

Sliced Invoices Annual Schedule Extension Instructions v1.9.7

Download full featured version at: <https://theabidins.com/plugins/si-extensions/>

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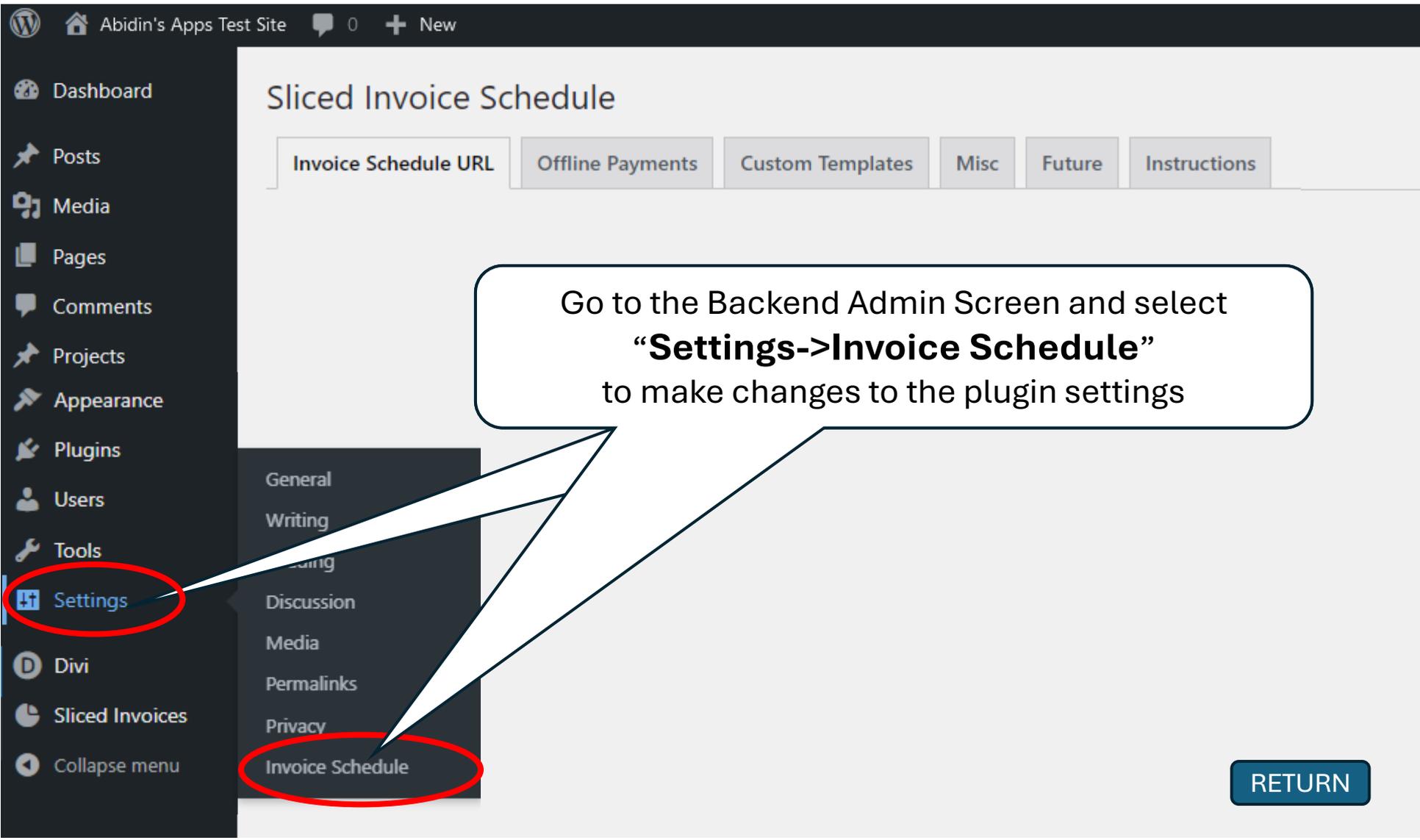
Table of Contents

- Installation
 - Upload and activate as you would any WordPress Plugin.
- [Setup](#)
- Admin Screens
 - Backend Navigation: Settings->Invoice Schedule
 - Plugin Schedule URL

Setup

- Upon activation, the Sliced Invoice Annual Schedule extension plugin:
 - Creates an annual calendar view of invoices and quotes by month for each calendar year that has quotes and invoices.
 - Creates the page to display the Annual Schedule on the frontend (although, editor or admin must be logged in).
 - ✓ The page title is 'Sliced Invoice Annual Schedule'.
 - ✓ The post_name is 'sliced-invoice-annual-schedule'.
 - ✓ Schedule Display URL: <yourDomainName.com>/sliced-invoice-annual-schedule
 - ✓ The shortcode is [aa_sliced_invoice_schedule]
 - The current version requires the admin to remove sidebar or use a blank template for the schedule page. Later version will do that automatically.
- This extension does not modify any Sliced Invoices data. It simply collects the data and displays it.
- An administrator or editor must be logged in to view the schedule.

Backend Navigation: Settings->Invoice Schedule



Admin Plugin Schedule URL

The plugin will automatically create the schedule page and create the permalink.

If you are semi-experienced with WordPress backend, you can change this to another page on your site, BUT, make sure the other page has the schedule shortcode, [aa_sliced_invoice_schedule], in its post_content.

***** NOTE: Future updates will not change your existing settings. *****

Try it: <http://localhost/abidinsapps/sliced-invoice-annual-schedule>

Admin Plugin Schedule URL

The screenshot shows the WordPress admin interface for 'Abidin's Apps Test Site'. The left sidebar contains navigation links for Dashboard, Posts, Media, Pages, Comments, Projects, Quotes, Invoices, Products, Profile, Tools, and Settings. The main content area is titled 'Sliced Invoice Schedule' and has several tabs: 'Invoice Schedule URL', 'Offline Payments', 'Custom Templates', 'Misc', 'Future', and 'Instructions'. The 'Invoice Schedule URL' tab is active.

The page content includes the following text:

Sliced Invoice Schedule

The Active path to the Invoice/Quote Schedule.

The system uses the path below as the "official" one and it is used for navigation within the plugin

This URL is valid and this URL has the following path

Try it: <http://localhost/abidinsapps/sliced-invoice/>

<http://localhost/abidinsapps/sliced-invoice/>

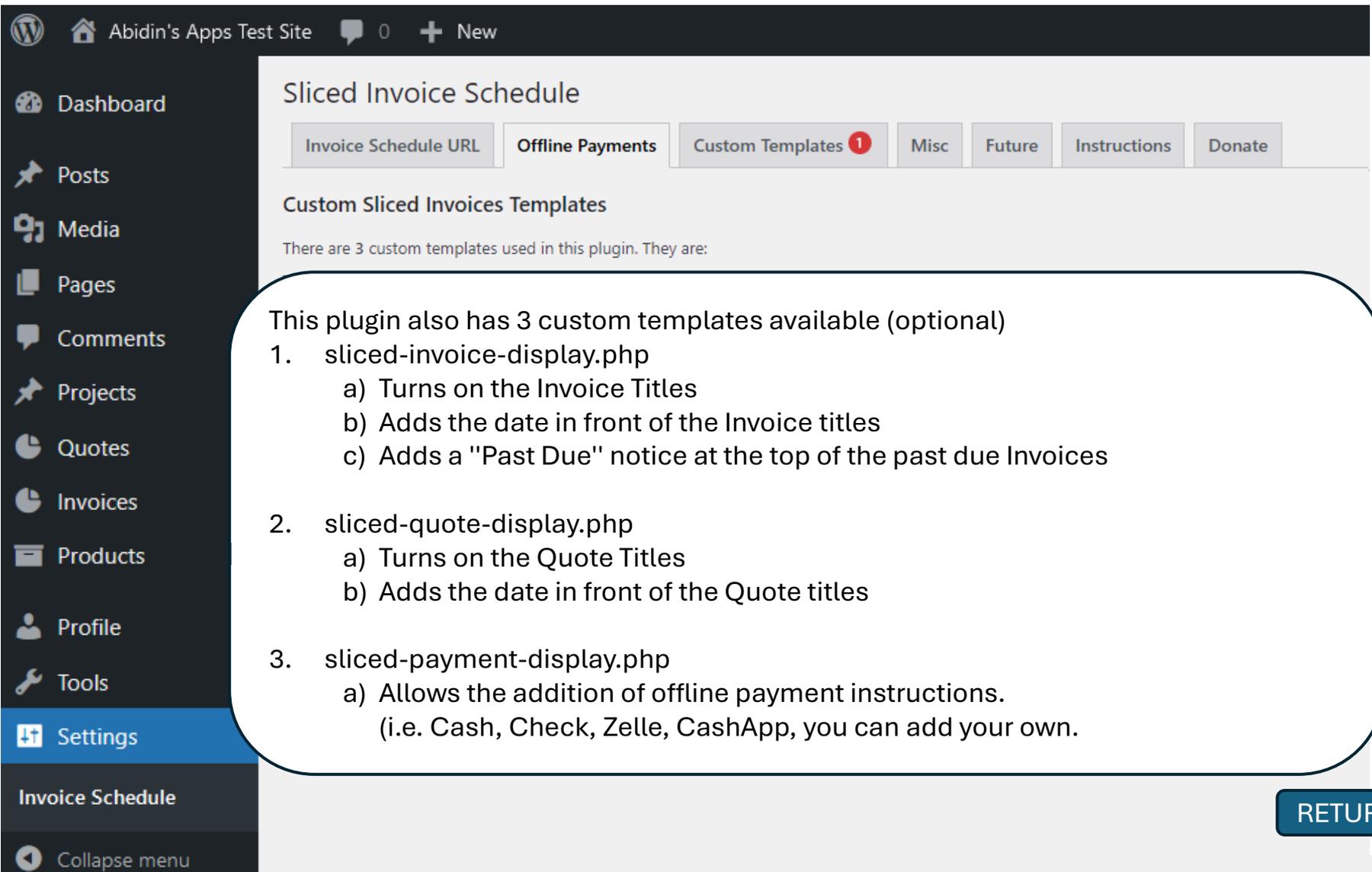
Information below is provided to assist in cleaning house if multiple Schedules exist within the site.

2 Schedule(s) exist(s) in the Trash.
[Click here to see your pages in the Trash.](#)

2 Active Schedule(s) exist(s) in the the system:
 The 'Official' one above is in the form field and the one(s) below is/are NOT official.
 - [Click here to see the schedule page, entitled 'Another Schedule' \(slug = another-schedule\).](#)

Below is just an alert to let the admin/editor know if there are duplicate schedules and if they are active schedule pages or some exist in the trash.

Admin Custom Templates (Optional)



The screenshot shows the WordPress admin interface for 'Abidin's Apps Test Site'. The left sidebar contains navigation links: Dashboard, Posts, Media, Pages, Comments, Projects, Quotes, Invoices, Products, Profile, Tools, Settings, Invoice Schedule, and Collapse menu. The main content area is titled 'Sliced Invoice Schedule' and features several tabs: Invoice Schedule URL, Offline Payments, Custom Templates (with a red notification icon), Misc, Future, Instructions, and Donate. The 'Custom Sliced Invoices Templates' section states: 'There are 3 custom templates used in this plugin. They are:'. A callout box provides details on these templates.

This plugin also has 3 custom templates available (optional)

1. sliced-invoice-display.php
 - a) Turns on the Invoice Titles
 - b) Adds the date in front of the Invoice titles
 - c) Adds a "Past Due" notice at the top of the past due Invoices
2. sliced-quote-display.php
 - a) Turns on the Quote Titles
 - b) Adds the date in front of the Quote titles
3. sliced-payment-display.php
 - a) Allows the addition of offline payment instructions.
(i.e. Cash, Check, Zelle, CashApp, you can add your own.

[RETURN](#)

Admin Custom Templates

Abidin's Apps Test Site 0 + New UpdraftPlus

Sliced Invoice Schedule v1.9.6

Invoice Schedule URL Custom Templates

Custom Sliced Invoices Templates

There are 3 recommended custom templates provided by this plugin. Those templates:

1. Turns on the Invoice & Quote Titles
2. Adds the date in front of the Invoice & Quote titles
3. Adds a "Past Due" notice at the top of the past due Invoices
4. Allows the addition of offline payment instructions.

Check this box to enable this plugin to help you manage the custom templates.

Switch Custom Template Management On/Off

You do not have to turn on these custom templates in order for the Schedule Calendar to work. These are additional features. (I am thinking about removing this feature and creating a separate plugin to reduce confusion)

Do NOT check this box if someone has added or edited custom templates in the Theme folder! This will OVERWRITE any modification in the Theme's Sliced Invoices template files.

If you want the customizations outlined on the previous page, check the box pointed-to above and click "Switch Custom Template Management On/Off".

Do not click the box if someone has done any customizations to the Sliced Invoice templates. Any previous template customizations will be deleted and replaced with these.

To disable the custom SI templates, uncheck the checkbox and click "Switch Custom Template Management On/Off".

RETURN

Admin Custom Templates

Once Custom Template Management has been turned on, you will see this screen.
Click "Add this Custom Template to your theme" for each custom template you want to add.

Abidin's Apps Test Site 0 New UpdraftPlus

- Dashboard
- Posts
- Media
- Pages
- Comments
- Projects
- Quotes
- Invoices
- Appearance
- Plugins
- Users
- Tools
- Settings 1
- General

Sliced Invoice Schedule

- Invoice Schedule URL
- Offline Payments
- Custom Templates 1**
- Misc
- Future
- Instructions
- Donate

Check this box to enable this plugin to help you manage the custom templates.

Switch Custom Template Management On/Off

**Do NOT check this box if someone has added or edited custom templates in the Theme folder!
This will OVERWRITE any modification in the Theme's Sliced Invoices template files..**

| | |
|--|---|
|  sliced-invoice-display.php | sliced-invoice-display.php was NOT found in the Theme folder - Add this custom template to the Theme. Add this Custom Template to Your Theme |
|  sliced-quote-display.php | The Template in the Theme folder is NEWER than (or same as) the Template in the Plugin You are Good! |
|  sliced-payment-display.php | The Template in the Theme folder is NEWER than (or same as) the Template in the Plugin You are Good! |

*****NOTE*** There is/are 1 template issues above that should be addressed in order to have full functionality of the custom templates.**

RETURN

Admin Custom Templates

List of Off-Line Payment Instructions added to your payment method

- Pay with Cash
- Pay with Cash App
- Pay with Check
- Pay with Zelle
- Pay with PayPal or Credit Card

This Invoice is Past Due. (was due Jun 02, 2025)



Popup Window

From:
 ABIDIN'S APPS
 9226 Talisman Dr.
 Vienna, VA 22182
 service@abidinsapps.com
 856-630-8215

To:
 Jean Test Center
 1 Underdown Rd.
 Ann Arbor, MI 48105
 jun@abidin.com

INVOICE

Past Due Notice Added.

| | |
|------------------|-------------------|
| Invoice Number | INV-AA2057 |
| Invoice Date | April 4, 2025 |
| Due Date | June 1, 2025 |
| TOTAL DUE | \$2,925.00 |

Invoice Title & Date Added (same functionality for Quotes)

2025 Notional Test Center Control App

Developed a custom WordPress plugin that:

This is a sample screen-shot using all 3 custom SI Templates

RETURN

Admin Custom Templates

When a customer clicks on any of the "Offline" payment options, a popup windows displays that payment method's instructions.

Pay with Cash Pay with Cash App Pay with Check Pay with Zelle Pay with PayPal or Credit Card

This Invoice is Past Due. (was due ...)

ABIDIN'S APPS

Popup Window

From:
 ABIDIN'S APPS
 9226 Talisman Dr.
 Vienna, VA 22182
 service@abidinsapps.com
 856-630-8215

To:
 Jean Test Center
 1 Underdown Rd.
 Ann Arbor, MI 48105
 jun@abidin.com

2025 Notional Test Center

Developed a custom WordPress plugin that:

- Automates the vendor Membership Tier Assignment process after payment.
- Automatically assigns existing and new vendors to the FREE Tier (currently Tier 1) when they complete the request to become a vendor.
- Automatically restricts vendors from going over their product limit.

ABIDIN'S APPS

Pay with Zelle

Send \$2,925 via Zelle from your bank account.

Abidin's Apps Account Email: randy@abidin.com
 or
 Abidin's Apps Account Phone: 856-630-8215

RETURN

Admin Offline Payment Instructions

Abidin's Apps Test Site 0 + New UpdraftPlus Howdy, aa-rlab

Sliced Invoice Schedule v1

Invoice Schedule URL Offline Payments Custom Templates 1 Misc Future Instructions Donate

Add/Delete Offline Payment Methods

Click on the Payment Method name to edit the offline payment instructions
(these setting will only take effect on the [custom templates](#) provided by this plugin).

Add a new Payment Method in the field provided, and/or delete a Payment Method by checking the box next to the payment name and clicking 'Add/delete Payment Method(s).

| Delete | Payment Method |
|--------------------------|---|
| <input type="checkbox"/> | Cash |
| <input type="checkbox"/> | Cash App |
| <input type="checkbox"/> | Check |
| <input type="checkbox"/> | Zelle |
| | <input type="text" value="Enter new Payment Method"/> |

Add/Delete Payment Method(s)

Settings 1

General Writing Reading Discussion

If the sliced-payment.php custom template is used, the Online Payments Tab will appear.

The plugin is seeded with the following payment methods: Cash, Check, CashApp, and Zelle.

Click on the Payment Method name and add instructions for customers to pay offline.

If you do not accept any of these methods, check the checkbox to the left of the name and click "Add/Delete Payment Methods".

If you accept another method, like Venmo, Enter it in the "New Payment Method" field and click "Add/Delete Payment Methods".

RETURN

Admin Edit Offline Payment Instructions

Abidin's Apps Test Site

Sliced Invoice Schedule

Invoice Schedule URL Offline Payments Custom Templates Misc Future Instructions

Cash Payments Instructions:

Cash

Payment Method Title: Cash

Paragraph B I List Bulleted List Quote List Table Link Unlink Table of Contents

Send the %balance_of_invoice% via armored car 😊

My_Business_Name
My_Street_Address
My_City, State-ZIP

Update Cash Payment Info Reset

Wildcards:
%balance_of_invoice% = Balance (or Total) of the invoice.

Pay by Cash Example:
The plugin will enter the value of the invoice (or balance if partial payment made) in the wildcard %balance_of_invoice%.

Enter your company name & address for mailing.
When finished, click "Update...".

Admin can also change the Title of the payment method

RETURN

Admin Edit Offline Payment Instructions

WordPress Admin Dashboard: Abidin's Apps Test Site | 0 New | UpdraftPlus | Howdy, aa-rlabidin

Dashboard | Posts | Media | Pages | Comments | Projects | Quotes | Invoices | Appearance | Plugins | Users | Tools | **Settings 1**

General | Writing | Reading | Discussion | Media | Permalinks | Privacy | **Invoice Schedule 1**

Sliced Invoice Schedule v1.

Invoice Schedule URL | **Offline Payments** | Custom Templates 1 | Misc | Future | Instructions | Donate

Zelle Payments Instructions:

Zelle

Payment Method Title: Zelle

Pay by Zelle Example:
You can edit these instructions to whatever you want.

Visual | Code

Paragraph | **B** | *I* | [List Icons] | [Quote Icon] | [Link Icon] | [Table Icon]

ABC - [Text Color] [Background Color] [Link] [Undo] [Redo] [Help]

Send %balance_of_invoice% via Zelle from your bank account.

My_Business_Name Account Email: name@example.com
or
My_Business_Name Account Phone: 123-456-7890

Update Zelle Payment Info | Reset

RETURN

Admin Miscellaneous Settings

WordPress Admin Interface: Abidin's Apps Test Site

Sliced Invoice Schedule

Invoice Schedule URL | Offline Payments | Custom Templates | **Misc**

Miscellaneous Settings

1

* Invoice/Quote Title Length

Set the Length of the Invoice/Quote Name in the 1st column of the Annual Schedule. If the title is too long it will disrupt the layout of the schedule.

Invoice/Quote Title Length:

2

* Invoice Title

Check the box to display the Title on the Invoice and Quote

Invoice/Quote Title Displayed

If the Invoice/Quote Title checkbox (just above) is selected, check the box to Display the Year, Month, or Day as part of the title of the "recurring" Invoice.

Year Displayed (for invoices recurring yearly)

Month Displayed (for invoices recurring monthly)

Day Displayed (for invoices recurring daily - hey, if I didn't put it in, someone would ask for it :-)

Full Date Displayed Always (Always displays the full date (recurring & one-time) - overrides the above 3 checkboxes)

As of this version of the plugin there are 2 miscellaneous settings

- 1. Invoice/Quote Title Length:**
Some titles can get very lengthy and can disrupt the layout of the schedule. Play with the values and review how it looks on the schedule layout. 40 characters is the default.
- 2. Title on the Invoice or Quote**
The Sliced Invoices core plugin does not show the Title on the Invoice or the Quote. This setting turns the Title on/off. If the Title is turned on, the next set of checkboxes, give you the option of adding the date in front of the Title.

[RETURN](#)

Admin Future Features & Instructions

The screenshot shows a web application interface with a dark sidebar on the left and a main content area. The sidebar contains a navigation menu with items: Dashboard, Posts, Media, Pages, Comments, Projects, Quotes, Invoices, Products, Profile, Tools, Settings (highlighted in blue), Invoice Schedule, and Collapse menu. The main content area is titled 'Sliced Invoice Schedule' and has a horizontal tab bar with tabs: Invoice Schedule URL, Offline Payments, Custom Templates, Misc, Future, and Instructions. The 'Future' and 'Instructions' tabs are highlighted. Below the tabs, the text 'Reserved.' is visible. Two callout boxes are present: one labeled 'Future Features' pointing to the 'Future' tab, and another larger one labeled 'Link to the PDF file containing the latest version of these instructions' pointing to the 'Instructions' tab. A 'RETURN' button is located in the bottom right corner.

Future Features

Link to the PDF file containing the latest version of these instructions

RETURN

Invoice Annual Schedule 1 of 2

2024 ▾ Abidin's Apps Customer Invoice Schedule (Annual = \$24,677)

| INVOICE | JAN | FEB | MAR | APR | MAY | JUN | JUL | AUG | SEP | OCT | NOV | DEC |
|----------------------|-----------|-----------|-----------|-----------|-----------|-----|---------|---------|-----|-----|-----|-----|
| Monthly Totals | \$2,927 | \$6,015 | \$6,893 | \$2,250 | \$3,217 | \$0 | \$817 | \$2,558 | \$0 | \$0 | \$0 | \$0 |
| 1. Invoice title 1 | | | | | \$165 D | | | | | | | |
| | | | \$436 P | | | | | | | | | |
| | \$350 P | | | | | | | | | | | |
| 4. Invoice title 4 | \$350 P | | | | | | | | | | | |
| 5. Invoice title 5 | | | | | \$1,815 O | | | | | | | |
| 6. Invoice title 6 | | | | | \$825 D | | | | | | | |
| 7. Invoice title 7 | | | | | | | \$817 D | | | | | |
| 8. Invoice title 8 | | | \$1,524 P | | | | | | | | | |
| 9. Invoice title 9 | \$2,228 P | | | | | | | | | | | |
| 10. Invoice title 10 | | | | | \$300 U | | | | | | | |
| 11. Invoice title 11 | | | | | \$300 O | | | | | | | |
| 12. Invoice title 12 | | | \$782 D | | | | | | | | | |
| 13. Invoice title 13 | | \$3,300 O | | | | | | | | | | |
| 14. Invoice title 14 | | | | \$900 O | | | | | | | | |
| 15. Invoice title 15 | | | | \$1,350 O | | | | | | | | |
| 16. Invoice title 16 | | | \$50 P | | | | | | | | | |

Select Year

Notes:

- April is shown as current month
- Monthly Subtotals in heading
- Annual total at top

Invoice Glossary:

Recurring Invoice
One Time Invoice
D=>Draft
U=>Unpaid
P=>Paid
O=>Overdue

[Switch to the Quotes Schedule](#)

[Switch to Quotes Schedule](#)

*** NOT listed above *** Invoices without a Due Date:
- Weekly Test

- Invoice schedule keyed on Due Date.
- If missing, they will not show up on schedule.
- They are listed here.

[RETURN](#)

Invoice Annual Schedule 2 of 2

2024 ▾ Abidin's Apps Customer Invoice Schedule (Annual = \$24,677)

| INVOICE | JAN | FEB | MAR | APR | MAY | JUN | JUL | AUG | SEP | OCT | NOV | DEC |
|-----------------|-----------|-----------|-----------|---------|-----------|-----|-------|---------|-----|-----|-----|-----|
| Monthly Totals | \$2,927 | \$6,015 | \$6,893 | \$2,250 | \$3,217 | \$0 | \$817 | \$2,558 | \$0 | \$0 | \$0 | \$0 |
| 1. Customer 1 | | | | | \$165 D | | | | | | | |
| 2. Customer 2 | | | | | | | | | | | | |
| 3. Customer 3 | | | | | | | | | | | | |
| 4. Customer 4 | | | | | | | | | | | | |
| 5. Customer 5 | | | | | \$1,815 O | | | | | | | |
| 6. Customer 6 | | | | | \$825 D | | | | | | | |
| 7. Customer 7 | | | | | | | | | | | | |
| 8. Customer 8 | | | \$1,524 P | | | | | | | | | |
| 9. Customer 9 | \$2,228 P | | | | | | | | | | | |
| 10. Customer 10 | | | | | \$300 U | | | | | | | |
| 11. Customer 11 | | | | | \$300 O | | | | | | | |
| 12. Customer 12 | | | \$782 D | | | | | | | | | |
| 13. Customer 13 | | \$3,300 O | | | | | | | | | | |
| 14. Customer 14 | | | | | | | | | | | | |
| 15. Customer 15 | | | | | | | | | | | | |
| 16. Customer 16 | | | | | | | | | | | | |
| 17. Customer 17 | | \$2,558 P | | | | | | | | | | |
| 18. Customer 18 | | \$2,558 O | | | | | | | | | | |
| 19. Customer 19 | | | | | | | | | | | | |
| 20. Customer 20 | | | | | | | | | | | | |
| 21. Customer 21 | | | | | | | | | | | | |
| 22. Customer 22 | | | | | | | | | | | | |

Click on any customer in 1st column. It contains a link to all invoices of that client in the Dashboard.

Click on any invoice value in month. Contains link to edit that invoice in Dashboard.

One Time Project
 \$3,300
 INV-AA-2037
 Overdue
 Payment: \$900 (2023-12-16)
 Payment: \$700 (2024-01-02)
 Payment: \$350 (2024-02-03)
 Payment: \$300 (2024-02-05)
 Payment: \$150 (2024-02-07)
 Payment: \$300 (2024-03-11)
 Payment: \$500 (2024-05-03)
 Balance: \$100

Click to review this Invoice.

Mouse-over Invoice value to see drop-down with Invoice details.

RETURN

Quote Annual Schedule 1 of 2

2024 ▾ Abidin's Apps Customer Quote Schedule (Annual = \$7,599)

| INVOICE | JAN | FEB | MAR | APR | MAY | JUN | JUL | AUG | SEP | OCT | NOV | DEC |
|------------------|-----|-----|-----|---------|-----------|-----|-----|-----|-----|-----|-----|-----|
| Monthly Totals | \$0 | \$0 | \$0 | \$165 | \$7,434 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 |
| 1. Quote title 1 | | | | | \$990 S | | | | | | | |
| 2. Quote title 2 | | | | | \$2,723 C | | | | | | | |
| 3. Quote title 3 | | | | \$165 E | | | | | | | | |
| 4. Quote title 4 | | | | | \$3,075 A | | | | | | | |
| 5. Quote title 5 | | | | | \$317 D | | | | | | | |
| 6. Quote title 6 | | | | | \$330 S | | | | | | | |

Same layout and features as Invoice View.

Quote Glossary: D=>Draft S=>Sent A=>Accepted X=>Declined E=>Expired C=>Cancelled

[Switch to the Invoices Schedule](#)

Quotes without a Valid Through Date:

- [Control System Quote](#)

- Quotes schedule keyed on Creation Date.
- They will show up on schedule.
- If missing, they will not show up on schedule.
- They are listed here.

RETURN

Quote Annual Schedule 2 of 2

2024 ▾ Abidin's Apps Customer Quote Schedule (Annual = \$7,599)

| INVOICE | JAN | FEB | MAR | APR | MAY | JUN | JUL | AUG | SEP | OCT | NOV | DEC |
|------------------|-----|-----|-----|---------|-----------|-----|-----|-----|-----|-----|-----|-----|
| Monthly Totals | \$0 | \$0 | \$0 | \$165 | \$7,434 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 |
| 1. Quote title 1 | | | | | \$990 S | | | | | | | |
| 2. Quote title 2 | | | | | \$2,723 C | | | | | | | |
| 3. Quote title 3 | | | | \$165 E | | | | | | | | |
| 4. Quote title 4 | | | | | | | | | | | | |
| 5. Quote title 5 | | | | | | | | | | | | |
| 6. Quote title 6 | | | | | | | | | | | | |

\$165
 QUO-AA1013
 Created: 2024-05-16
 Valid Until: 2024-04-26
 Expired
 Click to review this Quote.

Quote Glossary: D=>Draft S=>Sent A=>Accepted X=>Declined E=>Expired C=>Cancelled

[Switch to the Invoices Schedule](#)

Quotes without a Valid Through Date:
 - [Control System Quote](#)

The Quotes Schedule view has the same functionality as the Invoice schedule view

RETURN

END