tasks New John Doe

Create Task

Dashboard Tasks Time Log

Invoice

Files Milestones Projects Users Daily Catch-Up Miscellaneous Recently viewed

Project: Getting Started With Orangescrum

Unbilled Time ... Invoice (2) Archived (0) Manage Customers

Invoice

Invoice #	Invoice Date	Customer	Due Date	Amount	Paid	Action
Andola2210163108c	Oct 24, 2016	---	Oct 24, 2016	0.00	✗	
Andola135c28	Oct 27, 2016	John Doe	Oct 31, 2016	344.74	✗	

1 - 2 of 2

How to see customers?

Click on “Manage Customers” tab to see all customers of company..

Andolasoft Search Tasks New John Doe

Create Task

Dashboard Tasks Time Log

Invoice

Files Milestones Projects Users Daily Catch-Up Miscellaneous Recently viewed

Project: Getting Started With Orangescrum

Unbilled Time ... Invoice (2) Archived (0) Manage Customers

Customers

Name	Organization	Address	Currency	Status	Action
John Doe			USD	Active	
Michel Cargandio		Sydney, Australia	AUD	Active	
Rakesh Singh	MIB	secret, Mumbai, India, 761020	INR	Active	
Saa Kha	QuikLeads Solutions	France, 34534	CHF	Active	
Surya Rao			AMD	Active	

1 - 5 of 5

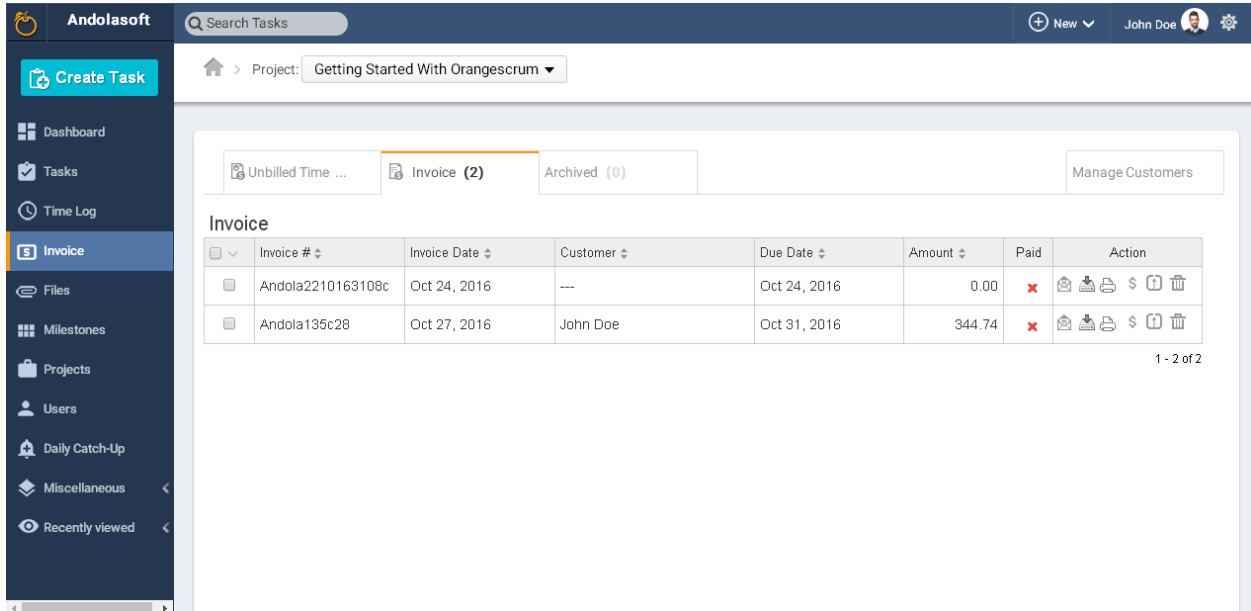
How to create Invoice without unbilled time?

- Go to Invoice section by clicking on “Invoice” icon on left hand side bar. It will show all unbilled time.

- Click on right side down arrow of “Create Invoice” button on “Create invoice without unbilled time”. It will redirect to create invoice page with an empty form.

How to modify an invoice?

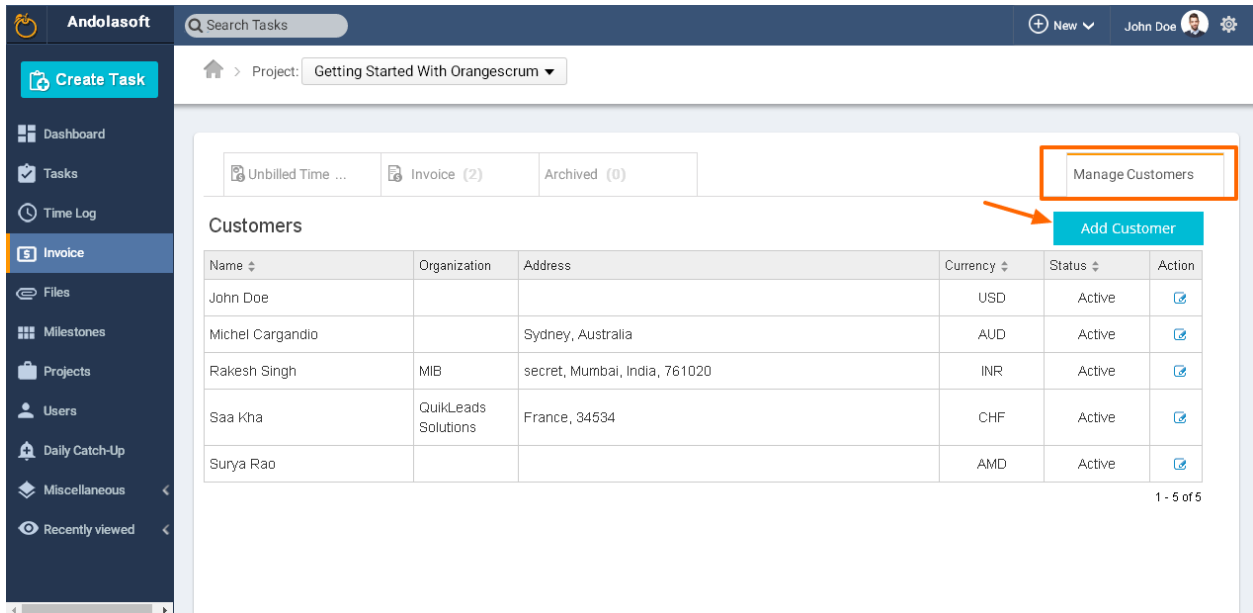
Click on “Invoice” tab and click on any invoice to modify it.



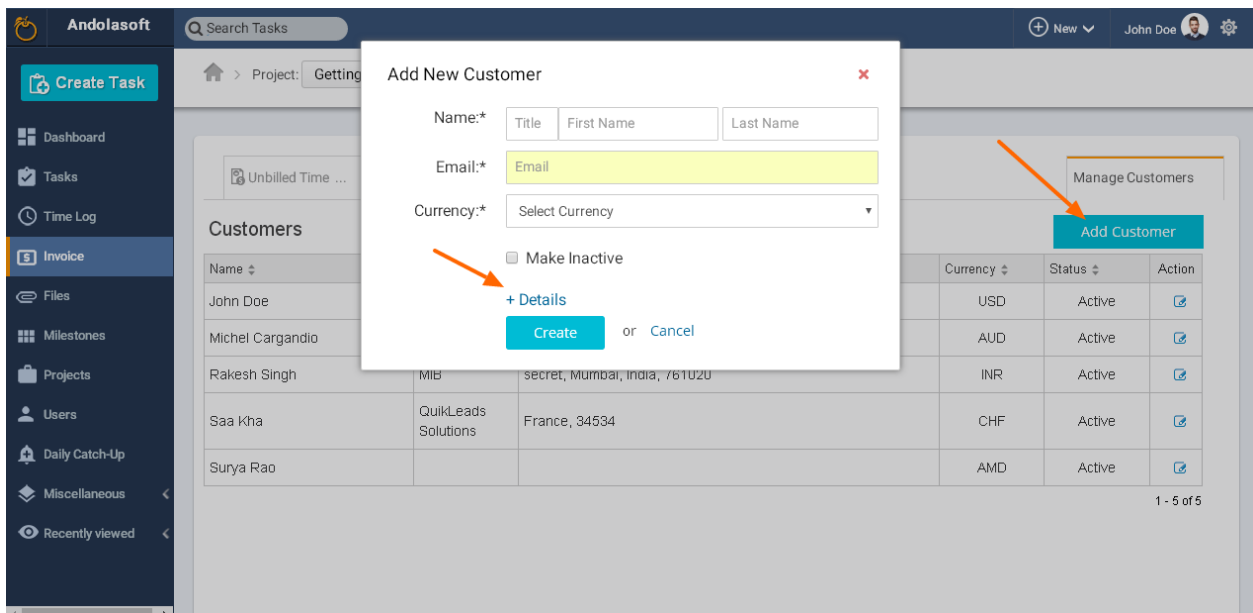
Invoice #	Invoice Date	Customer	Due Date	Amount	Paid	Action
Andola2210163108c	Oct 24, 2016	---	Oct 24, 2016	0.00	×	
Andola135c28	Oct 27, 2016	John Doe	Oct 31, 2016	344.74	×	

How to add customer?

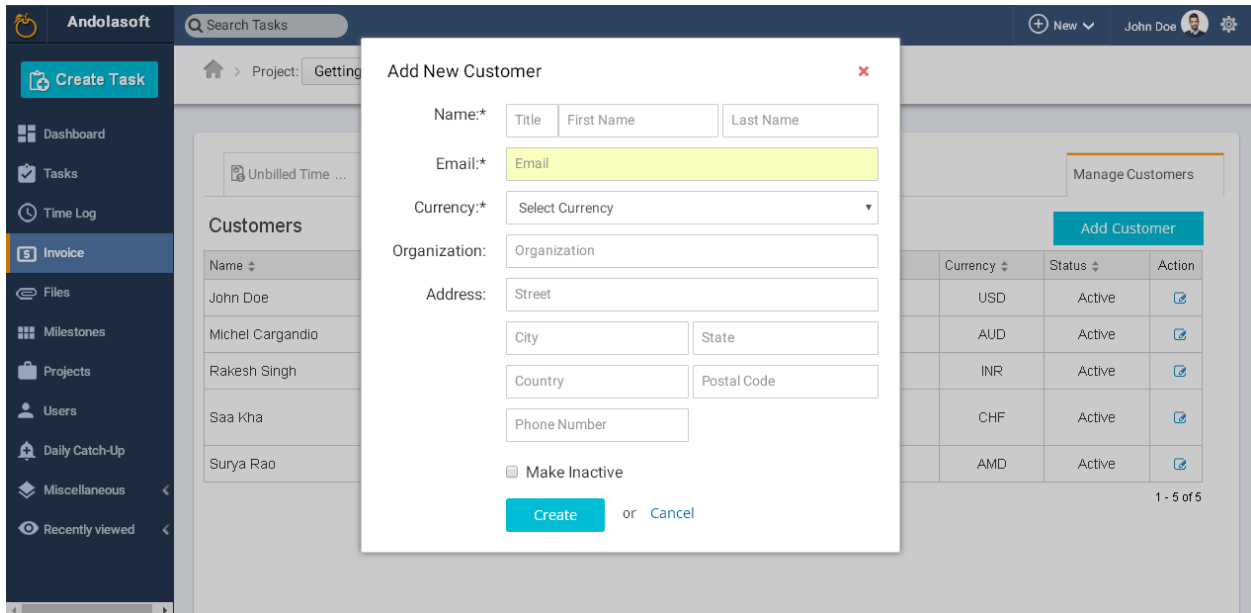
- Click on “Manage Customer” tab and then click on “Add Customer” button. It will open the pop-up to add customer details.



- Enter Customer name, email and select currency and click on “Create” button to add customer.

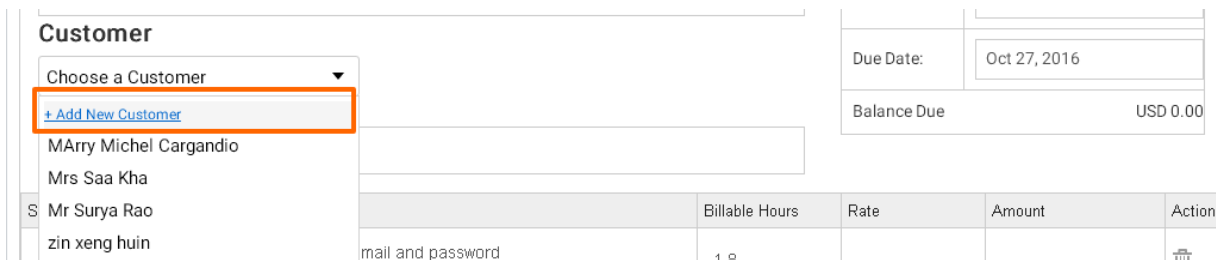


- If you want to add more detail for customer, click on “+ Details” and enter more detail of customer.

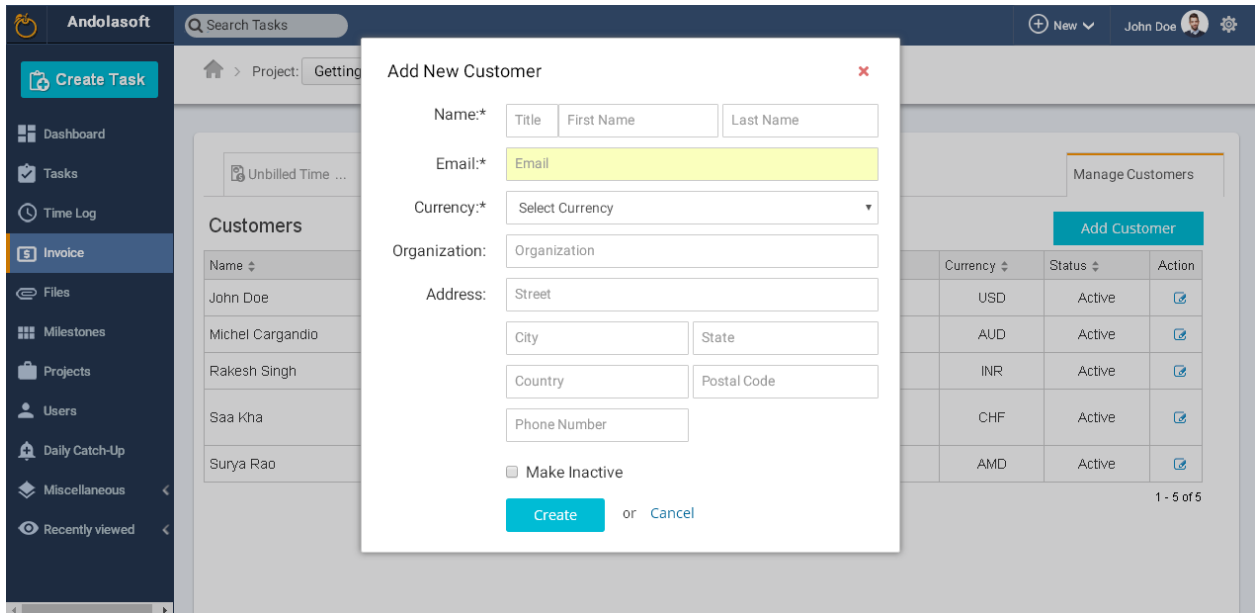


How to add customer while creating Invoice?

- While creating invoice, click on “Customer” drop down and select “+ Add new Customer”. It will open a pop-up to enter customer details.
- Enter Customer name, email and select currency and click on “Create” button to add customer.



- If you want to add more detail for customer, click on “+ Details” and enter more detail of customer.



How to manage customers?

- Click on “Manage Customer” tab. It will show all existing customers of the company.

Unbilled Time ...

Invoice (2)

Archived (0)

Manage Customers

Customers

Add Customer

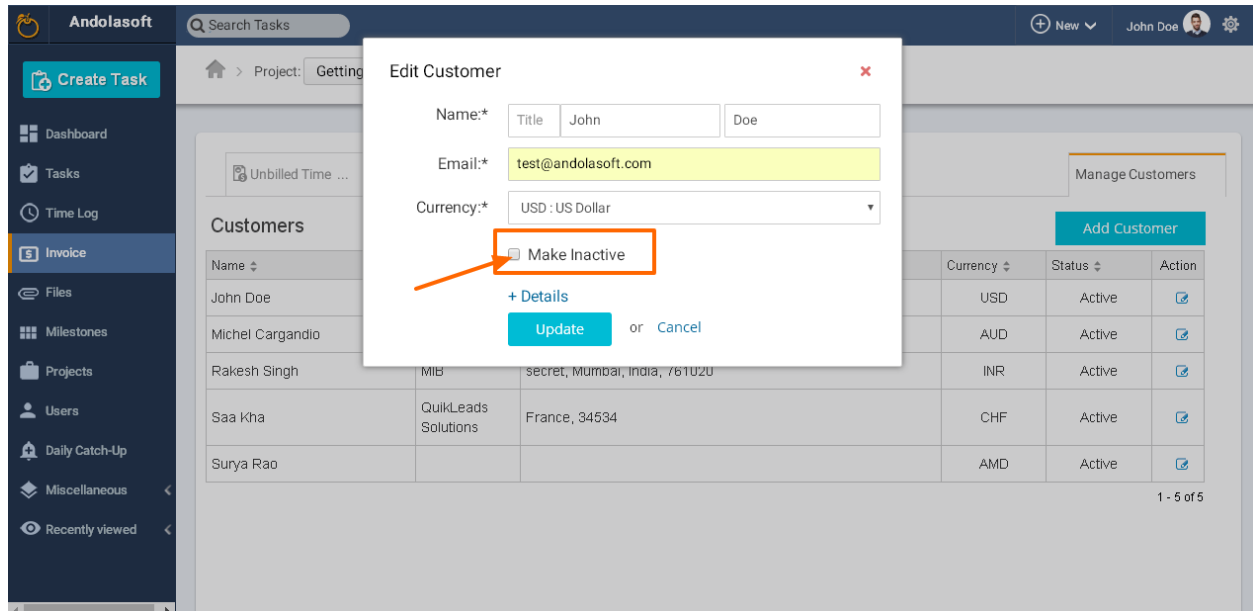
Name	Organization	Address	Currency	Status	Edit
John Doe			USD	Active	
Michel Cargandio		Sydney, Australia	AUD	Active	
Rakesh Singh	MIB	secret, Mumbai, India, 761020	INR	Active	
Saa Kha	QuikLeads Solutions	France, 34534	CHF	Active	
Surya Rao			AMD	Active	

1 - 5 of 5

- Click on right side edit icon to modify details of an existing customer.

How to change status of customer?

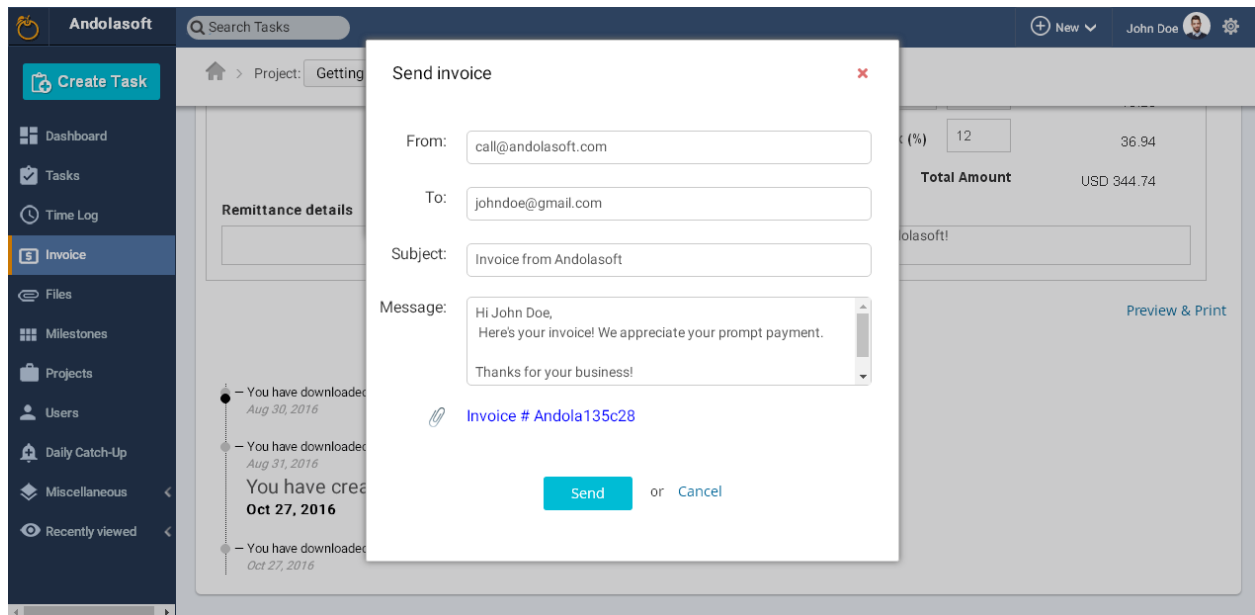
While adding or edit of a customer, check “Make Inactive” check box to make a customer inactive and uncheck it to make customer active again.



How do I send invoice to customer?

While creating invoice click on “Save & Send” button. It will pop-up a window.

In that pop up window, all the fields except **To** such as From, Subject and Message are pre-filled. You can also change those.

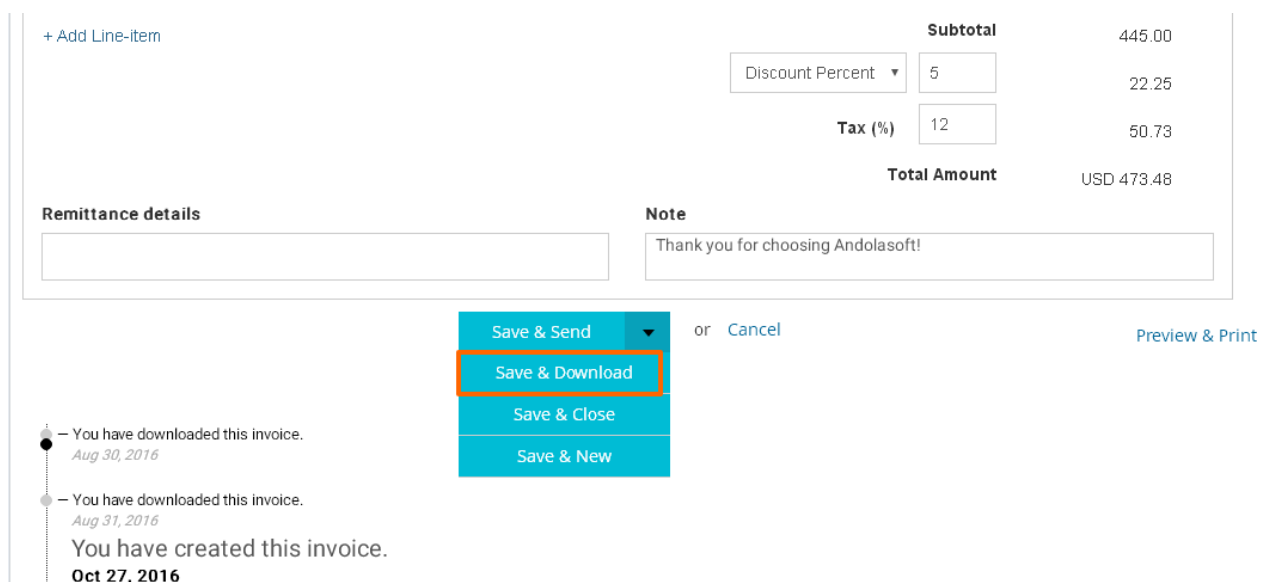


Then enter customer's email address to whom Invoice will be sent in **To** text box.

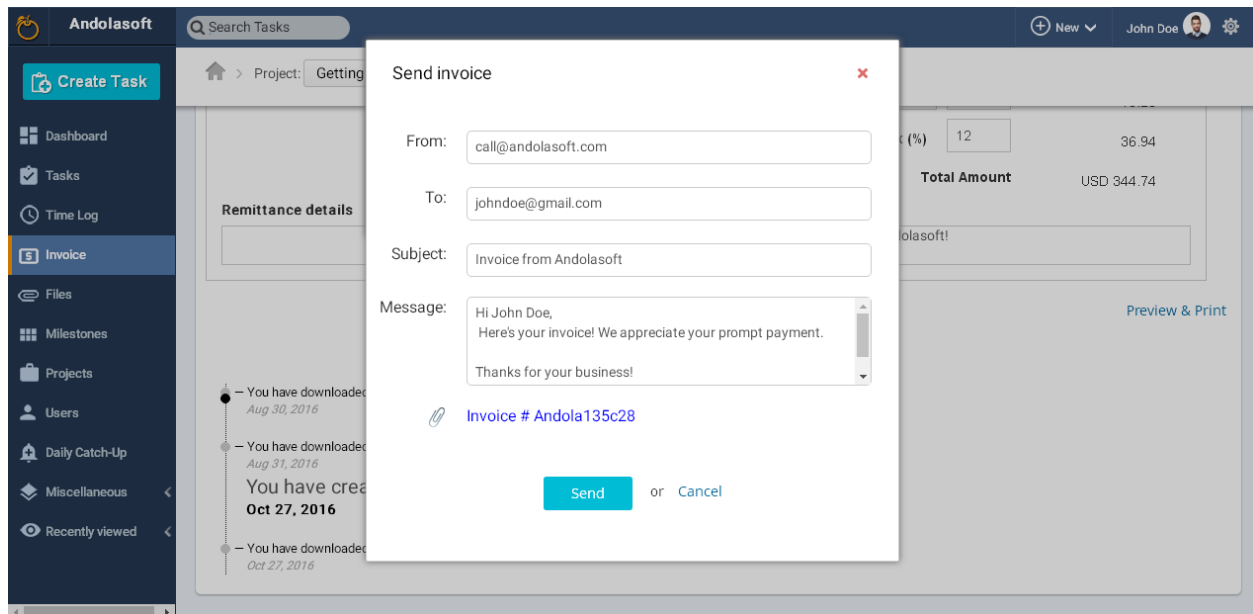
Then click on "Send" button to send Invoice.

How Do I download Invoice?

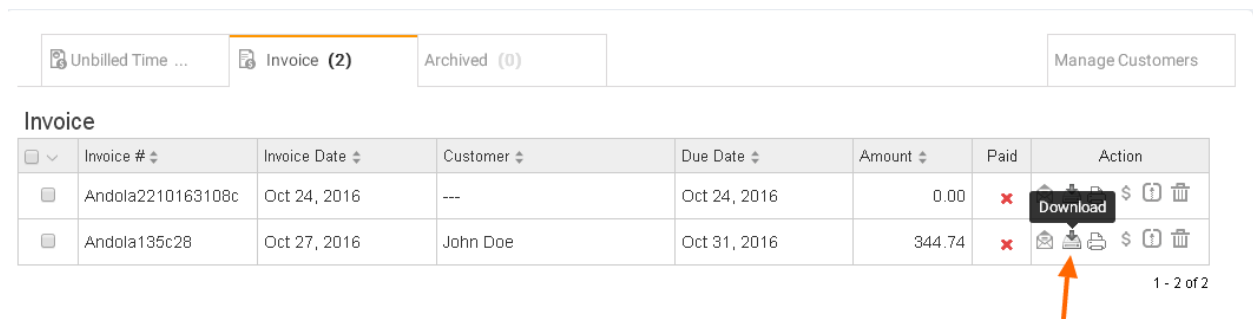
While creating invoice click on "Save & Download" button to download the invoice as pdf.



Also while sending invoice to customer by clicking on the attachment the invoice will be downloaded as pdf.

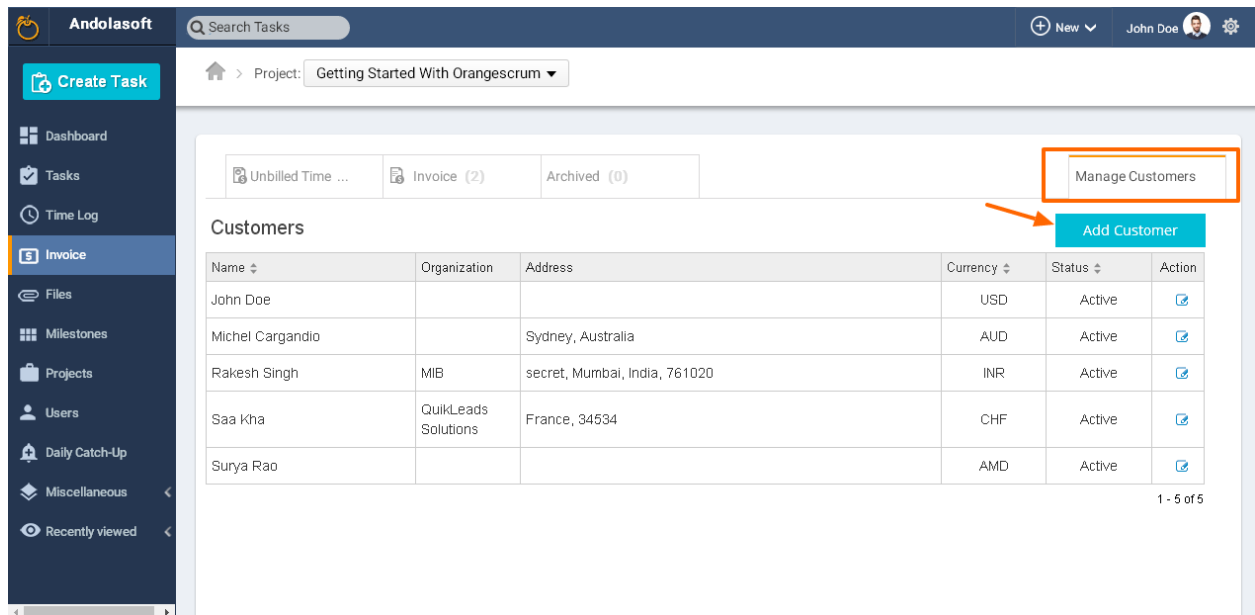


Or Go to the Invoice tab, navigate to Action tab & click on the download icon to download the invoice PDF.

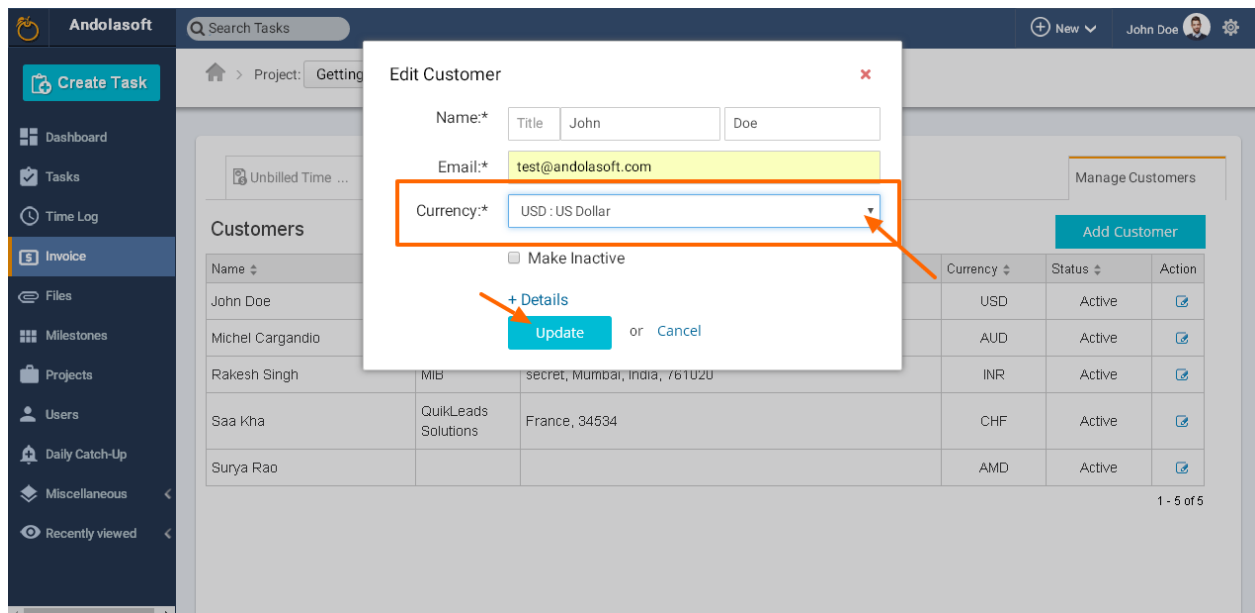


How can I change my currency setting in invoice?

- You can change the invoice currency from the “Manage Customers” section under “Invoices”.
- Follow the steps below to change the currency;
- Navigate to “Invoices”, click on “Manage Customers” as shown in screenshot below.



- Select the customer for whom you want to change the 'Invoice Currency' then click on 'Edit'.



- Select the currency you want billing in the invoice in the 'Edit Customer' pop-up window and click on 'Update'.
- Now navigate to 'Unbilled Time' Tab and click on 'Create Invoice' blue button

- While on the 'New Invoice' Tab, Select the same customer that you had made changes for and the currency will automatically reflect on the 'Invoice'.