MyClientBase User Guide

http://www.myclientbase.com
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Summary

MyClientBase is a free and open source web-based application which allows simple management of invoices and clients. It is written in PHP using the fantastic CodeIgniter (http://www.codeigniter.com) framework. MyClientBase is intended to provide a simple, intuitive and straight to the point interface without complicating matters by introducing all sorts of ridiculous features.

The project is and has always been actively developed by a single developer, but it is always open to the suggestions of the community and it implements reasonably suggested features and enhancements that the community provides.

How to Install

1. **Download MyClientBase**

   Visit http://www.myclientbase.com and download the latest version.

2. **Unpack and copy the files to your web server**

   Copy the files into the folder which will store the application. For example, if MyClientBase will be accessed at http://www.your-server.com/invoices/, then copy the files to the invoices folder on the web server.

3. **Set Folder Permissions**

   Set the following folders to be writable:

   - /system/myclientbase/plugins/dompdf/lib/fonts/
   - /system/myclientbase/modules_core/invoices/views/invoice_templates/
   - /system/myclientbase/modules_core/payments/views/receipt_templates/
   - /uploads/

4. **Create an Empty Database**

   This is typically done through a MySQL management utility such as MySQL Administrator or phpMyAdmin.

5. **Configure the Database**

   Open /system/myclientbase/config/database.php and adjust the following variables:

   - $db['default']['hostname'] = 'your_db_hostname';
   - $db['default']['username'] = 'your_db_username';
   - $db['default']['password'] = 'your_db_password';
   - $db['default']['database'] = 'your_db_name';

6. **Complete the Install**

   Visit index.php/setup. If MyClientBase was installed to http://www.your-server.com/invoices/, then visit the following address in your browser to complete the installation: http://www.your-server.com/invoices/index.php/setup/. The Setup Utility will determine if this is an upgrade or a new installation and will guide you appropriately.

How to Upgrade

The upgrade version allows you to download a minimal set of files to upload to your web server. The upgrade version only contains the files necessary to upgrade your installation.

1. **Download MyClientBase**

   Visit http://www.myclientbase.com and download the latest version.

2. **Unpack and copy the files to your web server**
3. **File Permissions**

   Make sure the following folders are writeable:

   - /system/myclientbase/plugins/dompdf/lib/fonts
   - /system/myclientbase/modules_core/invoices/views/invoice_templates
   - /system/myclientbase/modules_core/payments/views/receipt_templates
   - /uploads

4. **Complete the Upgrade**

   Visit index.php/setup. The Setup Utility will determine if this is an upgrade or a new installation and will guide you appropriately.

How to Log In

Using a web browser, navigate to the URL at which MyClientBase was installed. This URL will determine whether or not a session is active and will redirect to the appropriate location.

The Dashboard

Menu Item: Dashboard

The Dashboard will be displayed upon first logging in to MyClientBase. The Dashboard contains a recent list of open and closed invoices, and may contain other dashboard widgets from custom modules. A horizontal menu bar will appear near the top of the window each time a user logs in. This menu bar allows for navigation throughout the application.

Client Management

Menu Item: Clients

A Clients menu item exists which contains menu sub-items for adding clients and viewing clients.

Adding Clients

Menu Item: Clients / Add Client

Clients must exist in the database before an invoice can be created. Clients are entered by using a simple form which collects the client's information. A client must exist before attempting to create an invoice for that client.

Contacts

Since a client might be a company instead of an individual person, specific contacts can be added to each client to store more detailed information.

Client Detail Report

Output a list of clients and their details to preview, or as an HTML or PDF report.

Invoice Management

Menu Item: Invoices

An Invoices menu item exists which contains menu sub items for creating invoices, viewing invoices and running reports.

Viewing Invoices

Menu Item: Invoices / View Invoices

Viewing invoices allows for a quick overview of the invoices in the database, along with total amounts, balances, links to generate a PDF or HTML invoice and action links (edit / delete).

Creating an Invoice

Menu Item: Invoices / Create Invoice

The first step in creating an invoice is to enter the invoice date, which defaults to the current date, and to choose the client. Pressing the Create Invoice button creates the invoice and allows the details to be entered. The following tabs are available on the Invoice Edit form:

Tab: Summary
The Summary tab allows basic properties of the invoice to be changed, such as the invoice date, due date and client. It also shows summarized information regarding the invoice, such as invoice amount, tax amount, amount paid, and remaining balance.

Tab: Items
The Items tab is where invoice items can be added, edited or deleted.

Tab: Payments
The Payments tab is where invoice payments can be added, edited or deleted. Once the amount of invoice payments equals the invoice balance, the invoice status will be considered as closed.

Tab: Taxes & Other
Global invoice tax rates can be configured on the Taxes tab. Multiple tax rates can be applied and each can be configured to apply itself before or after individual item taxes are applied. Shipping and discounts can also be entered on this tab.

Tab: Notes
The Notes field on this tab can be used to record notes specific to the invoice being edited. Tags can also be specified on this tab, which can be used to easily search for specific groups of invoices. Multiple tags should be separated by commas.

Applying Taxes

There are two ways in which taxes can be applied to an invoice. Global invoice taxes can be applied on the Taxes tab of the Invoice edit form. These taxes will be applied to all invoice items which are marked as Taxable. Tax can also be applied to individual invoice items by selecting the tax rate when editing the invoice item and marking the invoice item as Taxable.

Invoice Payments

Menu Item: Invoices / Payments

Viewing invoice payments allows for a quick overview of the payments in the database, along with action links (edit / delete). Invoice payments can also be accessed through also be accessed per invoice while viewing an invoice (Invoices / View Invoices / Edit).

Adding Invoice Payments

There are two different methods for entering invoice payments.

Method 1
Payments / Enter Payment

This method provides a list of invoices which currently have a balance.

Method 2
Invoices / View Invoices / Edit

This method works best when invoice payments are being entered at the same time as the invoice is being created. Clicking the Enter Payment button allows payment details to be entered for the current invoice.

Generating Payment Receipts

Click the receipt icon in the list of payments to generate a payment receipt.

Invoice Summary Report

Menu Item: Invoices / Invoice Summary Report

Invoice report provide a way to filter invoices based on date, status and client and also includes summarized information for the specified group of invoices.

Searching Invoices

Menu Item: Invoices / Search

The Invoice Search feature provides a way to quickly filter the list of invoices which is displayed. Invoices can be searched by date, client, and tags.

Generating an Invoice

Click the Generate Invoice icon to generate an invoice as PDF, HTML or email.

Creating a Quote

Menu Item: Invoices / Create Invoice

When creating an invoice, select “Quote Only” to create quotes for your clients. Quotes are not listed along with other invoices and are not included in overall totals unless specified. If a client has accepted a quote, simply change the Status from Quote to Invoice to change the quote to an invoice.

Viewing Quotes

Menu Item: Invoices / View Quotes

Quotes are kept outside of other invoice lists. Use this menu items to see quotes in the system.

Tax Rate Management

Menu Item: System / Tax Rates

Tax rates which can be applied to invoices on a global or per-item basis may be maintained here. For an invoice item to be affected by tax rates, the item must be marked as “Taxable”.

Creating Tax Rates

Menu Item: System / Tax Rates / Add Tax Rate

Create customized tax rates which can be applied to invoices and invoice items.

User Accounts

Menu Item: System / User Accounts

Information which is displayed on invoices, such as name, address, etc, are provided through the user account area. User accounts have access to log in to the system, so create accounts with caution. Client accounts should not be set up in the user accounts area (see Client Management).

Creating User Accounts

Menu Item: System / User Accounts / Create User Account

User accounts are entered by using a simple form which collects the user account information. Create user accounts with caution.

System Settings

Menu Item: System / System Settings

The System Settings area contains a lot of configurable global options for MyClientBase.

Application Settings

Application Version	Displays the currently installed version.
Database Backup	Provides a zip file of your MySQL database.

Dashboard Settings

Dashboard Override	Allows the dashboard to be overridden by a different module and method.
Show Open Invoices	Choose whether or not to display a short list of open invoices on the Dashboard.
Show Pending Invoices	Choose whether or not to display a short list of pending invoices on the Dashboard.
Show Recently Closed Invoices	Choose whether or not to display a short list of closed invoices on the Dashboard.
Show Overdue Invoices	Choose whether or not to display a short list of overdue invoices on the Dashboard.

Invoice Settings

Language	Change the default language.
Date Format	Change the default date format.
Default Tax Rate	Set the default invoice tax rate.
Default Open Invoice Status	A brand new invoice will default to this status.
Default Closed Invoice Status	An invoice with no balance will default to this status.
Invoices Due After (Days)	The number of days from when an invoice is opened to which it should be defaulted to as due.
Default Invoice Template	The default template that is selected when an invoice is generated.
Default Quote Template	The default template that is selected when a quote is generated.
Decimals in Tax Rates	The number of decimal places which may be used in tax rates for calculation purposes.
Invoice Logo	Upload a personalized logo to display on invoices.
Adjust Invoice ID	A numeric value which allows a higher invoice number to be set.
PDF Plugin	The default PDF plugin to use.
Recalculate Invoices	If for some reason your invoices do not seem to be calculated correctly, run this function to recalcalculate them all.

Currency Settings

Currency Symbol	The currency symbol to display.
Currency Symbol Placement	Display the currency symbol before or after the amount.
Decimal Symbol	Configure the symbol used for decimals.
Thousands Separator	Configure the symbol used for thousands separation.

Tax Identification Settings

Tax ID Number Label	The text label to appear on an invoice, such as “Tax ID Number”, or “VAT”
Tax ID Number	The tax ID number to display on invoices.
Include Tax ID on Invoice	Choose whether or not to display the tax ID number on invoices.

Email Settings

Protocol	Options: PHP Mail Function Sendmail SMTP
Path to Sendmail	(Sendmail option only)
SMTP Server Address	(SMTP option only)
SMTP Username	(SMTP option only)
SMTP Password	(SMTP option only)
SMTP Port	(SMTP option only)
Security	(SMTP option only) Options: None TLS SSL
SMTP Timeout	The SMTP server timeout in seconds.

Payment Settings

Default Receipt Template	The default template that is selected when a receipt is generated.

PDF Plugins

There are two PDF plugins which MyClientBase supports - dompdf and mPDF. MyClientBase comes shipped with dompdf and works in most cases, but if you have trouble using dompdf with UTF-8 characters, then you'll need to download the mPDF plugin.

domPDF

The domPDF plugin is included as the default PDF generator for MyClientBase because of its extremely small size and functionality. The biggest downside to domPDF is it won't output unicode characters. For unicode support, see the mPDF plugin.

mPDF

The mPDF plugin is a larger download, but contains unicode support.

Installing mPDF

1. Download mPDF (http://www.myclientbase.com/download_file/mpdf.zip)
2. Unpack the zip file and upload it to system/myclientbase/plugins/mpdf
3. System -> System Settings -> Change the PDF plugin to mPDF.

Language Translations

Before translating MyClientBase to your own language, check the Language Translation forum (http://www.myclientbase.com/forums) to see if it's already available.

Step 1: Create the Language Folder

Language folder: system/myclientbase/language/

Create a new folder for your language and copy the contents of the English folder into your new folder.

Step 2: Translate MyClientBase

From your new folder, open mcb_lang.php and provide translations for each of the variables listed.

For example:
$lang['default_tax_rate'] = "Default Tax Rate";

Would become:
$lang['default_tax_rate'] = "The Translated Value";

Step 3: Language Configuration

From your new language folder, open config.php and replace the 'language' and 'charset' values as appropriate.

Here is a general idea of what to use for the 'charset' value:

- win-1252 (Western European languages including English, Italian, Spanish, Portuguese, French, German, Dutch, Danish, Swedish, Norwegian, and Icelandic, which use the Latin alphabet)
- win-1251 (Languages that use the Cyrillic alphabet such as Russian, Bulgarian, Serbian, Macedonian and Bulgarian)
- iso-8859-2 (Supports Central and Eastern European languages that use the Latin alphabet, including Bosnian, Polish, Croatian, Czech, Slovak, Slovenian, Serbian, and Hungarian.)
- iso-8859-4 (Estonian, Latvian, Lithuanian, Greenlandic, and Sami.)
- iso-8859-7 (Greek)
  iso-8859-9 (Turkish)

The charset value is only used by the mPDF plugin to use the proper unicode characters on PDF output. It is not used by the default dompdf plugin nor is it referenced anywhere else within MyClientBase.

Step 4: CodeIgniter Translations

MyClientBase is written on top of the CodeIgniter PHP framework. CodeIgniter has many different language variables (not to be confused with MyClientBase language variables), and there are a number of translations already available here: http://codeigniter.com/wiki/Language_Translation/

Once you have found your language, unpack it into the new language folder you created in step 1.

Step 5: System Settings

Log in to MyClientBase and visit your System Settings area. Choose your new language from the dropdown and save the settings to apply it. Now you should be using MyClientBase in your own native language.

Step 6: Contribute!

Please contribute your translation to the community by posting a zip or tar of your language folder to the Language Translation forum (http://www.myclientbase.com/forums/).

License Information

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http://codeigniter.com/user_guide/license.html

Credits

MyClientBase is a community driven project which will always thrive on the participation of its members. Although each and every community member is an important piece of the project as a whole, the following people, organizations and projects have made MyClientBase possible.

Who	Why	Where
Jesse D. Terry	Author and developer of MyClientBase	http://www.myclientbase.com jessedterry@gmail.com
Warren Ramsey	Modular Extensions Library	http://code.google.com/p/modular-extensions-php5/
William G. Rivera	User Interface Design	http://www.williamgrivera.com
CodeIgniter	The PHP Framework for MCB	http://www.codeigniter.com
jQuery	The Javascript Library for MCB	http://www.jquery.com
PHP	Uhhh... do I have to say?	http://www.php.net
MySQL	Read “Why” for PHP	http://www.mysql.com