Website Cursor1

Request 1

I would like to create a website called cursor1 which will link to a loacalhost XAMPP database called “cursor1”. It will have one home page which just says this is my new database, please give it a modern look. It will then have a second page with a contact form which links to the database and in a table called “formresponse”. The contact page will have boxes for name, email address, telephone number. It will also include a larger box for a message. Please design all pages ina format which can be easily read on a desktop browser as well as a mobile phone.

Request2

This is great. Please can we change the folder structure so that each web page sits inside a folder to hide the .php reference in the browser. Then can we build a new webpage called “login” which show a username and password box on the screen. Below that it has a button to allow you to create new login which goes to a page where you can set up a new login which will be added to a table in the database called “login”. Once you have logged in using credentials matched to the “login” table it will take you to a new page where you can view the responses from the “formresponse” table.

Request3

Ok the website is working well locally but I now need to make some changes because I am going to now send it to my live website for testing. Please can we make changes so it works on both. One step will be to have the database links change so that it can point to either local host or livehosting (cpanel). Credentials for live hosting are $db\_host = "localhost"; // still 'localhost' on cPanel $db\_user = "a1e750tdxgba\_15Crossways"; $db\_pass = "Crossways15!"; $db\_name = "a1e750tdxgba\_cursor1"; I have already have a setup in place so that the local host is being cloned to a github repository which then is pushed to cpanel when changes occur. The website in cpanel has the following path html\_public/projects/cursor1. Please can you make all the changes needed in the website and also make changes to the database so it can be added in as a sql query creating a new database in the cpanel phpMyAdmin called “cursor1”

Request4

ok we are now working on the browser so thanks for that. I have a couple of changes. First on the login page the username box contains a reference to my live database when you first click the page so please can we remove that and leave it blank prior to the user adding credentials. Second the button at the bottom of the form below "dont have an account" is pure white so looks invisible, Please can you make it green and say "set up new account"

Request5

I would like to make some changes to the login along with the landing page once logged in and add some reporting. First I would like to add an “Account Type” section when setting up a new user account and give 3 choices. One would be Administrator” which gives full access to everything. One would be “Manager” which gives some access but not all, explained later. And finally “Basic” which only gives access to anything where the specific user is defined in the database. We would then change the landing page after login, currently called “admin” and showing the form response list. The landing page should now be called “practice” and become a portal with buttons to different pages, one being the old “admin” page which will now be called “Contact form responses”. Only those with Administrator access can see the contact form responses. We would like another page called “Clients” which goes to a new page with a list of clients, above the list it has a button which says “Add new client”. If you click to add a client you go to a new page to add details of new clients, the fields would be reference (primary key), name, contact, email, phone, year end, date added. When the details are added they will appear on the list of clients on the “clients” page. Only administrator and manager should be able to see the clients page. Then from practice page there would be another button called timesheet which goes to a new page timesheet where the person logged in can add an entry via a form to a database table called “timesheet” which includes the fields date, client (where you can only choose from entries in the clients table), Task (we will need a new button for task on the practice page which allows you to add a task to a database table called task and you can only choose tasks from that table), time in the format 0:00 and a description box with enough space for 100 characters. Then below that form we would show a particular chosen week Monday to Saturday and the day last posted would be highlighted and you would see all the timesheet entries on that day for the person logged in. There will be a calendar to the left of the page which allows you to choose the week being shown at the bottom of the page. All login types should see the timesheet form and table.

Request6

Timesheet now looks good on the phone except the header logout button runs over the page end to the right. Also if you click on an entry at the bottom it should bring up the data for the entry in the form above and allow you to edit and then an additional button at the bottom of the form appears to update. Form responses the header is too wide for the page. Please can you fix those.

Request7

Great. For the timesheet when you click on an entry can you also have the button for add entry which would allow you to add a new entry which effectively copies the one you have clicked on to update.

NEW QUERY CHAIN - JOBS

Hi! I'm working on Cursor1 (the PHP practice portal with timesheet, clients, and role-based access). I'd like to add a new feature Jobs. There would be a button on the practice page for “Jobs” which would list all Jobs which have not been archived listed by latest job. This would be accessed by Managers and Admin per login table. At the top there would be a button for “New Job“ which takes you to a form to set up a new job. We would set up a new table called “jobs” and this would have the common field Client from the “clients” table “name” and on the jobs form there would be a dropdown for Client in alphabetical order to choose from. If you start typing on that field it will bring up client names starting with those letters. Next there would be a field for client reference which would pull from the client table, again a dropdown and you could start typing to bring up references starting with what you type. Both client and client reference would autofill if the other one was selected. There would also be a client Task from the “tasks” table. A description field with attribute varchar100. Budget hours field. A “State” field which comes from a separate table “state” with options of Outstanding, Received, Prepare, Returned, Review, With Client, Paid not approved, Approved not paid, Submit, Completed, Other and Archived. A tick box with the name Urgent. A Partner field which comes from the login table and is a dropown of username. Also a Manager field from login table and preparer field from login table. Deadline date, Expected completion date, Received date, Assigned date, Completed date, Reviewed date, Sent to client date, Approved date, Submitted date, Archived date. Finally a Comments CharVar255.

New Query – Update Timesheet view

Hi! I'm working on Cursor1 (the PHP practice portal with timesheet, clients, and role-based access). I'd like to make some changes to the timesheet view. Please could we make the weeks full and starting on Monday through to Sunday. Under the timesheet entry form with the days below them could you add the total time for each day. Then allow each day to be clicked and it will become highlighted. Then below that it will only show the timesheet entries for the day highlighted. On opening it should default to the current day. For each entry it should give client name, time and the first 40 characters of the description. If you click on a time entry it should then bring the details into the form at the top.

Its not what I expected/wanted. Please can we remove the days of the week which go down the page and just leave the days of the week going across the page. Also resize the wording so it is smaller and so the 7 days of the week can fit in across the page. When I asked for hours I wanted them under the days of the week across the page. Then the selected day entries are shown twice, once under the days of the week across the page and then again below the days of the week. Please remove the ones under the days of the week across the page. Then keep the entries below that but make them so they can be highlighted and brought into the form when clicked. Also spread the entries across the page so each entry is just on a single line.

Its nearly there. The 7 days across the page still do not fit onto a single line, please can they be on 1 line. The entries below need headers, please use some formatting. Please can the entries be shown in table grid format with light grey lines for the table grid. They should have order client, description and finally time. Give each column a header, Client, Description and Time. They should spread across the width of the full box width. Client and description should be same size but time will be much smaller, only wide enough to fully se ethe heading and time entry. The time should be in the format 00:00 without seconds. When you click on an entry row please can you highlight it light green, it should still then put the details into the form above. Also on the form we need 2 buttons. Keep the one which says add entry but also add one which says update entry. So when you press add entry it adds a new one, when you press update it keeps the original line with any updates made.

Update Timesheet view

Hi! I'm still working on Cursor1 (the PHP practice portal with timesheet, clients, and role-based access). I'd like to make some changes to the timesheet view. For the row of the days of the week please can you have all 7 days of the week on the same line across the page. Do NOT allow any days to drop onto a new line below.

Ok thanks thats great. Now for the list of timesheet entries at the bottom of the page can we first make the width of the client column smaller and the description bigger. The client column needs to be 3/4 of its current size. Then for the description entry please only show the first 40 characters from the table.

That’s great thanks. Ok now I wanted to look at what happens when you click on a row in the table entries. The details go into the form correctly so that part works well. However, the update button does not work, it gives the message “No entry selected for update”. Please can you fix this so that the entry highlighted is updated.

Great that works. Ok now when a time entry is highlighted and the information from the line is in the form, please could you add an additional button alongside the “Update Entry” button on the same row called "+ Add Entry". When the add entry button is clicked it should add a new timesheet row with the information from the form.

My Job List

Hi! I'm working on Cursor1 (the PHP practice portal with timesheet, clients, and role-based access). I'd like to add a new page to be accessed from the practice portal page called “My Job List”. This would be in table format showing the jobs assigned to the person logged in. There would be tabs at the top of the page for “All” (showing all jobs assigned sorted by deadline date). For those with Basic login they would also see a tab for Prepare, Returned, other. If you’re a manager you see Prepare, Returned, Review, Other. If your admin you see Prepare, Returned, Review, With Client, Paid not approved, Approved not paid, Submit, C

ompleted, Other. All lists should be sorted by expected completion date.

My Job List

Hi! I'm working on Cursor1 (the PHP practice portal with timesheet, clients, and role-based access). I'd like to change the view of the My Job List page, only show the client, client id, task and description.

Sorry I would still like to show it in table format showing the jobs assigned to the person logged in. There would be tabs at the top of the page for “All” (showing all jobs assigned sorted by deadline date). For those with Basic login they would also see a tab for Prepare, Returned, other. If you’re a manager you see Prepare, Returned, Review, Other. If your admin you see Prepare, Review, With Client, Paid/Approved (being Paid not approved and approved not paid), Submit, Other. All lists should be sorted by expected completion date.

Questions for Tom

Say for clients table is it better to have primary key as the ClientRef or just keep the incremental number?

Update My Job List page view2

Hi! I'm working on Cursor1 (the PHP practice portal with timesheet, clients, and role-based access). I'd like to change the view of the My Job List page, only show the client, task and expected completion date (in format dd/mm/yy). For the header of the row expected completion just show the word “Completion”. When you click on a job row it should go to the form which was used to set up the job, on this form you would then be allowed to make changes to the job and there should be a button at the bottom to “Save changes”.

Ok thanks. When you click a job on my job list, it should go to the Job form and display the details from job you clicked on in my job list.

Update Practice portal

Hi! I'm working on Cursor1 (the PHP practice portal with timesheet, clients, and role-based access). I have made a manual change the view of the practice portal. The buttons for the forms are now above the portal statistics. On a mobile device there are gaps between all boxes except when they change from buttons to statistics. Please can you create a small gap, like all the other gaps between the last button box and the first statistics box.

Update Practice portal

Hi! I'm working on Cursor1 (the PHP practice portal with timesheet, clients, and role-based access). I would like to completely remove the page called services.

Update Practice portal

Hi! I'm working on Cursor1 (the PHP practice portal with timesheet, clients, and role-based access). I would like to make some changes to the “Jobs” page in practice management. I would like to add some tabs to the page, in the same way that there are tabs for the My jobs page but with different headings/reports. On all tabs it will show the jobs of that category listed by completion date, latest first, but in the job list it should only show details for "Client", "Task" and "Completion". The tabs should be as follows: “All jobs” which shows all jobs except for those which are completed or archived. “Received” which shows all jobs which have the state received. “Outstanding” which shows all jobs which have the state outstanding. Also like with the my jobs view the Jobs list should allow you to click on any particular job and it will take you to the “Edit Job” form.

Update Practice portal

Hi! I'm working on Cursor1 (the PHP practice portal with timesheet, clients, and role-based access). I would like to make some change. When you are in the “My jobs list” page and you click on a job it brings up the form for that job. At the top of the page there is a button which says “Back to Jobs” which then takes you to the “jobs” page. Instead I would like it to say “Back to My Jobs” and when pressed it will take you to the “My Jobs list”.

Update Practice portal

Hi! I'm working on Cursor1 (the PHP practice portal with timesheet, clients, and role-based access). I would like to make some changes to the “login” table. First I would like to call it “users” instead of “login” and change all references in the website to reflect that change.

Update Practice portal

Hi! I'm working on Cursor1 (the PHP practice portal with timesheet, clients, and role-based access). I would make a change to the login form to remove the section at the bottom which says “Don’t have an account” and the button “Set up new account”. Instead I would like to add new button to the practice portal page which is only available to administrator level which is called “Users” and has an icon which is the shape of a person which lists all current users with the columns Username, Password and Account type with data from the respective rows. At the top of the page, above the users and to the right it will have a green button which says “New user” and clicking that button takes you to the “register” form.

Thats great thanks. When in the page “user management” please can you allow any user to be clicked in which case it goes to the form for that user and allows you to make changes. The form name should change to Edit User and there should be a button at the bottom which allows you to save changes. There should also be a button to delete user. On the User management page you can remove the “Actions” column.

Update Practice portal

Hi! I'm working on Cursor1 (the PHP practice portal with timesheet, clients, and role-based access). On the "Timesheet" page please can you remove the word Timesheet which is below the header section and above the form. Also please can you remove the resulting blank space in that area so the forms start higher up the page.

Update Clients

Hi! I'm working on Cursor1 (the PHP practice portal with timesheet, clients, and role-based access). On the “clients” page please can only show the columns for name, reference and contact. Then allow the client row to be clickable which will then go to the form for that client and allows you to make changes. The form name should change to Edit User and there should be a button at the bottom which allows you to save changes. There should also be a button to delete user. At the top of the page above the list of clients there should be a search box which allows you to type in letters and as you type a letter the list of clients below reduces to only show the clients starting with the letters typed in the search box.

Update Clients

Hi! I'm working on Cursor1 (the PHP practice portal with timesheet, clients, and role-based access). On the “clients” form please can we add some new boxes and associated entries in the database. I would also like to include a box for Company Number (limited to 8 numbers), Authentication code (limited to 6 characters) and UTR number (limited to 10 numbers). I would like a dropdown box for “Partner” which chooses a username from the Users Table. I would also like 4 more dropdown boxes where the choice is Y or N (for yes or no) for “Year End Work”, “Payroll”, “Directors SA” and “VAT”. If you choose “Y” for VAT it should add a new box which is for “Periods”, and the choices should be “MJSD”, JAJO” and “FMAN”.

Update Clients

Hi! I'm working on Cursor1 (the PHP practice portal with timesheet, clients, and role-based access). On the “Jobs” list page please can you include a search box at the top of the page (like with the clients list page) which allows you to type in letters and as you type a letter the list of Jobs below reduces to only show the clients starting with the letters typed in the search box for the jobs currently in the viewer.

Update Contact repsponse

Hi! I'm working on Cursor1 (the PHP practice portal with timesheet, clients, and role-based access). Please can we rename the page “admin” to “cfresponse”.

Update Import Tool

Hi! I'm working on Cursor1 (the PHP practice portal with timesheet, clients, and role-based access). I would like to add a new button on the settings page called import data. This will then take you to a new page called "import". There will be a box which says "Table to import" which has a dropdown box. At this stage it will just include clients and jobs. Below that there will be a button which says "Choose File". On pressing this it will open up an explorer which allows you to search on your local directories to find a suitable file. The file will be a .csv type and include all the columns of the table being imported, and be designed to be directly imported into either the "clients" table or the "jobs" table. If you could also add a template .csv file for both the clients table and jobs table import which can be clicked and the appropriate file is saved to the users downloads. Once the file has been chosen the explorer will disappear and the name of the file will appear on the screen below the choose file box. Below that there will be another button which says “Import”. On pressing this it will take the data from the csv file and append the rows of data to the correct table, not including the header row of the .csv file. If all rows are successfully imported a message will appear below the import button saying how many rows have been successfully imported. If any rows cannot be imported there will be a message appear below the import button to say how many rows have been successfully imported and how many rows have been rejected. It will also list row reference number for each row rejected.

Update Import Tool

Hi! I'm working on Cursor1 (the PHP practice portal with timesheet, clients, and role-based access). On the jobs list I would like to add some functionality to send reminders for outstanding information. Please can you add a small tick/checkbox on the left side of every column in the Jobs view filtered by state “Outstanding”. If any checkboxes are ticked a button should appear above the “Client” heading which says “Send reminder”. When clicked the system will prepare an email addressed to the email address in the “client” table row “email”. The heading for the email should be “Information needed for Accounts for the year ended [Insert from jobs table column deadline\_date]. The wording of the email should be “Dear [insert from clients table column contact] (new paragraph)Please can you send the data for the accounts as soon as possible”. (new paragraph) Kind regards (new Paragraph) Rob

Update Clients form and table

Hi! I'm working on Cursor1 (the PHP practice portal with timesheet, clients, and role-based access). On the clients form and table I would like to change the Contact person (contact in the clients table) to Contact Forename (contact\_forename in the table). I would also like to add a new entry in the form after Contact Forename called “Contact Surname” and this will add a new table column in the clients table between Contact\_forename and email called contact\_surname. Please also update the clients import tool and download template to reflect these changes.

Update Email

Hi! I'm working on Cursor1 (the PHP practice portal with timesheet, clients, and role-based access). On the jobs list I would like to add some functionality. For the email reminder please can you change the header to say “Information needed for Accounts for the Period Ended [use the date from clients table column period\_end]” Then for the body of the email instead of saying “Dear….” In the first line, please can you change this to Hi [use from clients table entry in contact\_forename]

Update Tasks

Hi! I'm working on Cursor1 (the PHP practice portal with timesheet, clients, and role-based access). On the Tasks form please can you add a new box below Task name and above Description called Task Order. This will allow you to put in a number. The number will be added as a new column in the Tasks table after task\_name and before description. The number will be used to set the order sequence of the tasks in the tasks list and on the dropdown in the jobs form.

Update Email

Hi! I'm working on Cursor1 (the PHP practice portal with timesheet, clients, and role-based access). On the Settings page I would like to add a new button which goes after Users and before Import Data which is called “Emails”. It will then go to a new page called Emails which will allow you to design the email layout for the Email reminder we have already set up. I should note that the email we have set up on the outstanding page should be specifically for jobs with the task “Year End”. On the Emails page at the top there should be a drop down menu which chooses the task\_name relating to the job. There should be 3 options, Year End, VAT returns and a third option which is “Other default” which covers all email types not specified at this stage. On entering the page the dropdown will be set to year end. Below the dropdown the email relating to the task will be set out in an editable version. This means that if you make changes to the wording in the header or the main body of the email it will be changes in the actual email which is sent to clients via the outstanding job list. At this stage all 3 email options will have the same wording but all 3 will be editable. Therefore when you tick a job from the outstanding list it will use the Task field to choose which email template to use.

Update email templates

Ok great. I would like to change the names of the current email templates being used from "Year End" to "Year End - Instant" and "VAT returns" to "VAT returns - Instant". I would also like to add some new templates called “Year End - Early”, Year End - Late”, “VAT returns - Early” and “VAT returns - Late”. They can have all the same wording as the original email. I would also like to change the name at the bottom of the email to be replaced by a placeholder taking user\_forename from the user table.

Update Users

Hi! I'm working on Cursor1 (the PHP practice portal with timesheet, clients, and role-based access). On user form I would like to add 4 new boxes after password, the first being Forename which adds a column to the users table after Account Type called user\_forename then a second being Surname which adds a column to the users table after user\_forename called user\_surname. Then a third after user\_surname called Internal Name which which adds a column to the users table after user\_surname called user\_internal. Then a fourth after Internal Name called Email Name which which adds a column to the users table after user\_internal called user\_email.