

Version

4

SIMPLE INVOICE MANAGER

to keep track of your invoices

User Guide

Installation

Requirements:

*PHP8.1+ (**PHP8.2** default)*

*MySQL 5.7.10+ (**MySQL 8** recommended)*

PHP8

PHP8.1+ is required

Installation steps

Please follow the installation steps below

1. Please upload all the files & folders to your server.
2. You can access the installer by adding `/install`` at the end of your domain
``https://yourdomain.com/install``
``https://yourdomain.com/subfolder/install``
``https://subdomain.yourdomain.com/install``
3. Please prepare these details (mentioned at installation step 1)
4. If installer give any server error, please enable (step 2). If you are not sure, you can check with your server admin
5. Please provide the details of your purchase, database, mail and user account (step 3). For purchase verification, the username is Envato username that you use to login to codecanyon.net and themeforest.net The purchase code is in your license file, please download the license to get purchase code.
6. Finalize the installation (final step 4).

Update Guide

Requirements:

*PHP8.1+ (**PHP8.2** default)*

*MySQL 5.7.10+ (**MySQL 8** recommended)*

We are sorry but the version 4 is not completable with version 3, so please install version 4 and import the products, customers and update settings to use the new version.

TO UPDATE VERSION 3 TO LATEST VERSION

Please backup `.env`` file and then upload the latest files & folders to replace the old. Lastly you need to run the migration command as following

```
# cd /path/to/install/folder  
php artisan migrate --force
```

If you have any question or require further information, you should ask support question at support portal <https://tecdiary.net/support>

User Manual

Simple Invoice Manager is open products based invoicing solution.

Version 4 is rewritten using Laravel, Inertia and Vuejs. We have moved to more simple design. It has dark/light mode that you can switch from top bar and soft delete option that allow you to delete the record and then restore it. If you delete the record permanent, then those will be deleted form database and no option to restore them.

As version 4 is still beta so there could be errors or some missing options. We will update it to match the current version.

The major enhancement in version 4 is custom fields. You can add custom fields under settings and those will be added to the forms. This will help you to have extra inputs to collect the information as your business requires.

Dashboard

The dash has the last 30 days comparison of invoices with quotations and customers. Below are the invoice statistics and quick links to products, customers, invoices and quotations.

We haven't added any charts but if get request will consider.

Top Menus

The menus are in top bar and simplified to use less and easy to member.

Dashboard

Orders → Invoice, Payments & Quotations

Data → Customers & Products

Settings → System Settings, (Seller) Companies, Users, Tax Rates, Notes, User Roles & Custom Fields

Reports → Daily Invoices, Monthly Invoices, Invoices Report, Payments Report & Activity Logs

SIMPLE STOCK MANAGER

At the right side, we have language switch, theme mode and user menu (profile). On small screens all the menus can show/hide with hamburger menu.

Customers

Customer is a company/person who buys goods or services from your business (company under settings)

Data menu has option for listing, add and import customers.

The listing page can be searched and filtered. The first selection column can be used to delete multiple records. The last actions column has edit and delete menu icons.

The balance column shows the customer balance amount, and you can click it to open the statement.

For payment, please go to list invoice (under orders menu) and add payment for the invoice. There is no option to accept payment for multiple invoices. If you would like this feature, please request it at support portal and we will consider it in future updates.

Products

Products are goods or services that you sell to your customers.

Simple Invoice Manager is open product-based invoicing solution that means you don't have to add products. But it is helpful to add commonly used products and select them to fill the invoice/quotation form conveniently.

The listing page has search and filter option with actions column to edit or delete the product.

Invoices

An invoice is a time-stamped commercial document that itemizes and records a transaction between a buyer (customer) and a seller (company). If goods or services were purchased on credit, the invoice usually specifies the terms of the deal like due date.

The invoices menu is under Orders and the listing page can be searched and filtered. The first selection column can be used to delete multiple records. The last actions column has add payment, view, edit and delete menu icons. The listing page has the date filter to list the invoice from start to end date

Users, Profile and Roles

You can add roles under settings and then edit them to set permissions. Add users with roles so they can access the management portal.

The profile has the option to update user data by themselves, change password, enable/disable two-factor authentication and to logout from other browser sessions.

S I M P L E S T O C K M A N A G E R

Settings

You update app settings and manage item categories as you need.

Item Low Stock Alerts

The top bar will have alert/bell icon, if any item has reached the alert quantity. Please click the icon to list all the item those have reached the alert quantity.

Developer Guide

Adding language

You can add language by following these steps.

1. Duplicate ``lang/en.json`` and ``lang/en/`` to your language and translate
2. Edit ``lang/languages.json`` and add your language entry
3. Build the application ``npm install && npm run build``

Modifying the code

The simple stock manager is developed using **Laravel** and **Vuejs**. You can modify the PHP (Laravel) code as you need. If you modify the front-end code (Vuejs, Javascript) ``resources/js/`` you will need to rebuild the app using ``npm run build`` after installing the dependencies with ``npm i``

For development, you can use ``npm run dev`` and once all modifications done build the production version with ``npm run build`` and deploy to your server.