

# PFBilling For Projectfork

Turn your PF Timesheet entries into PDF Invoices.

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## ABSTRACT

PFBilling for Projectfork is a Joomla 3.x administrator component that provides the ability to generate PDF invoices from Projectfork timesheets entries.

<b>OVERVIEW .....</b>	<b>3</b>
<b>PFBILLING FOR PROJECTFORK COMPONENT .....</b>	<b>3</b>
PACKAGE INSTALLATION .....	3
COMPONENT CONFIGURATION SCREEN .....	4
CREATING YOUR FIRST INVOICE .....	6
<i>The invoice edit screen</i> .....	7
CREATING PDF INVOICE TEMPLATES.....	9
<b>COMPONENT RELEASE NOTES .....</b>	<b>11</b>
VERSION 1.0.0 – INITIAL RELEASE .....	11
<b>COMPONENT ROAD MAP .....</b>	<b>11</b>

## Overview

The PF4 Billing & Invoicing administrator component provides a means of generating PDF invoices from your Projectfork timesheet entries.

## PFBilling for Projectfork Component

### Package Installation

The entire package is approximately 6Mb in size. By default, the maximum upload filesize for php is set at 2Mb. Please make sure that your php installation can handle uploading files greater than 4Mb.

A simple way to check is to create a php file with the following content:

```
<?php
    phpinfo();
?>
```

Save the file, upload it to your webserver and then proceed to view this page from your browser. Search for the following:

- upload\_max\_filesize
- post\_max\_size

and ensure they are set to values greater than 4Mb. Once you have verified these settings delete the file from your webserver.

If you need to adjust these values locate your php.ini file and make the necessary changes. If you are unable to locate your php.ini file ask your hosting provider for advice.

Your purchase contains a file called “com\_pfbilling\_for\_projectfork.zip”. This is the installable Joomla package. Simply install this package the same way you would install any other Joomla package.

## Component Configuration Screen

Once the component has been installed you will notice 2 new navigation options. The first is the standard top level component menu as shown in figure 1 and the second is the addition of a link in Projectfork's sidebar menu to the PFBilling for Projectfork component as illustrated in figure 2.

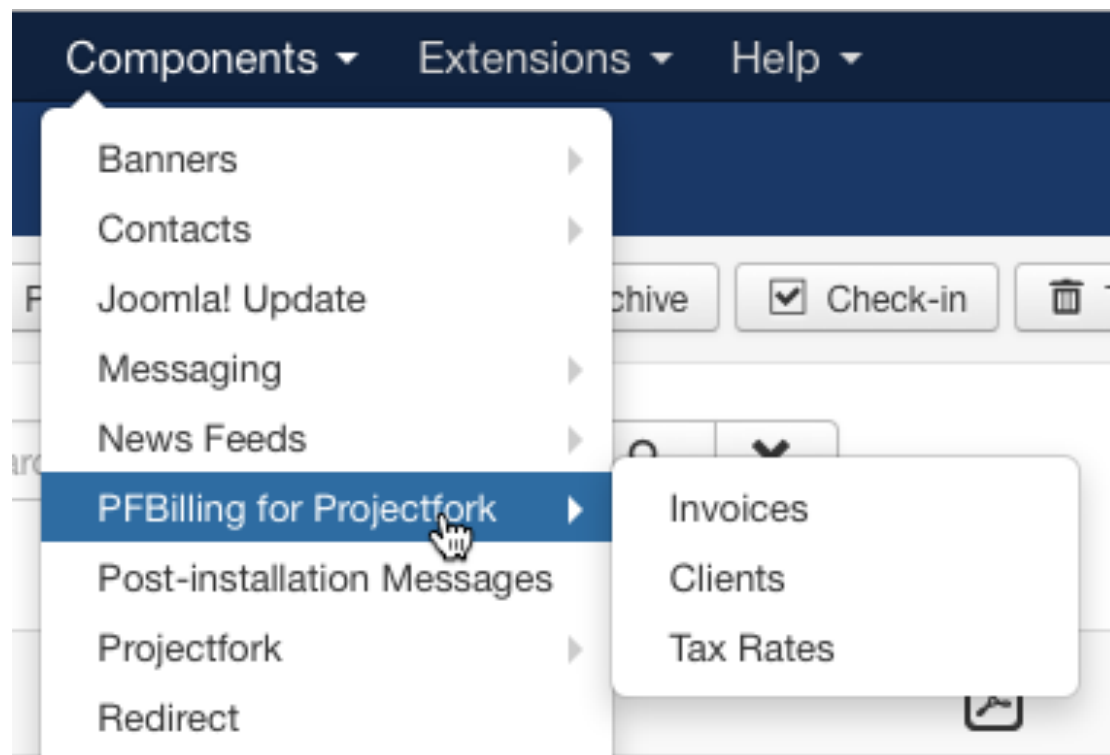


Figure 1 - component menu

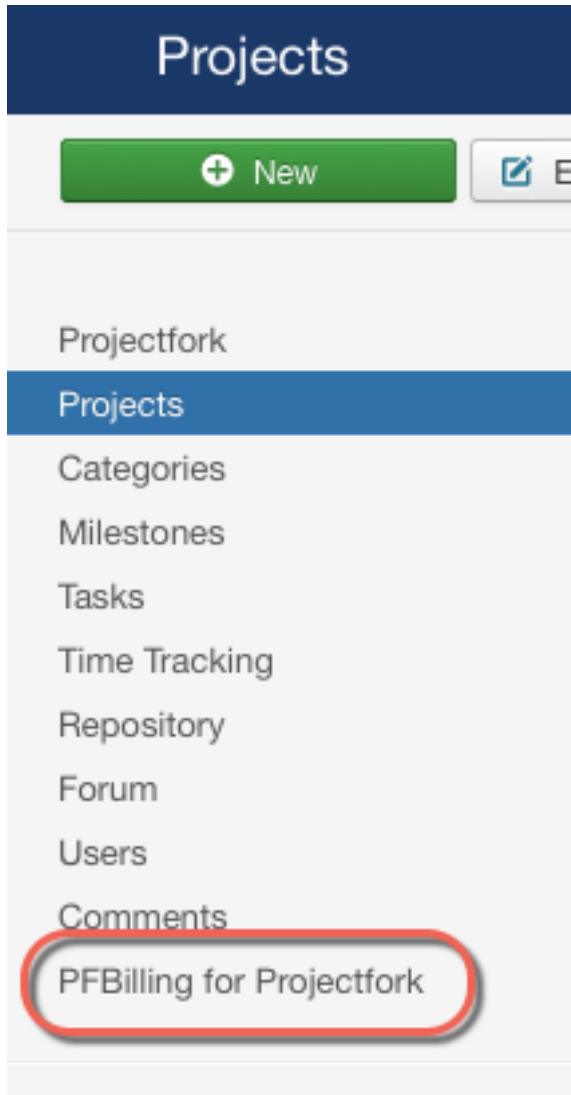


Figure 2 - Component Sidebar Menu

Navigate to the PFBilling for Projectfork component and proceed to its configuration screen by clicking the “options” button in the top right hand corner of your screen as illustrated in figure 3 below.

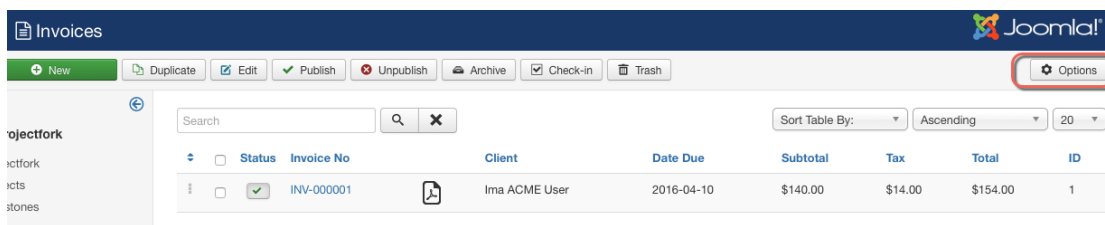


Figure 3 - Configure Component

The options screen as illustrated in figure 4 below consists of the following tabs:

- **PFBilling for Projectfork** – defines the currency formatting options. Either set your own or click the “Use Projectfork Settings” button to populate these options with your PF equivalent values.
- **Invoices** – defines the default invoice options and allows you to set up your company information that will appear on your invoices.
- **Taxes** – provides you with the ability to configure tax rates.

For further explanation of each of the fields found within the 3 tabs please hover over the field labels.

Figure 4 - Configuration Options

## Creating your first invoice

Before creating your first invoice ensure you have configured the component as outlined in the previous section.

To successfully create your first invoice you need to ensure your clients and taxes have been set up. Clients must be created prior to creating

your first invoice. Without clients you will not be able to successfully save a newly created invoice. Tax rates however do not need to be created if you do not intend on charging tax on your invoices.

### The invoice edit screen

From the invoice create/edit screen select the client that is to receive the invoice from the “Select Client” drop down list under the “Client Information” section.

Invoice numbers are generated automatically. Invoices start at 1 and are incremented sequentially. The value displayed in the Invoice Number field is a combination of the invoice prefix (you would have configured this in the components’ options) and the automatic number.

The invoice number can be overwritten if you so desire.

The invoice’s “date Created” field defaults to the current date and can be overwritten.

The invoices’ “date due” field defaults to x days from the current date. The amount of days that are added to the invoices’ “date created” field depends on the value you have entered for “Invoice Due After (Days)” configuration option. This can be overwritten on a per invoice basis.

The template dropdown field allows you to select the invoice template that will be used to generate the pdf invoice. By default, there is only one pdf template available.

Additional templates can be installed. Refer to the “Creating PDF Invoice Templates” section for further information.

To populate the invoice with timesheet entries, simply select the appropriate project from the “Select Project” dropdown list and click the “Add All” button.

You can delete or edit individual items as you see fit. Doing so will not delete or edit those items within the relevant Projectfork sections.

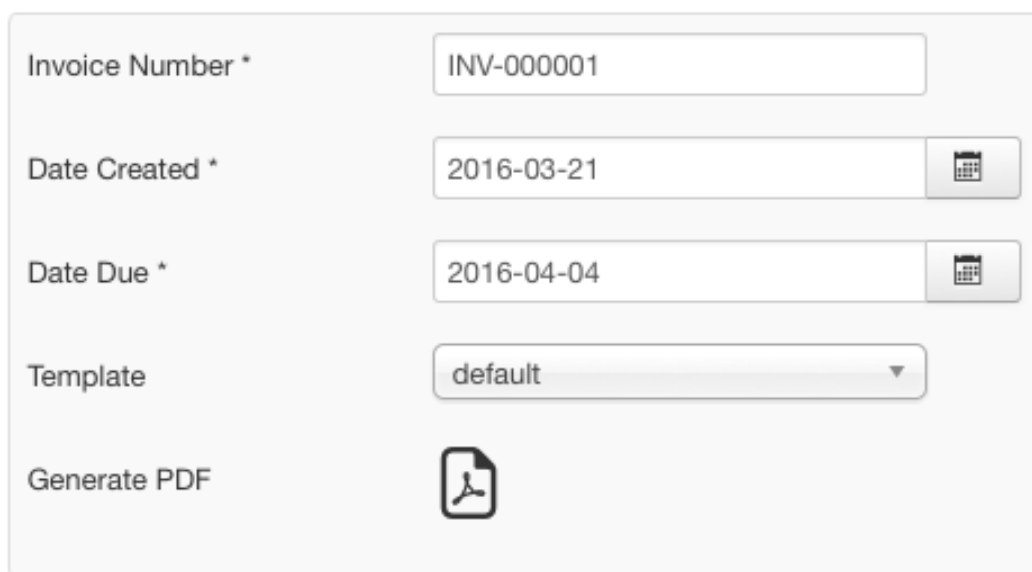
You also have the ability to enter new items not related to any task time entry. To do so, simply click the “Add New Item” button and enter the relevant information.

Finally, items can be reordered through drag and drop.

If you had configured default Invoice terms they will appear in the “Invoice Terms” editor. Invoice terms can be overwritten on a per invoice basis.

If you would like to also include notes to the client, simply enter the relevant information in the “Invoice Notes” editor field.

Once the invoice has been saved you can generate an invoice by clicking the pdf icon that now appears in the invoice edit screen as shown in figure 5 below



Invoice Number \* INV-000001

Date Created \* 2016-03-21

Date Due \* 2016-04-04

Template default


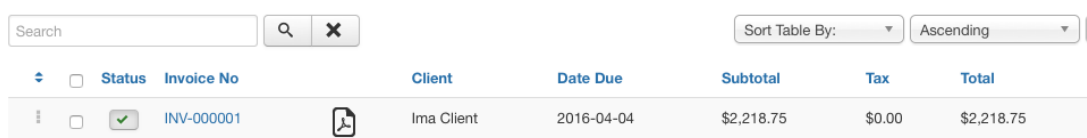
Generate PDF 

Figure 5 - Generate PDF Invoice

or the pdf icon that appears in the invoices list view as shown in figure 6 below.




	Status	Invoice No	Client	Date Due	Subtotal	Tax	Total
	<input checked="" type="checkbox"/>	INV-000001	Ima Client	2016-04-04	\$2,218.75	\$0.00	\$2,218.75

Figure 6 - PDF icon on Invoices List View



## Creating PDF Invoice Templates

The component comes with a default PDF invoice template. PDF invoice templates are stored in `administrator/components/com_pfbilling_for_projectfork/assets/invoices` directory.


The component utilises the `dompdf` (<https://github.com/dompdf/dompdf>) library to generate the PDF invoices.



DOMPDF is basically a HTML to PDF converter. If you have HTML and PHP knowledge you should be capable of creating your own PDF invoice templates.

To create your own invoice template simply begin by copying the existing default template (called `default.php`) and saving the file with a new name in the same directory.

Take a look at figure 7. Each of the configurable sections have been numbered. Now open the file you just copied. You will find comments in the code that correspond to each of these sections to help you build your own invoice templates.

If creating your own pdf invoice templates is beyond your ability we are happy to create them for you for a small fee.

**Tax Invoice** 





**Ornamentum Pty Ltd**


404 Centre Rd  
Bentleigh, Victoria 3204

+61 3 9999 9999  
xxx@xxx.com


ABN: 1234-5556-333333



**Bill To:**  
ACME Pty Ltd  
Ima Client  
404 XXXX Rd  
Bentleigh, Victoria 3204




**Invoice No:** INV-000001  
**Invoice Date:** 2016-03-21  
**Invoice Date Due:** 2016-04-04



Item Name	Description	Unit Price	Quantity	Subtotal
Task One	ist day's work on Task One	\$125.00	8	\$1,000.00
<b>Items Total</b>				\$1,000.00
<b>Tax</b>				\$100.00
<b>Total</b>				<b>\$1,100.00</b>

Please make all payments to:

**Account Name:** Ornamentum  
**BSB:** XXX-XXX  
**Account No:** XXXXXX-XXXXXX



here are the notes to the client




Figure 7 - PDF Invoice Templates

## Component Release Notes

### Version 1.0.0 – initial release

The initial release consists of a component that can only be accessed from the administrator section of your Joomla site.

### Component Road Map

- Create the ability to generate quotes from PF task time estimates – Version 1.1.0
- Introduce ability to email invoices and quotes directly from component – Version 1.1.0
  
- Create component dashboard – Version 1.2.0
- Create Reporting section – Version 1.2.0
  
- Introduce front-end access to component – Version 1.3.0
- Create Payment and Payment methods – Version 1.3.0