Contents

INSTALLING QUICKMANAGER

To install **quick**manager you must upload your copy of **quick**manager to your server. Once uploaded and unzipped navigate to the following folder:

quickmanager/installer/index.php

Have the following information ready with you:

DATABASE HOST NAME (usually localhost)
DATABASE NAME (must already exist on your database server)
DATABASE USERNAME
DATABASE PASSWORD (can be blank)

Click install

Once you have successfully installed the app navigate your browser to

quickmanager/index/index.php

Here you can access additional options under the “settings” panel.

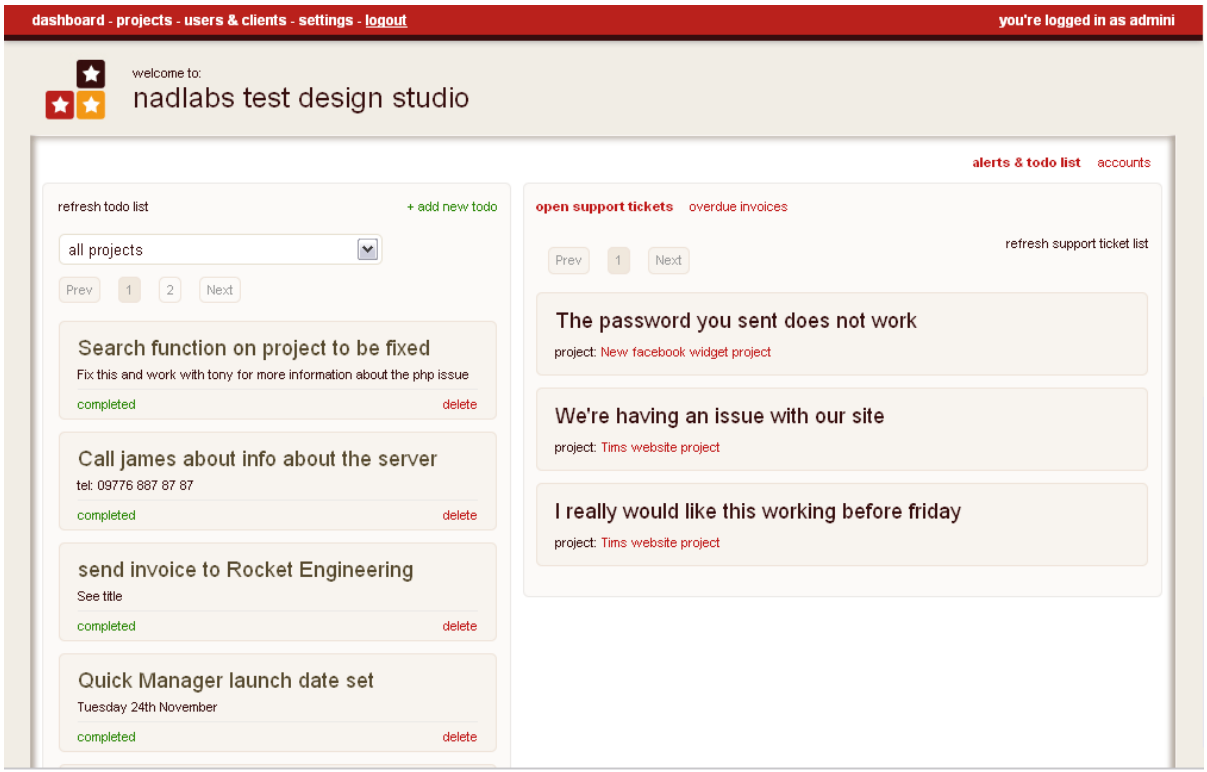
This documentation will give you an overview of all the features and how to use them.

For more detailed annotated screenshots please see appendix (a) at the end of this document.

YOUR DASHBOARD

When you login you will see your dashboard panel. This contains two distinct areas.

1. The client alerts & to-do list area
2. The invoices & accounts area



[Fig1] – the **quick**manager dashboard

For larger versions of these screenshots see the "*help/images*" folder

YOUR TO-DO LIST

To add a new to-do task by clicking the 'add new to-do' link. You can select a project to connect to-do task to. These tasks are general purposes tasks and are not the same as "project tasks" described later in the document.

Completing a task removes it from the list. Deleting a task will remove it from the system completely.

CLIENT ALERTS

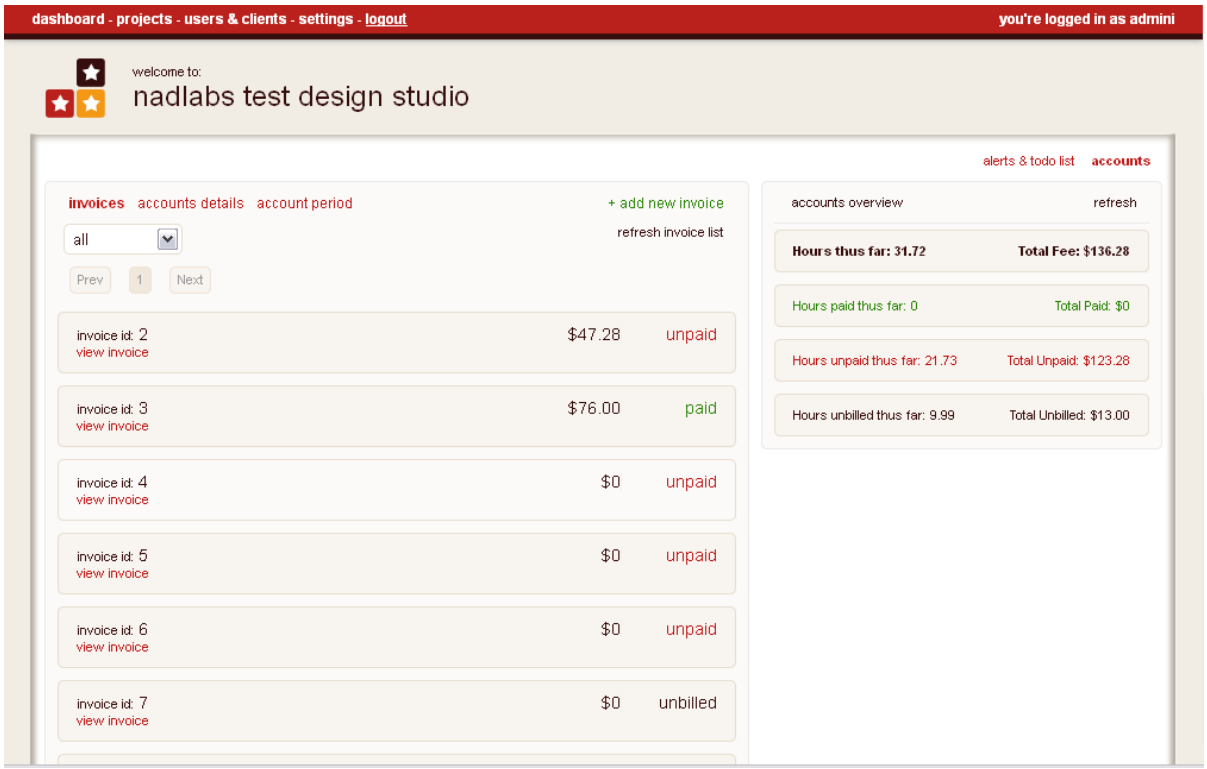
This area shows you two distinct client related alerts. The first is **open support tickets**. An open support ticket is defined as one which the clients have started or responded to but you, the site administrator/owner, have not responded to.

Once you post your response it will be marked as 'closed' and will not appear in this list. Once the client responds it will be marked as open again etc.

You can click on the tickets title to launch the related project and load the support ticket in full.

Note: all tickets and responses to tickets will cause an email to be sent by the system. If a ticket is started or responded to by the client, the site admin will get an email. If you, the administrator, responds then the client user who started the ticket will get an email notifying them of the response.

This area also shows **overdue invoices**. An overdue invoice is worked out from the sent date plus the number of days you have allowed for the client to pay the invoice. This is also known as 'due in x days' in parts of this document.



[Fig2] - the invoice & accounts area

INVOICE AREA

The invoice area allows you to manage your client invoices. This includes creating new invoices, adding and editing tasks (billable items) to the invoice as well as **producing a PDF version of the invoice.**

To create a new invoice select “add new invoice” (all add/save related links are in green). Once you have entered all the correct information [see fig2.1 in the *help/images* folder] then click save. You can edit the “due in x days” value later.

To add new billable items to the invoice go back to the main invoice area [select the red invoices link] and then refresh the list. The new invoice will be appended to the end of the list.

Note: this may not be on the first page of results.

Once you have found your invoice select “view invoice”. Select “edit invoice” to change the status of the invoice (whether it’s been paid, sent or unsent) and you can add items to the invoice.

Items are “project tasks” from the projects of client you have created this invoice for. You can only add an item or “project task” to one invoice. You can create “project tasks” in the project dashboard.

Removing an item is simple as clicking remove on the item that you wish to remove. You may need to click ‘refresh item’ to get it to reappear in the list of available “project tasks” after it has been removed from the invoice.

When is the invoice due?

The due date is worked out from the sent date (this is set when you mark the status as “sent”) plus the number of days you have allowed for the client to pay the invoice.

These details will appear in the PDF version of the invoice.

Note: your client can only see paid and sent invoices in their dashboard. They cannot see unsent invoices.

You can create a PDF version of the invoice by selecting the green “view as PDF” link. You can edit the details, such as company name, address etc, on the PDF invoice by going to the “settings” panel [see links the red menu up top of the main screen].

If you require further customisation of the of the pdf invoice you can edit the following files:

quickmanager/templates/get_invoices_pdf.php
quickmanager/templates/get_invoices_tasks_pdf.php

note:

1. not all regular css rules can be applied through the pdf generator
2. do not remove the place-holder tags (those surrounded with hash symbols)

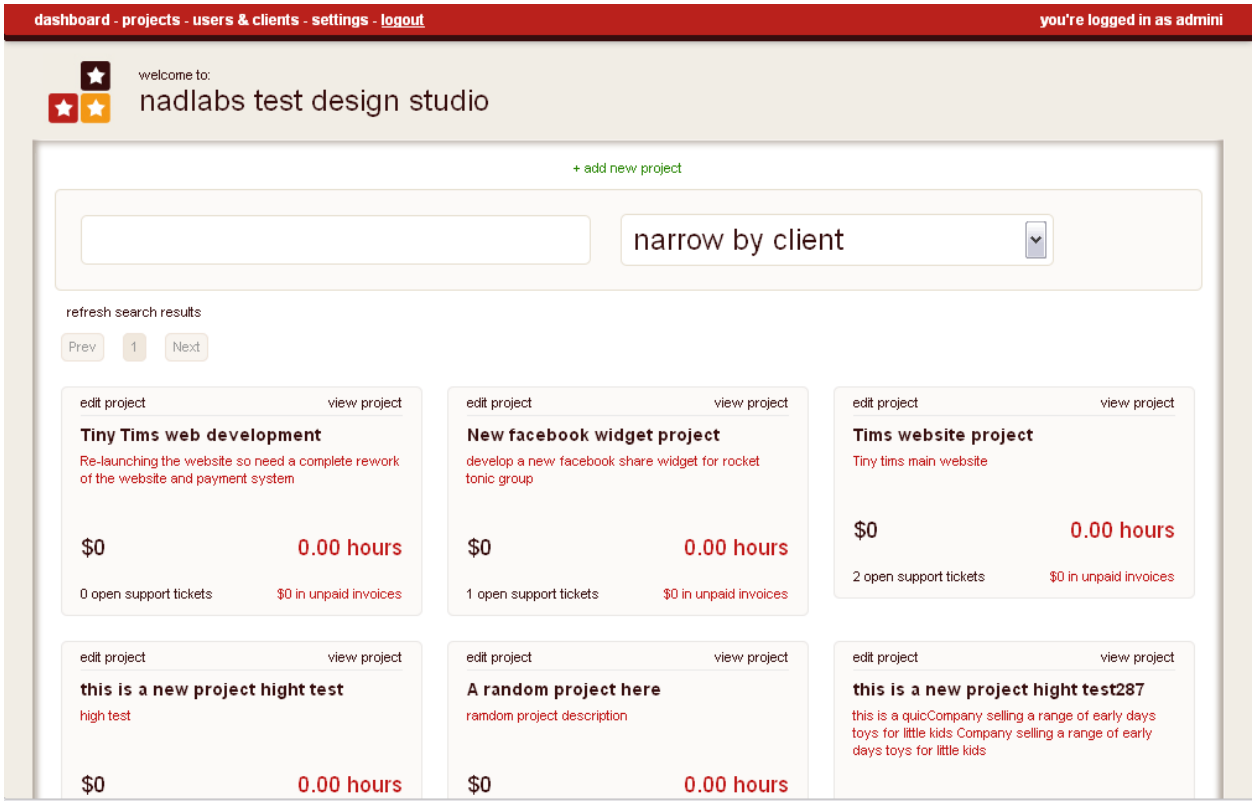
ACCOUNTS AREA

The accounts area allows you to view all expenses and incomings (billable tasks). You can narrow by client or project to give you a full overview of the cash flows for each area of your business.

You can also set the **account period**. By setting the account period you can restrict the details shown to you. This will affect all data including invoices, accounts and the accounts overview.

Note: the system is designed to allow you to independently refresh data in various areas

PROJECT DASHBOARD



[Fig3] – project dashboard and search area

Your project home panel or “project dashboard” is where you spend most of your time. When you enter this panel you will meet the project search area.

Enter the project title or a part of it into the search box or simply use the client drop down to narrow your projects.

To **edit a project** simply select “edit project” on the results box of your chosen project. To **add a new project** click the ‘add new project’ link at the top of the screen to display the “add new project area”.

Note: clients can see project titles and descriptions.

Attaching a user to the project

When adding a new project you can also attach users (contractors/employees) to the project. To do this add a new project, refresh the list of the search results (new projects always display first) and select “edit project”. You will see an option to add/attach users.

They, the attached user, will only see the project in their dashboard if they are attached to it here. **You can remove them at any point from the project under the “edit project” area.**

Note: Administrator users can see all projects by default.

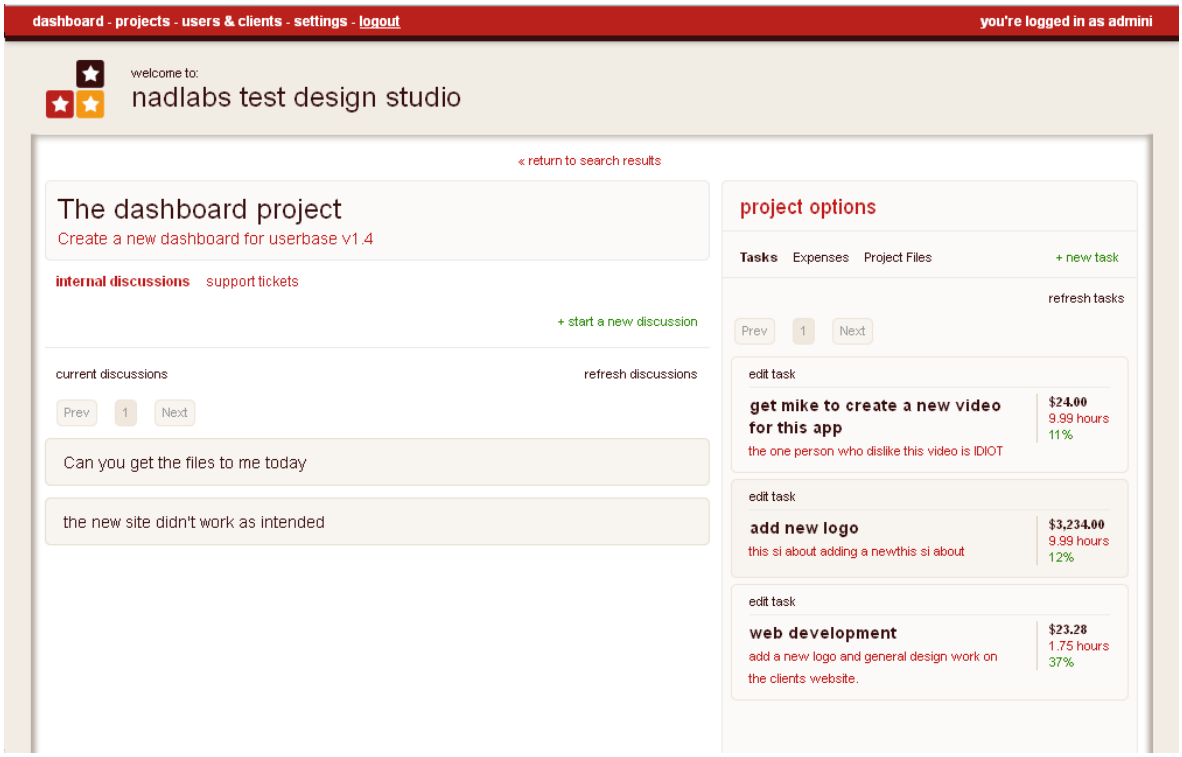
You can return to the results at any time by selecting “back to search results”.

Search results show you a quick view of the project including:

1. The total time spent.
2. The revenue from the project.
3. The number of open support tickets.
4. The number of overdue invoices.

Project Details

Select “view project” to load the project and view all the details.



[Fig4] – loading the project details

Main project details area:

Once the project details area is loaded you will gain access to the following areas:

internal discussions: those between you and your contractors/employees – not seen by the client.

support tickets: only your clients can start these and are only seen by you, the owner, and your clients. Your contractors do not see these.

To load either the internal discussion or support ticket, simply click on the title of discussion/ticket in the corresponding results list.

Discussion and ticket comments support hyper links and line breaks.

Note: responding to a support ticket will send an email to the client user who started the support ticket.

PROJECT OPTIONS BAR:

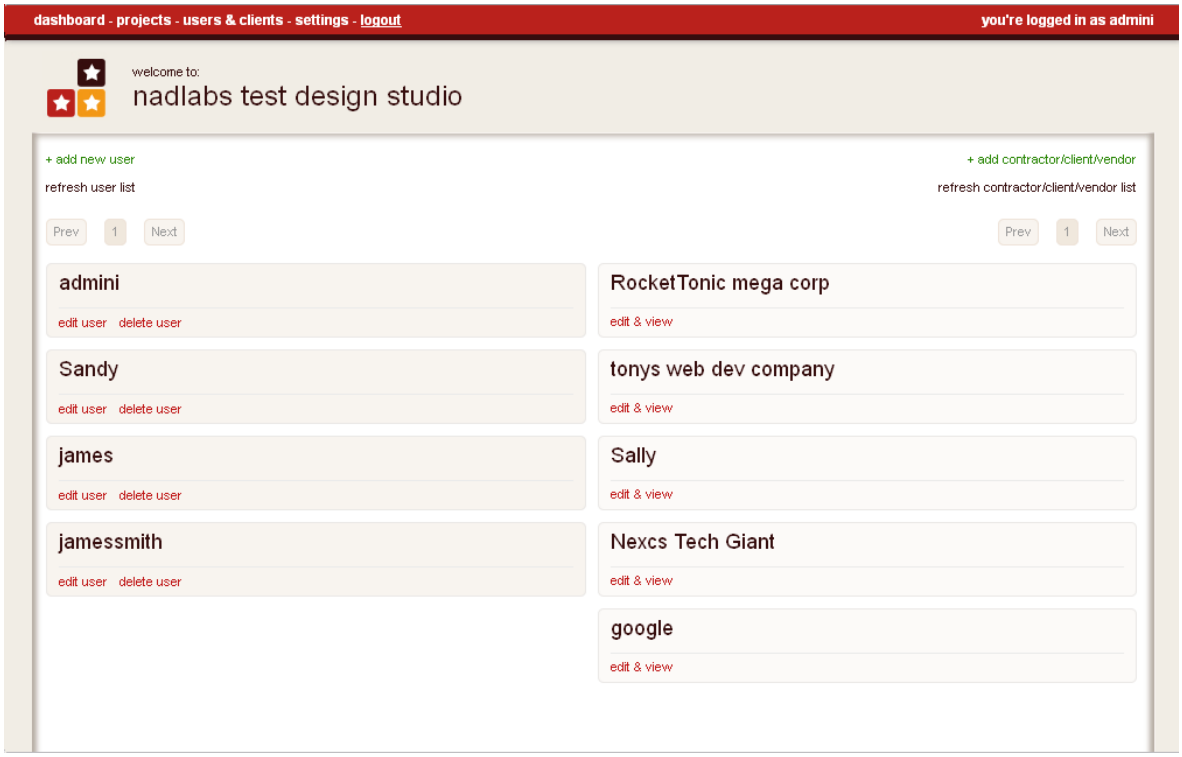
On the right hand side you have the project options. These allow you to add **tasks** (those that can appear on your invoices), **expenses** (to appear in the accounts area) and you can **upload files** for the project.

Tasks: These allow you to track hours/costs of the individual elements of the project. Keep in mind the title and description of the tasks will show on the invoice you send to your client.

Expenses: These appear in your accounts area. You can connect an expense to a “vendor” to allow you to number crunch your data if required. For example you can add stock photo vendors to the system and mark off expenses against these vendors. Create vendors in the same way you create clients organisations (see **users & organisations**)

Files: As an owner you can upload files that are either internal only (only seen by you and contractors attached to this project) or client only (not seen by your contractors). This is to help prevent accidental/malicious disclosure between parties.

USERS & ORGANISATIONS



[Fig5] – user and organisation lists

Select the “users & clients” option in the top menu bar to view, edit and add new users and organisations.

Users can be attached to organisations (such as people working for one client organisation).

Note: attaching a user to a client organisation will allow them to see that clients projects **and invoices.**

Note: Administrator users have access to all projects, invoices and **system settings.**

SETTINGS

All settings can be changed under the “settings” panel. This includes database connections, pdf settings and general **quick**manager system settings.

Note: the company name will appear on the pdf version of the invoices and on screen in the **quick**manager dashboard itself.

This is for clients and contractors as well as yourself.

APPENIX (A) – DETAILED SCREENSHOTS

Annotated screenshots – use these images along side the user guide to gain a quicker understanding of how all the features in **quick**manager work.

area description	images
quickmanager main dashboard: this image will give you an overview of the features available on the main dashboard. Please referrer to pages 1-3 in the userguide.pdf document for more details on these features	Dashboard overview
quickmanager invoices area: these images image will give you an overview of the invoice area of the dashboard. Please referrer to pages 3-4 in the user guide for more details on these features	Invoice overview Add invoice Edit invoice View invoice
quickmanager accounts area: this image will give you an overview of the accounts area of the dashboard. Please referrer to pages 3-4 in the user guide for more details on these features	Accounts overview
Quickmanager project dashboard: these images will give you an overview of the project related tasks and functions. Please referrer to pages 4-5 in the user guide for more details on these features.	Project search Add project Edit project Attach users to a project Project details 1 (general) Project details 2 (support tickets)

If the links above do not work please see the *help/detailed_screeshots* folder for the images.