



Translation Office 3000, Version 10 Help

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1 Welcome to Translation Office 3000, Version 10



Translation Office 3000, Version 10

TO3000, Version 10 is advanced software, which easily and seamlessly integrates to the business life of freelance translators.

It transforms the complex and diverse world of the translation business into an easy to understand concept implemented in the software.

You can either browse the help topics to learn about **Translation Office 3000, Version 10** in consecutive way or invoke context-sensitive topics of **Help System** from any location of **TO3000, Version 10** by pressing **F1 key**.

If you have any questions, one of our team members would be pleased to assist you.

Contact us at

<http://www.aithelp.com/>

2 What's new in TO3000, Version 10

TO3000, Version 10 is our major release of portable headquarters for freelance translators.

- Now **projects are optional**. You can create jobs directly in client profiles, bypassing projects.
- **Fully Unicode-based**.
- New Embedded **Firebird Server 2.5**.
- **Custom fields for Invoices** are now available.
- TO3000 now can be run under all common **virtual machine software**.
- **Improved interface**. Now TO3000 has more comfortable and modern interface.
- **AnyCount 7.0 Enterprise**. TO3000 now includes built-in Enterprise edition of wordcount engine AnyCount 7.0. Additionally to previous version it supports PPTX, PPSX, PUB, VSD, SLP, BMP, GIF, JPG, PNG and graphic PDF count.
- **New default Custom Reports**. Number of default Custom Reports is greatly extended.
- **Catalan** and **Hindi** localizations added.
- **Job volume** is re-counted automatically if volume unit has been changed.
- **Payments** can be created directly from **Invoices**.
- **Secure FTP** is supported.
- **Schedules** now have special hints that allows to see all common information without opening of appropriate projects/jobs.
- **Local Custom Filter** is now available for Schedules sections.
- **Local Custom Filter** now allows to filter jobs by both completed date and status (yes/no).
- **Major improvements** in filtering by **Custom Fields** using Local Custom Filter.
- **Major improvements** in **Local Report** block.
- **Improved calendar**. Now you can type date, month and year data in calendars manually.
- **New version** of integrated report engine **Fast Report 4.12** is included.
- **Discounts and taxes** now are remembered for clients.
- **Projects** now has a special field to indicate projects based on quotes.
- Multiple bug fixes and enhancements.

3 System requirements

Hardware & Software	TO3000, Version 10 Requirements
Operating System	Windows ME Windows 2000 Windows XP Windows 2003 Windows Vista Windows 7
CPU	300Mhz or higher
Memory	256Mb or more
Hard Disk Space	20Mb for initial setup plus variable space for database*
Monitor	Any VGA/SVGA monitor with support for minimum of 640x480 resolution and 256 colors

 **Note:** It is important to have enough space for database (at least 100–200Mb at any given moment) so that it grows naturally without any problems and errors due to insufficient hard drive space.

4 TO3000, Version 10 Setup

To install [TO3000, Version 10](#):

1. **Download** [TO3000, Version 10 setup file](#) using the following link:

<http://download.to3000.com/SetupTO3000V10.exe>

2. **Run** [SetupTO3000V10.exe](#) and proceed with the **Setup Wizard** steps.

2.1. During the setup procedure, [TO3000, Version 10 Setup](#) will prompt you to select components to install.

- **Demo database**. Select this option if you are installing [TO3000, Version 10](#) for evaluation. This database contains some records, imitating the workflow data of a freelance expert.
- **Empty database**. Select this option to install clean database before you begin entering your actual workflow data to [TO3000, Version 10](#). If you already have a database installed, please move away or delete this database, before running [TO3000, Version 10 Setup](#).
- **Do not install database**. In case you are just updating your [TO3000, Version 10](#), and you already have your database up and running and there is no need to install another one.

 **Note:** As a security measure, [TO3000, Version 10 Setup](#) under no circumstances shall overwrite existing database. If you would like to install new database, please remove or delete existing database file manually before running [TO3000, Version 10 Setup](#).

[TO3000, Version 10](#) database file is located in [TO3000, Version 10](#) setup folder:

`\\Translation Office 3000 V10\db\TO3000.fdb`

Please be sure not to delete this file accidentally, because it contains all your workflow data.

5 Upgrade to TO3000, Version 10

Installing and registering TO3000, Version 10

TO3000, Version 10 can be installed and run along with earlier versions of TO3000 for evaluation purposes.

To upgrade from TO3000 V7, TO3000 V8 or TO3000 V9.0 to TO3000, Version 10, you will need to do the following steps:

1. Install new TO3000, Version 10 to the same PC as the old version opting "Do not install database";
2. Run TO3000 Database Converter;
3. Convert your database from a previous version of TO3000;
4. Copy the converted database to setup folder of TO3000, Version 10;
5. Register TO3000, Version 10.

Running TO3000, Version 10 <%PROGVERSION%> Database Converter

TO3000, Version 10 Database Converter is an application supplied in the standard TO3000, Version 10 setup. It allows to transfer a database from Translation Office 3000 (Versions 7, 8 and 9) and. Running TO3000, Version 10 Database Converter is a convenient way to upgrade database from previous version TO3000 to operate with TO3000, Version 10.

1. Run the converter from either startup menu or by double-clicking DBConverter.exe file (the default location is ...\\Translation Office 3000 Version 10 \\Admin\\DBConverter).
2. Select your current version of TO3000 database and click **Next** button.
3. Select **Create TO3000 10 Database** radio button.
4. TO3000, Version 10 Database Converter will automatically locate installation of TO3000 and select the source database file to be transferred. In a case if the program cannot find TO3000 database, click **Browse** button, manually specify a path to the source database file and click **Next** button.
5. Specify a directory into which the database file should be outputted and click **Next** button.
6. Click **Start** button to convert the database for TO3000, Version 10.
7. Create "db" folder in ...\\Program Files\\AIT\\Translation Office 3000 Version 10\\ folder.
8. Copy the created TO3000.fdb file into ...\\Program Files\\AIT\\Translation Office 3000 Version 10 \\db\\ folder.
9. Run TO3000, Version 10 and register it using your Serial Number.

 **Important Note:** Make sure that you convert a database under the same *Language for non-Unicode programs* as on your work computer. For example, if you have worked with French characters in a previous version of TO3000, Version 10 or TO3000, it is required to have French as

Language for non-Unicode programs in *Region and Language* options of the computer, in which you perform converting of the TO3000, Version 10 database.

Information regarding changing of this option is available at:

- For Windows XP: http://www.microsoft.com/resources/documentation/windows/xp/all/proddocs/en-us/int_pr_select_language_version.msp?mfr=true
- For Windows Vista: <http://windows.microsoft.com/en-US/windows-vista/Change-the-system-locale>
- For Windows 7: <http://windows.microsoft.com/en-US/windows7/Change-the-system-locale>

 **Note:** If you are installing TO3000, Version 10 on a new PC, ensure that *Business* folder used by previous version TO3000 is copied to the new location.

 **Note:** *Templates*, *CAT schemes* and *Local Custom Filter settings* will not be imported. Please move them manually to TO3000, Version 10 setup folder. Below please find locations of *templates*, *CAT schemes* and *Local Custom Filter settings* in TO3000 V8, TO3000 V9.0 and in TO3000, Version 10:

Templates

- TO3000 V8: ...\\Translation Office 3000 V8\\Templates\\
- TO3000 V9.0: ...\\Translation Office 3000 Version 9.0\\Templates\\
- TO3000, Version 10: C:\\Users\\Public\\Documents\\AIT\\TO3000, Version 10\\Templates\\

CAT schemes

- TO3000 V8: ...\\Translation Office 3000 V8\\System\\Schemes\\
- TO3000 V9.0: ...\\Translation Office 3000 Version 9.0\\Schemes\\
- TO3000, Version 10: C:\\Users\\Public\\Documents\\AIT\\TO3000, Version 10\\Schemes

Local Custom Filter settings

- TO3000 V8: ...\\Translation Office 3000 V8\\Filters\\
- TO3000 V9.0: ...\\Translation Office 3000 Version 9.0\\Filters\\
- TO3000, Version 10: ...C:\\Users\\Public\\Documents\\AIT\\TO3000, Version 10\\Filters\\

 **Note:** In *Windows XP* C:\\Users\\Public\\Documents\\AIT\\... folder corresponds to C:\\Documents and Settings\\All Users\\Documents\\AIT\\... folder.

6 Quick start

The following guidelines describe the most basic working procedures in [TO3000, Version 10](#), such as:

- Setting currencies and services
- Creating Client database
- Creating Quotes and Projects
- Creating jobs

1. Setting currencies and services. Newly installed [TO3000, Version 10](#) will not have all the **currencies** you need. However, all required currencies can be quickly added to the database. Also, you may need to adjust your **base currency**. Having installed [TO3000, Version 10](#) please take a moment to set the system up for your business.

 **Note:** "Base currency" is the currency in which you prefer to keep your accounts. For more information about base currency, please refer to Multi-Currency Support topic.

➔ To enter **new currencies**:

- Run [TO3000, Version 10](#), click menu **Settings > Business**.
- Click **Currencies** to open currencies section of **Business Settings** menu.
- Click **New** button to create a new currency record.
- Enter new currency **Descriptive Name** and 3-letter abbreviation in the **New Currency** window.

➔ To change your **base currency**:

- Click menu **Settings > Advanced**.
- Click **General**.
- Click **Base Currency** button and select your base currency.

Services in [TO3000, Version 10](#) can vary from "*translation from source to target language*" to more unusual ones like "*training*" or "*consulting*". You can enter services of any type in [TO3000, Version 10 Business Settings](#).

➔ To add a service (language pairs translation, proofreading, DTP and so on):

- Click menu **Settings > Business**.
- Click Groups of Services and add a group for new service (optional).
- Click Services section and enter new service by clicking **New** button.

2. Creating Client database. There are two ways to fill your database of **Clients**: entering all the Clients manually or importing them from a file. Also, if you own previous versions of **Translation Office 3000** — you can quickly import your **Clients** (along with all other data) from **TO3000** database.

➔ To enter **new Client** manually:

- Click menu **New... > Client**.
- Follow the steps of **New Client Wizard**.

Use Import Utility to import Client data from .xls, .dbf, .txt, .csv, and .mdb format to your **TO3000, Version 10** database.

➔ To **import Client** database from a file:

- Run SetupTO3000V9.exe and install **TO3000, Version 10 Import Utility**.
- Run **TO3000, Version 10 Import Utility** and proceed with import process.

See Importing client data

Please refer to Upgrade to TO3000, Version 10 topic for details on importing data from previous version of TO3000.

3. Creating Quotes and Projects. **Quotes** and **Projects** can be created using Quotes tab of Client window and Main tab of Project window respectively. A Project can also be created using data from certain quote.

➔ To **create a Quote**:

- Open **Clients** section of **Navigation panel** and click **Client** icon.
- Click **Quotes** tab.
- Click **New Quote** button, to begin creating new **Project**.

➔ To **create a Project** (for *With Projects Mode*):

- Open **Projects** section of **Navigation panel** and click **Project** icon.
- Click **Main** tab.
- Click **New Project** button, to begin creating new **Project**.

4. Creating jobs. In *TO3000, Version 10* any Project consists of a number of jobs. A job represents a certain amount (characters, words, hours, custom units) of certain service (like translation from source to target language), assigned on certain date and having a deadline.

The quickest way to create *Jobs* is to do so in the **Tree** tab of **Project** window. For more information about jobs please refer to Project window Tree tab topic.

➔ To **create Client Jobs** (for *With Projects Mode*):

- Open **Projects** section of **Navigation panel** and click **Project** icon.
- Click **Main** tab and select a **Project**.
- Click **Tree** tab.
- Right-click the **Project** icon at the top of the Tree view and select **New Client Job** in the context drop-down menu.

Alternatively, click menu **New... > Job** to quickly create a job.

➔ To **create Client Jobs** (for *Without Projects Mode*):

- Open **Clients** section of **Navigation panel** and click **Client** icon.
- Click **Main** tab and select a **Client**.
- Click **Client Jobs** tab and click **New** button to create a *client job*.

Alternatively, click menu **New... > Job** to quickly create a job.

5. Issuing Invoices

TO3000, Version 10 can be used to quickly issue, edit and delete Invoices to Clients and settle them by linking invoices with payments.

➔ To **create** an **Invoice to Client**:

- Open **Clients** section of **Navigation panel** and click **Client** icon.
- Click **Main** tab and select a **Client**.
- Click **Invoices** tab.
- Click **New** button to begin creating an Invoice for this client. See Creating invoices to clients
- Add required **Client Jobs**, select markups and discounts, and click **Apply** button.

Alternatively, click menu **New... > Invoice** to quickly create an invoice to client.

➔ To **create** an **Payment from Client**:

- Open **Clients** section of **Navigation panel** and click **Client** icon.
- Click **Main** tab and select a **Client**.
- Click **Payments** tab.
- Click **New** button to begin creating an payment from this client.

Alternatively, click menu **New... > Payment** to quickly create a payment from this client.

7 Registration

Trial period

You are welcome to use [TO3000, Version 10](#) free of charge during evaluation period of **30 days**.

During the evaluation period [TO3000, Version 10](#) is fully functional, with the following limitations:

- Number of **Clients** can be no more than **50**;
- Number of **Projects** can be no more than **50**;

Purchase information

After purchasing [TO3000, Version 10](#), you will receive an encrypted *License Key* for your [TO3000, Version 10](#) by e-mail.

 **Note:** Registration implies entering the License Keys to the [TO3000, Version 10](#), thus switching off the evaluation mode and removing evaluation period limitations.

Registering TO3000, Version 10

To register your copy of [TO3000, Version 10](#):

1. Run [TO3000, Version 10](#).
2. Click menu **Help > Register**.
3. Paste your [TO3000, Version 10 Serial Number](#), which you will receive by email into **Register TO3000, Version 10** dialog box, which appears, and click **Unlock**.

8 TO3000 Editions

TO3000, Version 10 has 4 editions: *Starter*, *Standard*, *Professional* and *Advanced*. Their features are described in the table below.

Feature/Edition	Starter	Standard	Professional	Advanced
Maximum number of clients	50	250	1000	unlimited
Built-in AnyCount	No Built-in Anycount	Standard (13 file formats)	Professional (32 file formats)	Enterprise (36 file formats)
Standard Reports	No Standard Reports	9	16	24
Client Information	✓	✓	✓	✓
Client Prices	✓	✓	✓	✓
Client Jobs	✓	✓	✓	✓
Invoices to Clients	✓	✓	✓	✓
Payments from Clients	✓	✓	✓	✓
Balances of ClientsClient balance	✓	✓	✓	✓
Support via E-mail	✓	✓	✓	✓
Unicode	✓	✓	✓	✓
26 localizations	✓	✓	✓	✓
Import and Conversion Utilities	✓	✓	✓	✓
Built-in CATCount	-	✓	✓	✓
File Management	-	✓	✓	✓
General Prices for Clients	-	✓	✓	✓
Quotes to Clients	-	✓	✓	✓
Projects	-	-	✓	✓
Custom Fields	-	-	✓	✓
Automatic Folder Creation	-	-	✓	✓
FTP management	-	-	✓	✓
Clone clients, contacts, jobs	-	-	✓	✓
Schedule of Client Jobs	-	-	✓	✓
Business Expenses	-	-	✓	✓
Live chat support	-	-	✓	✓
Custom Variables	-	-	-	✓
Custom Reports	-	-	-	✓
Custom Queries	-	-	-	✓

9 Workflow Modes

Workflow Modes was designed to take into consideration two most widespread workflow modes of Freelance Translators:

- **With Projects Mode.** This workflow mode allows to group jobs in a project.
- **Without Projects Mode.** This workflow mode allows to work with jobs without necessity to create a project..

 **Note:** *Workflow Modes* can be changed in **Settings** menu > **Workflow Modes**.

Workflow Mode can be changed at any time and it will not affect on operability of TO3000.

If you have worked in **Without Projects Mode** and then changed *Workflow Mode* to **With Projects Mode**, all your previously created *client jobs* will be displayed under a project with name "[Default] Client Jobs <Client Name>" (such *project* will be created for all your *clients* that have *client jobs*).

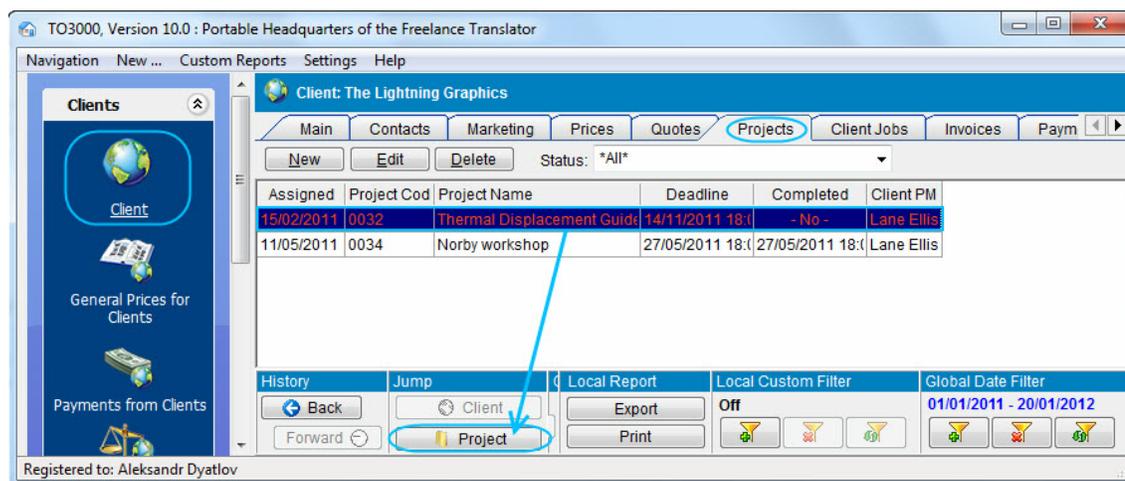
If you have worked in **With Projects Mode** and then changed *Workflow Mode* to **Without Projects Mode**, all your previously created *client jobs* will be displayed in the single list on **Clients** > **Client** > **Client Jobs** tab.

9.1 With Projects Mode

To choose **With Projects Mode**, click **Settings** option and then click **Workflow Modes**. In the opened window choose **With Projects Mode** and click **Ok** button.

This mode has the following workflow:

1. Create a *client*. For this go to **Clients > Client** and click **New Client** button.
2. Create a *project* of this *client*. For this go to **Projects tab** of the client and click **New** button.
3. Create *client jobs* assigned to the *project*. For this click **Jump to Projects** button (in the bottom side of the screen), then switch to **Client Jobs tab** and click **New** button.



In **With Projects Mode** jobs cannot be created without a project.

With Projects Mode will be useful for freelance translators who:

- Group several jobs in a project.
- Perform several task for one job. For example, if you make translation, proofreading and DTP for one job (e.g. "Brochure"), you can create a *project* with name "Brochure" and then create several *client jobs*: Brochure - Translation, Brochure - DTP, Brochure - Proofreading where translation, proofreading and DTP are *group of services*.
- Translate jobs on several languages. For example if you make translation English => German and English => Spanish for one job (e.g. "Brochure"), you can create a *project* with name "Brochure" and then create two *client jobs*: Brochure - English => German, Brochure - English => Spanish, where translation, proofreading and English => German and English => Spanish are *services*.

With Projects Mode will not be useful for freelance translators who receive separate jobs from a client and do not need to group them in any way.

9.2 Without Projects Mode

To choose **With Projects Mode**, click **Settings** option and then click **Workflow Modes**. In the opened window choose **Without Projects Mode** and click **Ok** button.

This mode has the following workflow:

1. Create a *client*. For this go to **Clients > Client** and click **New Client** button.
2. Create a *client jobs* of this *client*. For this go to **Client Jobs tab** of the client and click **New** button.

Without Projects Mode will be useful for freelance translators who receive separate jobs from a client and do not need to group them in any way.

With Projects Mode will be not useful for freelance translators who:

- Group several jobs in a project.
- Perform several task for one job. For example, if you make translation, proofreading and DTP for one job (e.g. "Brochure"), you can create a *project* with name "Brochure" and then create several *client jobs*: Brochure - Translation, Brochure - DTP, Brochure - Proofreading where translation, proofreading and DTP are *group of services*.
- Translate jobs on several languages. For example if you make translation English => German and English => Spanish for one job (e.g. "Brochure"), you can create a *project* with name "Brochure" and then create two *client jobs*: Brochure - English => German, Brochure - English => Spanish, where translation, proofreading and English => German and English => Spanish are *services*.

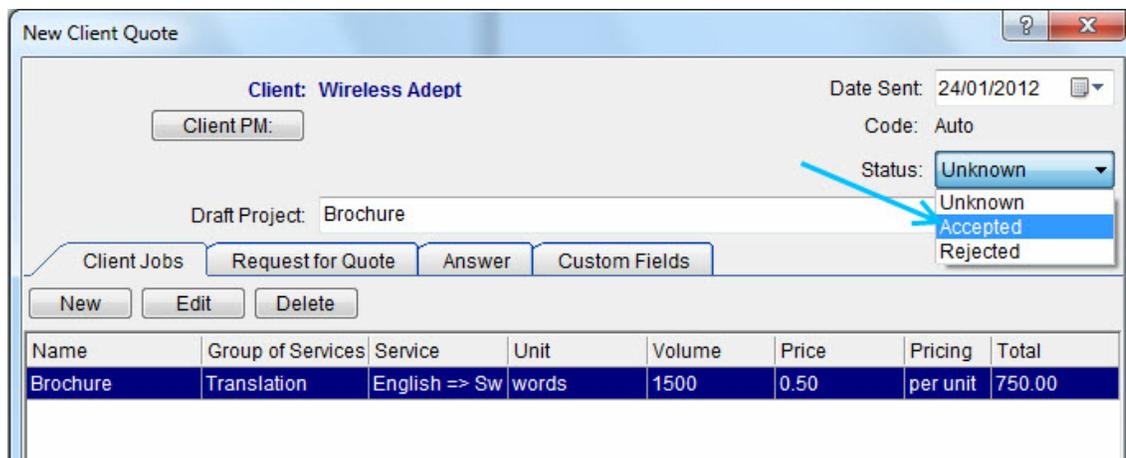
9.3 Common workflow

After creation of *jobs* (see topics above) there is the following workflow:

1. After *jobs* has been completed, you can mark them as *completed*, entered to these jobs (Clients > Client > Client Jobs tab > Edit button). Then go to Clients > Client > Invoices tab and create a new invoice, clicking New button. Add all necessary jobs to this invoice, select taxes, discounts and click Ok button.
2. After a payment for this invoice has been received, go to Clients > Client > Payments tab, click New button, type a value of this payment, switch to Linked with Invoices tab, click New Link button and connect this payment with appropriate invoices. Click Ok button. Alternatively, you can click **Mark as Paid** button in **Edit Invoice** window to create a payment according to the *invoice's total*.

 **Note:** In **With Projects Mode** projects can be marked as *completed* too. To change a *status* of a *project* go to **Projects > Project > Main** tab or **Clients > Client > Projects** tab.

If you need to send a *quote* to a *client*, go to **Clients > Client > Quote** tab and click **New** button. Type a name of this *quote* and add all necessary *jobs* there. After your *quote* has been accepted, go to **Clients > Client > Quote** tab, select this *quote* and change its status to **Accepted**.



Name	Group of Services	Service	Unit	Volume	Price	Pricing	Total
Brochure	Translation	English => Sw	words	1500	0.50	per unit	750.00

Also you can create a *project* (*client jobs*) based on a *quote*. For this go to **Clients > Client > Quote** tab, select an appropriate *quote* and click **Create Project based on Quote (Create Client Jobs based on Quote)** button.

 **Note:** **Create Project based on Quote** button will appear if **With Projects Mode** is enabled. **Create Client Jobs based on Quote** button will appear if **Without Projects Mode** is enabled.

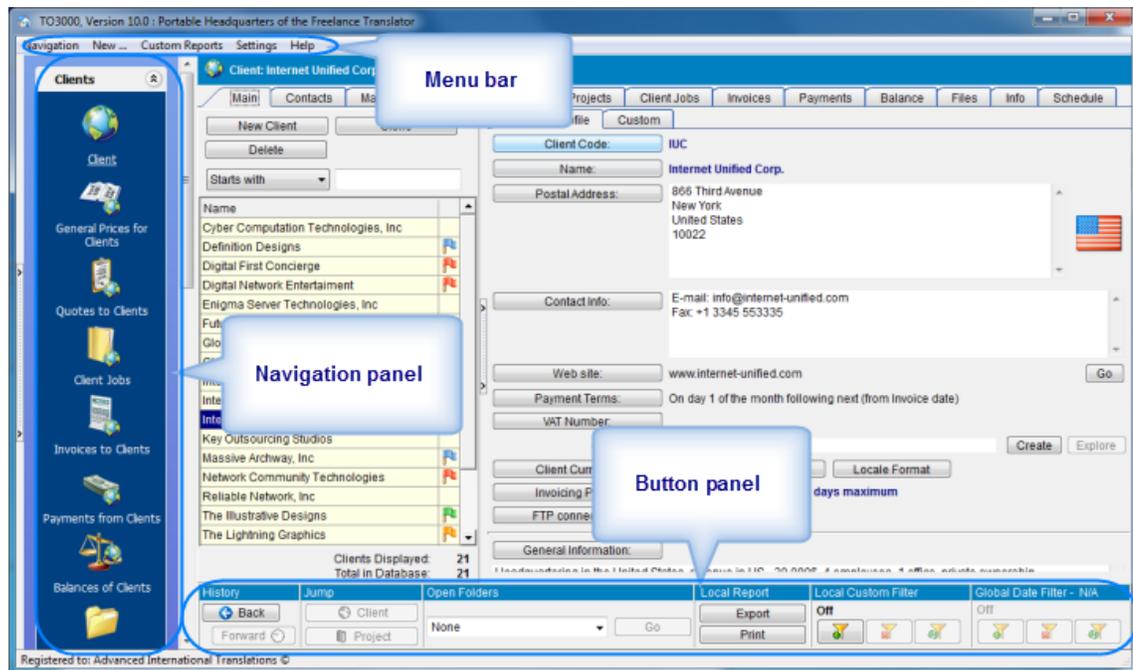
Client: Wireless Adept

Main Contacts Marketing Prices **Quotes** Projects Client Jobs

New Quote Edit Delete **Create Project Based on Quote**

Code	Name	Sent	Assigned	Deadline	Status	Total	Total (EUf	Client
Q-WIREAL	Brochure	24/01/201	04/01/201	11/01/201	Accepted	750.00	471.00	Wireles

10 User interface



Menu Bar

Commands, which are available in **Navigation** menu are duplicates of shortcuts (icons with text captions) available in *navigation panel*. Other menus provide tools for changing your settings, creating clients, contacts, services, quotes, jobs and invoices, managing your **TO3000, Version 10 database**, creating reports, registration options and help.

See TO3000, Version 10 menu bar topic for details.

Navigation panel

Navigation panel consists of two groups of shortcuts (icons with text captions):

1. **Clients** group consists of shortcuts: **Client**, **General Prices for Clients**, **Quotes to Clients**, **Invoices to Clients**, **Payments from Clients**, **Balance of Clients**, **Files**, and **Schedule of Projects**.
2. **Projects** group consists of shortcuts: **Project**, **Client Jobs**, **Files**, and **Schedule of Client Jobs**.

See Navigation Panel topic.

Button panel

Button panel contains a number of buttons groups:

- **History:** **Back** and **Forward** buttons; **Jump:** **Client** and **Project** buttons.
- **Open Folders** drop-down list and **Go** button quickens your access any folder, which was opened from **TO3000, Version 10** during the current working session.
- **Local Custom Filter** buttons (**Edit**, **Off**, **Recent** buttons) for managing **Local Custom Filter**, used to search necessary records in your **TO3000, Version 10** database.
- **Local Report** buttons (**Export**, **Print** buttons) for exporting the data from **TO3000, Version 10** database to other applications (you can export to .rtf, .txt, .csv, .xls, .pdf, .html formats).
- **Global Date Filter** buttons (**Edit**, **Off**, **Recent** buttons) for managing **Global Date Filter**, a searching tool allowing to display only records which date of creation fits the specified condition.

See Button panel topic.

 **Note:** When you exit **TO3000, Version 10**, the program automatically remembers the current window and currently selected record (for example, currently selected **Client**). **TO3000, Version 10** will open at the same location on the next run.

See also:

Business Settings

Personal Settings

10.1 Basic interface options

Majority of data in TO3000, Version 10 is being stored in various tables. Each of these tables can be customized to a certain extent to adopt to each user's preferences.

Sorting records

Just like in most of tables in other software applications you can sort table rows order by any column. To sort the rows in any table, click the column caption in the list.

If you want to sort your table by certain column, left-click the heading in the table:

Assigned	Deadline	Completed	Project Code
11.15.2007	12.7.2007 6:00 PM	12.7.2007 6:00 PM	0024
3.18.2008	3.24.2008 6:00 PM	3.24.2008 6:00 PM	0024
10.30.2007	11.3.2007 6:00 PM	11.3.2007 6:00 PM	0025
10.19.2007	11.3.2007 6:00 PM	11.3.2007 6:00 PM	0025

The order of sorting direction is shown as a triangle arrow near the column caption.

Assigned	Deadline ▲	Completed	Project Code
11.15.2007	12.7.2007 6:00 PM	12.7.2007 6:00 PM	0024
11.22.2007	12.14.2007 6:00 PM	- No -	0020
12.19.2007	1.19.2008 6:00 PM	- No -	0028
1.6.2008	1.23.2008 12:00 AM	1.24.2008 3:10 PM	0035

If you click the same column caption one more time, the order of sorting will be reversed.

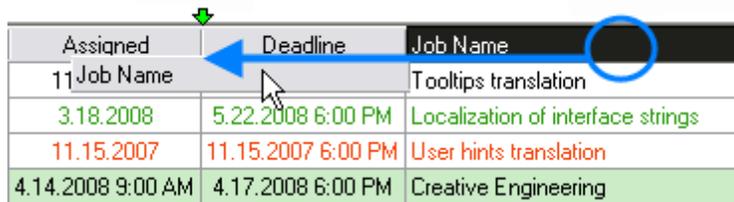
Moving columns

You can easily change the order of the columns displayed:

1. Click the **column caption** and hold the mouse button. Black line will appear to the left of this column:

Assigned	Deadline	Job Name
11.15.2007	12.7.2007 6:00 PM	Tooltips translation
3.18.2008	5.22.2008 6:00 PM	Localization of interface strings
11.15.2007	11.15.2007 6:00 PM	User hints translation
4.14.2008 9:00 AM	4.17.2008 6:00 PM	Creative Engineering

2. Drag your cursor without releasing the mouse button, to the desired column:



Assigned	Deadline	Job Name
11	Job Name	Tooltips translation
3.18.2008	5.22.2008 6:00 PM	Localization of interface strings
11.15.2007	11.15.2007 6:00 PM	User hints translation
4.14.2008 9:00 AM	4.17.2008 6:00 PM	Creative Engineering

3. Release mouse button. The column will be moved to the desired place:

Assigned	Job Name	Deadline
11.15.2007	Tooltips translation	12.7.2007 6:00 PM
3.18.2008	Localization of interface strings	5.22.2008 6:00 PM
11.15.2007	User hints translation	11.15.2007 6:00 PM
4.14.2008 9:00 AM	Creative Engineering	4.17.2008 6:00 PM

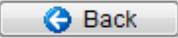
 **Note:** Optionally you can use **Move Up/Move Down** buttons of the **Customize Columns** window described above to change the order of the columns.

10.2 Button panel

Button Panel is a component of **TO3000, Version 10 Workstation** interface, located in its bottom part. It consists of six groups of buttons: **History**, **Jump**, **Open Folders**, **Local Custom Filter**, **Local Report**, **Global Date Filter**.

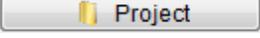
History buttons

Click  button to switch **TO3000, Version 10** to the previously visited tab or window.

Click  to return to the tab or window which was opened before you clicked .

Jump buttons.

Click  to jump to the relevant **Client** window of the current client.

Click  to jump to the relevant **Project** window of the current project (with *Projects Mode* only).

For example, open **Invoices to Clients** window and select an Invoice. If you click  button, you will jump to Invoices tab of the client, to whom the selected invoice belongs.

Open Folders buttons.

Using **Open Folders** drop-down list you can easily switch between the folders opened during the current **TO3000, Version 10** working session. Any folder you open using **TO3000, Version 10** (using **Explore** buttons) is automatically added to the list. When you need to switch, just select the necessary folder in the drop-down list and click **Go** button.

Local Custom Filter buttons.

Use **Local Custom Filter** buttons to construct filter conditions, thus simplifying the search of necessary records in your **TO3000** database.

Local Custom Filter is available only when **TO3000, Version 10** is switched to the **Main** tab of the **Client**, **Project**, window.

Edit button opens Edit Filter window.

 **Note:** Conditions can be set on the Custom Fields as well.

On/Off button switches on/switches off the filter correspondingly.

Recent button switches on the last created filter.

Local Report buttons.

Local Report buttons give you possibility to save the content of **TO3000, Version 10** window currently displayed (save it in a separate file of defined format or print).

Export button opens Export window, where you can choose the desired format of output file.

Print button opens the **Preview** of the document you are about to print.

See also: Exporting TO3000, Version 10 data

Global Date Filter buttons

Global Date Filter buttons are designed to filter records according to user defined date conditions.

Edit button opens Edit Global Date Filter window.

On/Off button correspondingly switches on/switches off the date filter.

Recent button switches on the last created data filter.

See also: Global Date Filter.

See also:

User Interface

Menu Bar

Navigation panel

10.3 Navigation panel

Navigation panel is a part of TO3000, Version 10 user interface simplifying and quickening navigation in the program.

It consists of four groups of icons: **Clients** and **Projects**, each containing icons for accessing **Clients**, or **Projects**, related window correspondingly.

You can hide navigation panel to free display space by clicking left edge of the screen.

Use menu **Navigation** to switch between **Classic** and **Modern** style of navigation bar.

Client group of icons



Client window displays all information about the taken **Client**. Client data is broken down by the following tabs: **Main**, **Contacts**, **Marketing**, **Prices**, **Quotes**, **Projects**, **Client Jobs**, **Invoices**, **Payments**, **Balance**, **Files**, **Info**, **Schedule**.

See also: Client window



General Prices for Clients window provides access to general price list: each **Price** representing a rate in chosen **Currency** for certain **Service** (language pairs, translation, proofreading etc).

See also: General Prices for Clients window.

See also: Services

See also: Group of Services

See also: Discounts/Markups



Quotes to Clients window provides access to all currently created **Client Quotes**. This window can be used create a new **Project** based on a **Quote**, add/edit/delete **Draft Client Jobs** for existing **Quotes**.

See also: Quotes to Clients window



Invoices to Clients window provides access to all currently issued **Invoices**. Use this window to calculate **Invoice** totals, view and edit invoices, print any of these invoices.

See also: Invoices to Clients window



Payments from Clients window lists all **Payments** received from all **Clients**. Use this window to calculate **Payment** totals, link **Payments** with **Invoices**, edit and delete **Payments**.

See also: Payments from Clients window



Balance of Clients window displays a simplified balance sheet broken by **Clients** based on **Payments from Clients** and **Invoices to Clients**. Accounting staff can use this window to identify which Client's accounts require attention.

See also: Balance of Clients window



Client Folders window can be used to access Client files and folders. The window is analogical to **Microsoft Windows Explorer** window, though its scope is limited to **Clients** folder, which is located in **C:\Business** unless other specified in **Advanced Settings** of **TO3000, Version 10**.

See also: Client Folders window



Schedule of Projects (Schedule of Client Jobs) window displays block diagram of all **Projects (Client Jobs)** for the specified period. **Schedules** are grouped by **Clients**.

See also: Schedule of Projects window

See also: Schedule of Client Jobs window

See also: Using Schedules

Project group of icons (with Projects Mode only)



Project window displays all information about each of the **Projects**. Project data is broken down by the following tabs: **Main**, **Tree**, **Client Jobs**, **Files**, **Info**, **Schedule**.

See also: Project Window



Client Jobs window displays the list of all **Client Jobs** stored in database. With the help of this window you can have a quick overview of all **Client Job** statuses, calculate **Client Job** totals, edit and delete **Client Jobs**.

See also: Client Jobs window



Project Folders window can be used to quickly access Project files and folders. The window is analogical to **Microsoft Windows Explorer** window, though its scope is limited to **Project** folder, which is located in **C:\Business** unless other specified in **Advanced Settings** of **TO3000, Version 10**.

See also: Project Folders window



Schedule of Projects window displays block diagram of all **Projects** for the specified period.

See also: Schedule of Client Jobs

See also:

TO3000, Version 10 User Interface

10.4 Local custom filter

Local custom filter can be used to filter data in [TO3000, Version 10](#) tables by certain columns. Filters are most commonly used as search tools.

To create or configure local custom filter click **Edit** button and adjust filter conditions. Once the filter has been turned *On*, all rows in the table which do not match filter parameters will be hidden.

You can apply last used filter by clicking **Recent** button.

Filter settings can be saved for re-use in the future without the need to set up filter parameters again.

Creating a filter

1. Click **Edit** button in the **Local Custom Filter** area at the bottom of [TO3000, Version 10](#) window or press *Ctrl+F* buttons.

2. Click on the **<Click here to add condition>** string or click **Add** button to add a new condition line. Each condition has the following elements:

- *Field (column) name*. By default the name of the first column of this table in database is displayed. Click to select a different column.

 **Note:** Custom fields are available in these lists as well.

- *Condition*. It depends on the type of data which is stored in selected column. These may include: "*contains*" (for text columns like **Name**), "*greater (or less) than*" (for numeric columns like **Total**), "*not empty*" and other.

- *Condition value*. This is the parameter being searched or filtered. Click the **<?>** string to set the parameter for the selected field.

 **Note:** To filter by property which has two possible values: "*Yes*" or "*No*" please select "*is equal to*" "*0*" to display records which has "*No*" value of this property and select "*is equal to*" "*1*" to display records which has "*Yes*" value of this property.

3. Click **OK** to switch on the filter or click **Save** button on the right first to save this set of conditions (so that you will not need to recreate it next time you want to select the item basing on such conditions).

See also:

Global Date Filter

10.5 Global date filter

Global date filter can be set to display only those records in the database that match certain time parameters. For example you can set global date filter to display only records for certain year, quarter, month or to specify a custom time interval.

Please be advised that *Global date filter* effect is not limited to certain window. Once applied, it works in all date-relevant records.

The following areas are affected by global date filter:

Clients:

- **Client** window tabs: **Marketing, Quotes, Projects, Client Jobs, Invoices, Payments** and **Balance**.
- **Quotes to Clients** window.
- **Client Jobs** window.
- **Invoices to Clients** window.
- **Payments from Clients** window.
- **Balances of Clients** window.

Projects (with *Projects Mode* only):

- **Project** window tabs: **Main, Tree, Client Jobs**.
- **Client Jobs** window.

To apply a *global date filter* click **Edit** button at the bottom right corner of the **TO3000, Version 10** window.

To switch on the last used filter click **Recent** button.

 **Note:** *Global date filter* affects the whole database. If you change it in one tab or window, it will change globally throughout **TO3000, Version 10** database.

 **Note:** *Global date filter* setting is saved when you close the program and will be used next time you run **TO3000, Version 10**.

See also:

Local Custom Filter

TO3000, Version 10 User Interface

10.6 Right-click menu

Customize Columns and Vertical View

You can hide or display any column in any table with the help of **Customize Columns** option. This can be done with any table including clients and projects lists on the **Main** tabs of **Client** and **Project** windows.

1. Right-click anywhere on the table. Select **Customize Columns** option in the context menu.
2. Select check boxes in front of the names of the columns you want to display and clear those you want to hide. To restore default columns, click **Default**.

 **Note:** By default some columns are not shown in some of the tables. In case you cannot find certain information in a table, please check if required column can be activated with the help of **Customize Columns** option.

Vertical View window offers a quick summary of selected table row. This is especially useful in tables with a lot of columns (for example **Client Jobs** table with a lot of custom columns).

Export

On the **Main** tabs of **Clients** and **Projects**, windows when you right-click on the correspondent items list (**Clients** list, **Projects** list etc.) the expanded "right-click menu" appears containing two more commands: **Export to TXT** and **Export to CSV**. For example:

See also:

TO3000, Version 10 Interface

10.7 Menu bar

Navigation

Navigation menu can be used to quickly access any window or tab of **TO3000, Version 10**. **Navigation** menu structure is identical to that of Navigation panel

Client and **Project** commands include a submenu to the right, which gives access to the tabs of the correspondent window.

Navigation menu can also be used to change the style of navigation panel. **Classic** command will change the navigation bar to the one used in previous versions.

New...

New... menu can be used to quickly create new client and contact records in **TO3000, Version 10** database. This menu has the following items:

- **Client** – this option can be used to quickly add a new *client* record to database.
- **Contact** – this option can be used to quickly add a new *contact* of a *client*.
- **Service** – this option can be used to quickly add a new *service* to database, and assign general prices for this service.
- **Quote** – this option can be used to quickly issue a new *quote* to selected *client*.
- **Job** – this option can be used to quickly create a new *job*.
- **Invoice** – this option can be used to quickly issue a new *invoice* selected *client*.

Custom Reports

Custom Reports opens the list of *custom reports* available. Click on it to open the **TO3000, Version 10 Reports-View** window containing the list of reports you can generate. See Custom Reports topic for details.

Settings

Settings menu provides access to options and configuration.

- **Business** command opens Business Settings window. Use it to configure such aspects of the program as currencies and services lists, discounts, taxes and payment methods.
- **Personal** command opens Personal Settings window. Use it to configure **AnyCount** options, customize interface view, and to create or edit document templates.
- **Advanced** command opens Advanced Settings window. Use it to set your base currency, customize invoice codes, folder options. Advanced settings window can also be used to create custom fields, queries and reports.
- **Database** command opens Database Settings window. Use this window to perform regular maintenance to your database file, such as backup and quick optimization operations.

- **Workflow Mode** command opens Workflow Mode window. Use this window to choose *With Projects* or *Without Projects Mode*
- **Language** command allows you to choose an appropriate TO3000 interface language. To apply changes, it is required to restart the software.

Help

Help menu contains links to this help file, support and contacts, registration options, including:

- **TO3000 Help** command opens this [TO3000, Version 10 Help System](#).
- **TO3000 on the Web** - shortcut to <http://www.to3000.com>
- **Technical Support** - shortcut to <http://www.aithelp.com/TO3000Support> Use this option to contact [TO3000, Version 10](#) support team.
- **TO3000 Newsletter** - shortcut to TO3000 newsletter subscription form at <http://www.to3000.com/newsletter.html>
- **Check for Updates** command opens **Checking for Updates** window. See Check for Updates.
- **System and Locale Info** displays **System Information** window with your system and locale information, which could be useful in case of writing to customer support.
- **Register** command (which changes to upgrade after you register the program) shows registration dialog, where you can enter your [TO3000, Version 10](#) license key when registering the program.
- **About TO3000** command displays version and build information of your TO3000, Version 10

See also:

TO3000, Version 10 user interface

Custom reports

Business settings

Personal settings

Advanced settings

Database settings

11 Settings

TO3000, Version 10 settings are divided into four distinct groups:

Business Settings;

Personal settings;

Advanced Settings;

Database settings.

11.1 Business settings

To open **Business Settings** window:

1. Click menu **Settings > Business** command.
2. This will open **Business Settings** window with the following sections:
 - **Groups of Services** — these used in price, quote and job records.
 - **Services** — each group contains a separate list of services (most commonly these are language pairs). Also used in price, quote and job records.
 - **Volume Units** — in addition to standard volume units you can add custom units to account prices, quotes and jobs in.
 - **Currencies** — currencies can be added from here.
 - **Exchange Rates** — set up exchange rates between your base currency and other currencies. These rates will be used to keep records in two currencies for your clients.
 - **Taxes** — taxes are used in invoices. You can add or edit taxes here.
 - **Discounts/Markups** — add or edit discounts and markups here. Once added, these can later be inserted into invoices.
 - **Countries** — by default database contains the list of all countries (used in client profiles). This list can be edited here.
 - **Payments Methods** — payment methods and their descriptions can be added to invoices.
 - **Categories** — add or edit categories which are used in Info tab.

See also:

Personal settings

Advanced settings

Database settings

11.1.1 Groups of Services

On **Groups of Services** tab you can specify the kinds of services (groups of services, in other words) you offer to your clients (e.g. translating, editing etc.). When creating jobs or setting prices in [TO3000, Version 10](#) you will have the possibility to specify the group of services, selecting it from the list created here.

Groups of Services tab is displayed automatically when **Business Settings** window opens.

To create a new *group of services* click **New** button and enter the name of the *group* in the **New Service Group** window displayed (50 characters maximum).

Group of services cannot be deleted if it has any services in it.

See also:

Personal settings

Advanced settings

Database settings

11.1.2 Services

On the **Services** tab of the **Business Settings** window tab you can enter a list of services you offer to your clients; (e.g. translating from English to French). While creating jobs or setting prices in **TO3000, Version 10** you will have the possibility to specify the services, selecting it from the list created here.

To open **Services** tab click **Services** in the left part of the Business settings window.

Each *service* belongs to a *group of services*.

To add a new *service* click **New** button, select a group of services and enter service name (50 characters maximum).

Service cannot be deleted if it is used in any price, quote or a job.

See also:

Personal settings

Advanced settings

Database settings

11.1.3 Volume Units

On the **Volume Units** tab of the **Business Settings** window you can create and manage the list of volume units, which you will use for entering jobs volumes.

To open **Volume Units** tab click **Volume Units** in the left part of the Business settings window.

To add a new custom volume unit, click **New** button, and enter the name of the unit. If the unit you are creating consists of words/characters (with or without space) and you want to use it for text counting with built-in AnyCount:

- select **Used by AnyCount** option;
- specify if it consists of words/characters (with or without spaces) selecting the correspondent option and number of words/characters in the new unit. (For example, volume unit "lines" can consist of 55 characters without spaces).

If the unit does not refer to texts volume, e.g. "hours", leave **Used by AnyCount** option unselected.

See also:

Personal settings

Advanced settings

Database settings

11.1.4 Currencies

On the **Currencies** tab of the **Business Settings** window you can create and manage the list of currencies, which you will be able to use in all **TO3000, Version 10** financial records. To open **Currencies** tab click **Currencies** in the left part of the Business settings window.

To add a new currency click **New** button, enter the 3-letter abbreviation for the new currency in **New Currency** window and the description of the currency (i.e. long name, 50 characters maximum) in the corresponding fields. For example:

See also:

Personal settings

Advanced settings

Database settings

11.1.5 Exchange Rates

TO3000, Version 10 provides you with possibility to assign different *client currency* to each *client*, *expert currency* to each *expert*, and still, be able to see 'the whole picture' using your *base currency* . (*Base currency* is set on the General section of **Advanced Settings** window)

On the **Exchange Rates** tab of the **Corporate Settings** window you can specify the exchange rates between your *base currency* and other currencies used.

To open **Exchange Rates** tab click **Exchange Rates** in the left part of the Business settings window.

To create a new exchange rate record click **New** button, select required foreign currency from the drop-down list and specify the rate.

 **Note:** The currencies list consists of currencies added on the Currencies tab of the Business settings window.

See also:

Multi-Currency Support

Personal settings

Advanced settings

Database settings

11.1.6 Taxes

TO3000, Version 10 provides you with possibility to automatically consider taxes when issuing invoices.

You can specify taxes names and rates on the **Taxes** tab of the **Business Settings** window.

To open **Taxes** tab click **Taxes** in the left part of the Business settings window.

To add a new tax record click **New** button, and enter tax name (50 characters maximum) and value (rate) in the appropriate fields. Please note, that tax rate is entered in percentage.

See also:

Invoices to client

Personal settings

Advanced settings

Database settings

11.1.7 Discounts/Markups

TO3000, Version 10 provides you with possibility to add and automatically consider discounts and markups when issuing invoices.

You can specify discounts/markups names and rates on the **Discounts/Markups** tab of the **Business Settings** window.

To open **Discounts/Markups** tab click **Discounts/Markups** in the left part of the Business settings window.

Discount rate (value) should be negative; Markups are entered/edited in the same **New Discount/Edit Discount** window but must have positive value.

To create a discount or markup, click **New** button, enter *Discount/Markup* name and value (rate) in the appropriate fields. Please note that rate should be entered in percentage (but without the "%" sign).

See also:

Invoices to client

Personal settings

Advanced settings

Database settings

11.1.8 Countries

When creating a new *client* record in [TO3000, Version 10](#) you can enter postal address and specify the country selecting it from the drop-down list. On the **Countries** tab of the **Business Settings** window you can manage the list of countries mentioned above.

 **Note:** By default [TO3000, Version 10](#) database already contains almost exhaustive list of countries.

To open **Countries** tab click **Countries** in the left part of the Business settings window.

See also:

Client window > Main tab (adding new Client)

Personal settings

Advanced settings

Database settings

11.1.9 Payment Methods

Payment method is one of the many parameters that can be added to invoice when it is issued with **TO3000, Version 10**. Payment method contains details for performing the payment (bank details, for example).

You can create/edit/delete payment method records on the **Payment Method** tab of the **Business Settings** window.

To open **Payment Method** tab click **Payment Method** in the left part of the Business settings window.

To add a new payment method click **New** button, enter payment method name (150 characters maximum) and description in the corresponding fields.

See also:

Invoices to client

Personal settings

Advanced settings

Database settings

11.1.10 Categories

Categories settings allows to add, edit and remove custom types of info notes displayed on **Info** tabs of **Client** and **Project** windows.

See also:

Client window > Info tab

Personal settings

Advanced settings

Database settings

11.2 Personal settings

To open TO3000, Version 10 **Personal settings** window click menu **Settings > Personal** command.

For details on each tab of **Personal settings** see:

- **AnyCount** — settings of built-in **AnyCount 6.0** engine for counting various file types.
- **Colors: General** — interface color customization.
- **Colors: Status** — status colors settings for quotes, projects, jobs and invoices.
- **Fonts and Sizes** — text display customization.
- **Templates** — customization of RTF templates. See Templates topic for details.
- **Position of Custom Fields** — customization of custom fields's position.
- **Schedules** — customization of Schedules.
- **Customization** — additional customization of **TO3000, Version 10**.

See also:

Business settings

Advanced settings

Database settings

11.2.1 AnyCount

TO3000, Version 10 users can enjoy the built-in [AnyCount 7.0](#) — word, character and custom volume units count tool. It counts single or multiple files of all commonly used file formats:

You can specify [AnyCount](#) settings (general and specific for different files formats) on the [AnyCount](#) tab of the [Personal Settings](#) window.

[AnyCount](#) tab opens automatically when Personal Settings window opens.

Common options

When [Skip Numbers](#) check box is selected, [AnyCount](#) produces count omitting numbers in the documents.

If [Show Full Path](#) is selected, then in [AnyCount Notes](#) (which appear after you use [AnyCount](#) when creating [Client Job](#)) you will see the full path of the file counted.

File type specific options

To configure counting options for specific file types, click the tab with required file name. Different file type counting options can be configured.

 **Note:** You can perform counts of [.wpd](#) files only if you can open them with [Microsoft Word](#), i.e. you need special [Microsoft Word](#) packages for working with [.wpd](#) files to be installed.

See also:

[Creating Client Jobs](#)

[Business Settings](#)

11.2.2 Colors: General

To open **Colors: General** tab click menu **Settings > Personal** and click **Colors: General** in the left part of the window.

Use corresponding buttons to change the color of text and background for different parts of TO3000, Version 10 interface.

See also:

Colors: Status

Business Settings

11.2.3 Colors: Status

To make jobs and projects tracking more effective TO3000, Version 10 uses different colors to mark records with different status.

➔ **Example:** Black — the *job* is completed. Green — the *job* is not completed yet, deadline in the future. Blue — the *job* is not completed and due today. Red — the *job* is not completed and overdue.

You can change colors to mark off items status on the **Colors: Status** tab of the **Personal settings**.

To open **Colors: Status** tab click menu **Settings > Personal** and click **Colors: Status** in the left part of the window.

Use the corresponding buttons to open color panel and set the color for each status of quotes, current projects and jobs, outstanding invoices.

A color highlight warning for projects and jobs is even more customizable: you can specify how much in advance warning statuses are assigned.

See also:

Colors: General

Business Settings

11.2.4 Fonts and Sizes

On the **Fonts and Sizes** tab of the **Personal settings** you can set font and size of the text in TO3000, Version 10 tables.

To open **Fonts and Sizes** tab click menu **Settings > Personal** and click **Fonts and Sizes** in the left part of the window.

Select the font type and size from the corresponding drop-down lists.

Reset buttons sets the default value of font and size: MS Sans Serif, 8pt.

See also:

Business Settings

11.2.5 Templates

All documents issued in [TO3000, Version 10](#) can be saved in .rtf format and/or printed using corresponding .rtf templates in format.

All templates are stored in subfolders of [Templates](#) folder (by default: [\A\T\Translation Office 3000 V9\Templates](#)).

On the [Templates](#) tab of the [Personal settings](#) you can manage templates and folders inside the [Templates](#) folder.

To open [Templates](#) tab click menu [Settings > Personal](#) and click [Templates](#) in the left part of the window.

Tree filed displays the structure of templates folders. By default [Templates](#) folder contains three subfolders: [CLIENTS](#) and [PROJECTS](#).

File options

Template files, contained in currently selected folder are displayed in the field. All basic file operations can be performed with template files with the help of button set.

Address line displays path to the currently selected folder.

See also:

[Business Settings](#)

11.2.6 Position of Custom Fields

To fit your individual needs and add different kinds of additional information you can create custom fields of various types: *number*, *checkbox*, *string*, *text*, *date*, *time*, *date and time*, for each part — [Clients](#), [Projects](#) and [Business Expenses](#). Custom fields can be grouped by custom groups.

Custom fields can be added on Custom Fields section of **Advanced settings** window.

On the **Position of Custom Fields** section of the **Personal settings** you can design the view of custom groups (custom fields are grouped by) you create.

To open **Position of Custom Fields** tab click menu **Settings > Personal** and click **Position of Custom Fields** in the left part of the window.

Check **Top** option to place custom groups' tabs on the top of the tab.

See also:

Custom Fields

11.2.7 Schedules

This section of user settings covers the display of **schedules** for **clients** and **projects**: **projects** and **client jobs** are displayed in a graphical way allowing to see all pending, due/overdue projects and/or jobs at a glance.

Use **Schedules** tab of the **Personal Settings** window to select icon display options on the **Schedule** bars marking the **Projects** and **Client Jobs** in the **Schedules** of TO3000, Version 10:

Always — Icons are displayed on all **Schedule** bars:

Clients and their Projects	January 2008						
	1	2	3	4	5	6	7
Alter Ego Solutions	: philips_savvy_manual						
	: Training Schedule						

Never — No icons displayed on Schedule bars whatsoever:

Clients and their Projects	January 2008						
	1	2	3	4	5	6	7
Alter Ego Solutions	: philips_savvy_manual						
	: Training Schedule						

See also:

Using Schedules

11.2.8 Customization

This section allows to perform additional *customization* of TO3000, Version 10

Default time of Deadline in Client Jobs option allows you to choose default time which will be used in *deadlines* of *client jobs*. This option can be changed only in *Without Projects Mode*. In *With Projects Mode*, *deadline* of *client jobs* is set according to the appropriate *project's deadline*.

11.3 Advanced settings

Advanced settings can be used to manage more complex aspects of TO3000, Version 10, like global *codes*, folder settings, *database customization* and *custom report* building.

To access **Advanced Settings** click menu **Settings > Advanced**.

The following **Advanced Settings** are available:

- **General** Selecting or changing *base currency* for accounting, and postal address display format.
- **Codes** Viewing and editing of global **Project** and **Invoice** codes.
- **Folders** Settings for folder automation.
- **Salutation** List of default salutations, which can be automatically added to contact names.
- **Custom Fields** Used to customize database by adding custom fields for **Clients** and **Projects**.
- **Custom Variables** Used to create custom template variables, used for generation of .rtf files.
- **Custom Queries** Create custom queries to retrieve necessary data out of the database.
- **Custom Reports** Create custom reports to fit your reporting needs and requirements.
- **CATCount** Enabling and disabling **CATCount** feature and selecting **CATCount** units.

11.3.1 General

Changing base currency

To set **Base Currency**, click the **Base Currency:** button. The list of currencies available for selection can be configured with the help of Currencies section of Business settings.

Postal address format

Click **Postal Address Format:** button to change the order in which elements of postal address appear in printable documents. This will affect data displayed by `\CLIENT_ADDRESS\` variable.

Additional invoice options

By default you cannot delete invoice if the invoice with next code has been already issued (however in this case invoice can still be voided). To enable deletion of invoices in the middle of invoice range, select checkbox **Invoices in the middle of the range can be deleted**.

You can add field specifying invoice copy number by selecting **Enable numbering of Client Invoice copies** checkbox. This will enable **Number of copies** field in **Edit Invoice** window. Number specified in that field can be added to printed invoices with the help of `\INVOICE_COPY\` variable.

See also:

Business Settings

Personal settings

Database settings

Base Currency of your company

11.3.2 Codes

In TO3000, Version 10 "global" codes are used to identify *projects*, *clients*, and *invoices*. These codes are generated automatically each time the new project, client or invoice is created, and cannot be edited by users.

Setting Next Codes

Click **Next Codes** button to forcefully set the next **Global Code** which will be assigned to the next **Project** created and next **Invoice** issued.

 **Note:** Next code cannot be less than last code of this type in the database. Thus if you already have project with code 010, next project code cannot be set 10 or less (even if some projects were deleted).

Editing Global Invoice Code display format

Also you can customize the prefix and suffix of **Global Invoice Codes** and enable annual numbering resets.

To add prefix or suffix to invoice code, type it into Prefix or Suffix fields directly. If you wish to add date or year as prefix, use common Windows date code to specify the format in which date must be added to global invoice code:

Example:

YYYY - will render four digit year, while YY will result in two digit year;

MM - will result in month number;

DD - will add date to template.

Regulations in some countries may require resetting invoice counters each year. TO3000, Version 10 can be configured to start invoice counting anew each year, starting with the first invoice issued in a new year. Select **Enable annual numbering resets** checkbox to enable annual invoice code resets.

 **Note:** After **Enable annual numbering resets** is selected, these resets cannot be rolled back.

Codes in naming RTF files

Codes in naming of .RTF files options determine what code will be used when automatically generating names for invoice files, saved by TO3000, Version 10 in your Business folder. Either **Client-Specific** or **Global** code can be used.

See also:

Business Settings

Personal settings

Database settings

11.3.3 Folders

Location of *Business folder* as well as automatic folder creation options can be changed in TO3000, Version 10 with the help **Folders** section of **Advanced Settings** window.

To change location of Business folder:

1. Click menu **Settings > Advanced**.
2. Click **Folders** section.
3. Click **Change** button.

Additional folder settings

To add custom subfolders to Client or Project folders, open respective tab (**Client Folder**, **Project Folder** (*With Projects Mode* only) or **Client Job Folder** (*Without Projects Mode* only), and create required folders there. Any folders added to folder structure this way will be automatically added to each new Client or Project folder.

To disable automatic creation of **Client** or **Project** folders, clear **Automatic Folder Creation** check boxes on **Client Folder** or **Project Folder** tab.

See also:

Business Settings

Personal settings

Database settings

11.3.4 Salutations

Salutations will be automatically added to contact names in your invoices. Use **Salutations** section of the Advanced settings window to add new salutations or modify existing ones.

Salutations are assigned to contacts on the **Contacts** tab of **Client** window. See Creating contacts topic for details.

To edit salutations:

1. Click menu **Settings > Advanced**.
2. Click **Salutations** section.

See also:

Business Settings

Personal settings

Database settings

11.3.5 Custom Fields

TO3000, Version 10 supports database structure customization in the form of adding custom fields to certain tables in database. Custom fields can be added with the help of **Custom Fields** section of the **Advanced Settings** window.

 **Note:** You can create custom groups of fields as well and variables for using custom fields value in your .rtf templates!

To edit custom fields:

1. Click menu **Settings > Advanced**.
2. Click **Custom Fields** section.

The following data can contain custom fields:

1. *Clients*:

Main tab of **Client** window (Client profile)

Quotes to Clients

Client Jobs

Invoices to Clients

Business Expences

2. *Projects* (**Main** tab of **Project** window only)

Creating groups of custom fields

1. Select the table to which a new custom field must be added.
2. Click **New** button in the group of fields control buttons.
3. Specify the name for new **Group of fields** in the **New Custom Group of fields** window.
4. Click **OK** to save changes or click **Cancel** to discard.

To **edit/delete Group of fields** select it from the list and click **Edit** or **Delete** button correspondingly from the upper button row.

 **Note:** To be able to delete the **Group of fields** you need to delete all **Custom Fields** it contains first.

To change the order of the **Group of fields**, i.e the order of tabs with the **Custom Fields**, use **Move Up/Move Down** buttons.

Creating custom fields

1. Select the necessary **Group of fields** (if you have created more than one).

2. Click **New** button from the lower row of buttons:
3. Fill the fields of the **New Custom Field** window:
 - Enter the name of the new **Custom Field** in the **Name** text box.
 - Select the data type of the new **Custom Field** from the **Type** drop-down list.
 - Enter the name for the variable that will possess the value of the new **Custom Field**; you will be able to use this variable in the .RTF templates.
See also: Templates
 - Click **OK** to add the specified **Custom Field** or click **Cancel** to discard.

To move the **Custom Fields** to another **Group of fields**, i.e. another tab, click **Change Group** button, point with the mouse arrow at the target **Group of fields** (the **Group of fields** records become yellow when you point at them, and click on it once.

To confirm all changes you have made with the **Custom Fields** click **Confirm Changes** button.

To cancel all changes click **Cancel** button.

The new custom fields appear on the **Custom** tab of the respective **TO3000, Version 10** windows.

See also:

Business Settings

Personal settings

Database settings

11.3.6 Custom Variables

On the **Custom Variables** tab of **Advanced Settings** window you can create global custom variables, which may be used afterwards in any .rtf template.

➔ **Example:**

If you enter EMAIL as a name of the variable and info@marsonlymars.com as a content, you will be able to use \EMAIL\ variable inside all your .rtf templates.

To edit custom variables:

1. Click menu **Settings > Advanced**.
2. Click **Custom Variables** section.

See also:

Business Settings

Personal settings

Database settings

Templates

11.3.7 Custom Queries

SQL-versed users can extract any data directly from [TO3000, Version 10](#) database with the help of custom queries. Information extracted with the help of queries can be exported in common file formats like XLS, CSV, HTML, PDF.

To access custom queries:

1. Click menu **Settings > Advanced**.
2. Click **Custom Queries** section.

Custom Queries section displays the list of available queries. Double-click any of the queries in the list to open this query **Query Builder** window for editing.

Exporting and printing query results

To *export* the data gathered by a certain query, select this query and click **Export Data** button. This will run currently selected query and prompt you to select the format of output file.

To *print* the resulting data of a query, select it and click **Print Data** button. This will open **Print Preview** window. Click **Print** button to sent the query results to chosen printer.

Loading and saving queries

Queries can be saved to and loaded from a special .pxq files.

To save query in a .pxq file, select it and click **Save** button. Enter name of the file and click **Save** button.

To load a query from a .pxq file, click **Load** button and use **Open TO3000, Version 10 Query** window to locate the required pxq file.

See also:

Business Settings

Personal settings

Database settings

Custom Queries

11.3.8 Custom Reports

Custom reports can be created edited and deleted with the help of **TO3000, Version 10 Advanced settings** window.

To manage custom reports:

1. Click menu **Settings > Advanced**;
2. Click **Custom Reports** section to open *custom report* management options.

Custom report options

The following options are available for custom reports:

- **New\Edit\Delete** buttons can be used to create\modify\delete the selected report.
- **Edit Details** button provides access to the **Edit Custom Report** window where you can change report name and description.
- **Example: View/Set/Clear** buttons: use **Set** button to specify the date interval for the sample of selected report displayed when the report is accessed in **TO3000, Version 10** menu **Custom Reports > List**. Use **View** button to see this sample and **Clear** to delete it.
- **Preview** button opens the **Preview** window where you can see how the selected report would look on paper and print it if needed.
- **Load** and **Save** buttons will allow you to download new reports from *.PXR2* report files (*importing*) and save the existing reports to *.PXR2* files for (*exporting*).

 **Note:** Custom reports which are displayed in **Custom Reports** section of **TO3000, Version 10 Advanced settings** window, are the ones currently integrated into **TO3000, Version 10** database. *PXR2* files are used solely for export-import purposes, thus deleting *PXR2* file from *VAIT\Translation Office 3000 V9\Admin\Reports* will not delete any of the reports in database.

Exporting a custom report

To *export a custom report*, save required report in *.PXR2* file. This file can later be imported into another **TO3000, Version 10** database.

1. Select the required *custom report* in the list.
2. Click **Save** button.
3. Specify name and location for *PXR2* file being saved.

Importing a custom report

You can import a custom report to your database from a *PXR2* file.

To *import a custom report*, use *PXR2* file to load required report.

1. Save *PXR2* file being imported to `\\AIT\Translation Office 3000 V9\Admin\Reports\` folder.
2. Click **Load** button.
3. Locate *PXR2* file being imported, select it and click **Open** button.

Editing a custom report

To make changes to a custom report, select this report in the list and click **Edit** button. This button opens the **FastReport** window (report designer interface).

FastReport designer is a complex tool intended for IT specialists. It requires some basic *SQL* and *Delphi* knowledge. Step-by-step creation of simpler reports is described in Example: creating a report topic.

For detailed information please visit the [Fast Report Inc.](http://www.fast-report.com) Internet site: <http://www.fast-report.com>

Setting up a report example

Once a new report has been added to reports list, you can access this report by clicking menu **Custom Reports > List**. Unless it has a pre-set example, however, the preview field to the right will remain blank.

Click **Set** button of the **Custom Reports** section of **TO3000, Version 10 Advanced settings** window to set a new preview example of currently selected report .

Click **View** button to view current example of currently selected report.

Click **Clear** to delete current example of currently selected report.

See also:

Business Settings

Personal settings

Database settings

Viewing custom reports

Managing Custom Reports

Example: creating a report

11.3.9 CATCount

CATCount can be enabled or disabled in [TO3000, Version 10](#).

To manage CATCount:

To enable CATCount select **Enabled** option.

 **Note:** When this feature is enabled, **CATCount** button appears in **New Client Job (Edit Client Job)**, and **New/Edit Client Quote**.

To change the units CATCount will use click **Change** button and select the necessary units from the list in the **Select Unit** window.

Units displayed in this list can be edited/deleted or added on the Volume Units section of the **Business Settings** window of [TO3000, Version 10](#).

See also:

Business Settings

Personal settings

Database settings

CATCount in [TO3000, Version 10](#)

11.4 Database settings

Database settings window is used to perform maintenance operations over **TO3000, Version 10** database.

TO3000 Database string displays full path to **TO3000, Version 10** database file, which is normally located at `\\AIT\Translation Office 3000 V9\db\TO3000.fdb`

Database Version string displays the version of **TO3000, Version 10** database. Version number consists of program version (9.70.0) and major/minor version of database. Use this string for reference when manually updating database version with the help of database update scripts.

Disk Space Left string displays the information about the free space left on the disk, where **TO3000, Version 10** database is located.

The following options are available in the **Database settings** window:

- Backup Quick back up of your database into a file, automatically signed with date and time of backup. It is recommended to back up your database often.
- Quick Optimization Automatic optimization of database structure. Use this procedure if database of your **TO3000, Version 10** seems to be running slower than usual.
- Restore Automatic restoration of **TO3000, Version 10** from a backup file.
- Run Update Script Manual update of database version.
- Check Integrity Run this procedure in case the program often displays *check integrity error messages*.
- Repair Use a backup copy of your database file to repair database structure.

See also:

Business Settings

Personal settings

Advanced settings

11.4.1 Backup

It is recommended to perform regular backups of [TO3000, Version 10](#) database. You can perform backup of the database at any time by clicking **Backup** button on the **Database Settings** window of the [TO3000, Version 10](#).

To perform a *backup* operation:

1. Click menu **Settings > Database**;
2. Click **Backup** button on the **Database** tab of [TO3000, Version 10](#);
3. Specify the location of backup file by clicking **Select** button;
4. Enter backup file name in the **Backup File** field;
5. Click **OK** button to begin backup operation.

See also:

[Business Settings](#)

[Personal settings](#)

[Advanced settings](#)

11.4.2 Quick Optimization

Quick Optimization operation frees up the unused space in the database file which may improve performance on some systems. This operation can be performed from the **Database Settings** window of *TO3000, Version 10*.

To perform a *quick optimization*:

1. Click menu **Settings > Database**;
2. Click **Quick Optimization** button on the **Database Settings** window of *TO3000, Version 10*;
3. Click **Yes** and wait for the **Quick Optimization** process to complete.

Need for optimization may vary depending on the number of records in database and number of everyday writes to database, but running **Quick Optimization** at least once a week is a good practice.

 **Note:** quick optimization is performed automatically during **Backup** command. If you do backups regularly, there is no need to run quick optimization.

See also:

Business Settings

Personal settings

Advanced settings

11.4.3 Restore

Restore command is performed to restore the database which you have saved in the backup file created earlier (by running **Backup** command).

To *restore your database* from a backup file:

1. Click menu **Settings > Database**;
2. Open your *database folder* (its address is displayed in **TO3000 Database:** information string) and rename (or delete) your current *TO3000.fdb* file.
3. Click **Restore** button on the **Database Settings** window of *TO3000, Version 10*.
4. Click **Select** button in **Restore Database** dialog and locate required backup *.FBK* file (by default these files are stored in *\\AIT\Translation Office 3000 V9\Admin\Backups*) and click **OK** to begin restore operation.

 **Note:** As a security measure, **Restore** command requires you to move away existing database from database path (*\\AIT\Translation Office 3000 V9\db\TO3000.fdb*) first.

See also:

Business Settings

Personal settings

Advanced settings

11.4.4 Run Update Script

In some cases, when you update your [TO3000, Version 10](#), database needs be updated as well. Usually database version is automatically updated during [TO3000, Version 10](#), however there may be exceptions. In this case database can still be updated manually by running a *database update script*.

Update scripts are always installed together with [TO3000, Version 10](#) and can be found in `\\AIT\Translation Office 3000 V9\Admin\DBUpdates\` folder in the form of *.T3U* files.

To *update database* using a database update script:

1. Click menu **Settings > Database**;
2. Click **Run Update Script** button from the **Database Settings** window.
3. Locate the script which updates your current database version to next version. Current database version is displayed in **Database Version:** string on the **Database Settings** window. Repeat update operation until you have most current database version.

➔ **Example:** Installed database version is 9.59.0 and software update requires 9.70.0 database version. In this case you need to consecutively run two updates (first *dbx59to60.t3u* and then *dbx69to70.t3u*).

 **Note:** [TO3000, Version 10](#) does mandatory backup before each database update operation, for maximum security of data in case anything goes wrong during the update.

See also:

Business Settings

Personal settings

Advanced settings

11.4.5 Check Integrity

Run Check Integrity operation in case [TO3000, Version 10](#) displays *check integrity error messages*.

To run check of your database for integrity:

1. Click menu **Settings > Database**;
2. Click **Check Integrity** button.

See also:

Business Settings

Personal settings

Advanced settings

11.4.6 Repair

Repair operation attempts to repair database integrity using a "healthy" database file copy. Perform **Repair** operation in case you are receiving errors after running Check Integrity command.

File for repairing must be created by manually copying database file *VAIT\Translation Office 3000 V9\db\TO3000.fdb*

To repair your database structure with the help of backup database file copy:

1. Click menu **Settings > Database**;
2. Click **Repair** button.

As a security measure, *TO3000, Version 10* cannot run any repairs on the original location of the *TO3000, Version 10* database (*VAIT\Translation Office 3000 V9\db\TO3000.fdb*). You should copy the database to some other location before running **Repair** command.

3. Specify the location of the database copy by clicking **Select** button.

 **Note:** One way to obtain a copy of your database file is to rename or move your current *TO3000.fdb* file and run Restore operation. After the process has been completed, move the restored *TO3000.fdb* file to *VAIT\Translation Office 3000 V9\Admin\Repair* folder, return your current *TO3000.fdb* to *VAIT\Translation Office 3000 V9\db* folder, and attempt repair operation.

 **Note:** If **Repair** fails, the only alternative is to restore database from most recent backup, therefore it is important to backup often.

See also:

Business Settings

Personal settings

Advanced settings

11.5 Workflow Settings

Workflow Modes is used to choose a workflow mode used in TO3000, Version 10. There are two modes available:

- **With Projects Mode.** This workflow mode allows to group jobs in a project.
- **Without Projects Mode.** This workflow mode allows to work with jobs without necessity to create a project.

See also:

Workflow Modes

With Projects Mode

Without Projects Mode

Common workflow

11.6 Language Settings

Language Settings allows to choose a *language* of TO3000 user interface. After choosing a *language* it is required to *restart* the software.

12 Clients

12.1 Client window

Client window can be used to view, edit and enter new information about your *clients*, as well as to manage their *client jobs* and *job assignments* as well as some *marketing* and *financial* information, like *prices*, *quotes* and *invoices* of your *clients*.

To open **Client** window click **Client** shortcut from the **Clients** tab of **Navigation** panel or by clicking **Client** command from the **Navigation** menu.

Client Window tabs

Different tabs of **Client** window represent different aspects and elements of your clientele database. Client data is broken by the following **Client** window tabs::

- Main tab — contains profiles of your clients. Client records can be created and marked as completed here. This tab also contains client profiles.
- Contacts tab — lists contacts of the selected client. New client contacts can be added here.
- Marketing tab — contains marketing information added by your sales representatives or marketing staff.
- Prices tab — holds individual price list of selected client. Here this client's prices can be created and edited.
- Quotes tab — is used for issuing and managing quotes offered to the selected client.
- Projects and Client Jobs tabs — these tabs contain projects and client jobs of the selected client.
- Invoices and Payments tab tabs — these tabs hold all invoices issued and payments made of the selected client. Here invoices are created, and linked with payments.
- Balance tab — provides the most basic overview of financial accounts of the selected client.
- Files tab — this tab is used for accessing selected client's files and folders.
- Info tab — is used for adding various client-related notes.
- Schedule tab — displays schematic schedules of projects and client jobs of the selected client.

12.1.1 Client profile

Main tab of **Client** window can be used to manage your database of clients. It contains the list of all clients and their profiles.

Browsing clients

You can search clients by name with the help of **Starts with** and **Contains** filters. Select **Starts with** option and enter first few letters of client's name in the field, and the cursor will jump to highlight first matching client's name in the list. Select contains option and enter any part of client's name being searched.

- Click any client in the list to view profile of this client to the right.
- Double-click any client in the list to edit their name, client code and change client currency.
- Once a new client has been added, their data can be edited in this client's profile.
- You can create a new client record based on data (profile, marketing, contact or pricing) of one of the existing clients by cloning this client. To do so, select a client to clone, and click **Clone** button. For more information please refer to Cloning a Client topic.

Clients are listed in the form of table. Although by default it contains single column (**Name**), you can add your custom fields to view by right-clicking the client list and then clicking **Customize Columns** in the context menu.

 **Note:** Due to filter operation (like *local custom filter* and *global date filter*) you may not be able to see all the clients in the database. **Summary** at the bottom of clients list displays if all the clients are shown. Please refer to Local Custom Filter topic for more details on filters and access restrictions.

Client profile

On the right side of the **Main** client tab, you have two tabs: **Client Profile** and **Custom**, which enable you to review and modify the client's information. Click appropriate button to add or edit client profile information:

- **Client code** — click this button to enter or change the client's code (15 characters maximum). This is the same code, which had been assigned, manually or automatically, when creating the new client record. This code is also used for naming client folders as well as in codes for Invoices and quotes.
- **Name** — click this button to edit this *client's* name. This name can be up to 150 characters long.
- **Postal Address** — click this button to add or change a postal address of the client. See Postal Address of Client topic for details.
- **Contact Info** button — allows you to add or change contact information of the client. See General Contact Information topic for more details.

- **Web site** — opens **Edit Website of Client** dialog box, providing field for entering a web site address (URL) of your client. Click **Go** button to open this site in your Internet browser. Web site address can be up to 120 characters long.
- **Payment Terms** — allows you to specify payment terms for each client, and their minimum fees. According to these **TO3000, Version 10** will determine if your invoices to client are outstanding, overdue or will be due soon. See **Payment Terms of Client** topic for more details.
- **VAT Number** — enter client's legal tax number to have it automatically displayed and printed on invoices.
- **Client Folder** — this part of **client's profile** can be used to quickly create client's folder and access client files. Click **Create** button to automatically create a folder, tied to this client. **Explore** button becomes active only after client folder has been created. Click it to open the client's folder in the Windows Explorer window. Use menu **Settings > Advanced** to change location of Business folder.
- **Client Currency** — this currency will be used to issue **quotes** and **invoices** to this client, and to record **payments** from this client. All the financial records for this client are kept in both your base currency and client currency, converted according the exchange rates you set.
- **Next Codes** — click this button to edit the automatic counters for client-specific codes of quotes, client jobs, invoices and payments. **TO3000, Version 10** will use the codes for the next quote, client job, invoice and payment you create. You can only increase the next code value. See **Next Client Codes** topic for more details.
- **Locale Format** — different clients usually have different requirements to displaying dates, numbers and monetary values. Locale format settings are used to configure this format individually for each client. These formats will then be applied to printable invoices. See **Locale Format of Client** topic for more details.
- **Invoicing Policy** — by adjusting invoicing policy you determine conditions upon which **TO3000, Version 10** will prompt you to invoice client jobs. See **Invoicing Policy of Client** topic for more details.
- **General Information** — any additional information which did not fit into any of the other sections can be entered here.
- **FTP connections** — you can set parameters for access to FTP folders of this client. Shortcuts to these folders will be automatically added to **Files** tab this client's window. See **Client FTP Connections** topic for details.

Custom data of client

Client database can be customized by adding custom fields. Any custom fields that have been added to clients database, can be accessed by clicking **Custom** tab, next to the **Client Profile** tab.

See also:

Postal Address of Client

General Contact Information

Payment Terms of Client

Next Client Codes

Locale Format of Client

Invoicing Policy of Client

Client FTP Connections

Cloning a Client

12.1.1.1 Postal address of client

Postal address of client determines this client's country, and is automatically added to invoices and quotes sent to this client. The following postal address data can be added:

Street Address — two separate addresses, can be added. Each address entry can be each 50 characters maximum. When editing invoice and quote templates you can choose which of the two addresses invoice or quote contains.

City — maximum 40 characters long.

State — maximum 40 characters long.

Country — you can add additional countries to the list of countries in the **Postal Address of Client** window. See Countries topic for details.

ZIP Code — maximum 10 characters long.

See also:

Countries section of Business settings

Client Information Variables

12.1.1.2 General contact information

Clients in [TO3000, Version 10](#) have two types of contact information: general, and contact information of client's contact persons (Contacts of Client). General contact information of a Client can contain the following data:

E-mail (up to 2) — maximum 250 characters. **Send** button becomes active only if valid e-mail address is entered.

Phone (up to 4) and **Fax** numbers — maximum 250 characters each.

Notes — a plain text note, not limited by the number of characters.

General contact information of Client can also be added to templates with the help of Client Information Variables.

See also:

Countries section of Business settings

Client Information Variables

12.1.1.3 Payment terms of client

According to the payment terms of a client, [TO3000, Version 10](#) will keep track of unpaid invoices and update status of outstanding invoices: overdue, due today, due tomorrow, and so on.

With the help of [Edit Payment Terms](#) dialog you can configure payment conditions of selected client, including:

Minimum Fee — this is the minimum sum the invoices must accumulate, before they can be paid. Type 0 in this field to disable minimum fee condition.

You can also indicate if invoice should be paid within certain time (30, 45, 60, or 90 days) from the day it was sent (*invoice issue date*) or on certain day of certain month.

Select **Unknown/Other** to disable automatic payment terms control.

12.1.1.4 Next client codes

Codes of [quotes](#), [client jobs](#), [payments](#) and client-specific codes of [invoices](#) are generated automatically each time a new [quote](#), [client job](#), [payment](#) or [invoice](#) is entered into database. Prefix of these codes depends on client's name. The digits after — represent the counter code.

Although this code cannot be edited, you can advance the counter forward by specifying next code in the **Next Codes for Client** window.

The maximum value of the next code that can be entered in **Next Codes for Client** window is 999999. There is no technical limit to the maximum value the counter can reach.

To open **Next Codes for Client** window click **Next Codes** button in this Client's profile.

12.1.1.5 Locale format of client

Clients from different countries are very likely who have different locale format. There is no need to change your own locale format each time you print invoice for a client with locale format different from yours.

To have [invoices to clients](#) printed according to their own [Regional and Language options](#) (normally defined in [Windows Control Panel](#)), [TO3000, Version 10](#) can use separate locale format for each of your clients.

The following locale settings can be configured:

Negative Currency Format — these settings determine how negative amounts of money are displayed. For example, in some countries negative amount is indicated with a "minus" put before number: -100.00. In other countries negative amount must be written in brackets: (100.00).

Decimal Symbol — this is the character which separates decimals from the rest of the number. You can type the required character directly into the drop-down list. Any character you type will be added to the list for later use.

No. of digits after Decimal — [TO3000, Version 10](#) will round up all numbers in the documents to a number of decimals specified here. Set this parameter to 0 if the currency of a client does not have decimal units. Most commonly number of digits after decimal is 2.

Digit Grouping Symbol — this is the symbol which will be inserted between each three digits in the number, for example in the following number *1 000 000* digit grouping symbol is space.

Date Separator — enter character to separate day, month and year in date when it is displayed in short format. For example in the following date *3,31,2008* the date separator character is comma. Settings in **Date Separator** field will be automatically applied to **Short Date Format** field.

Short Date Format — this is format for the short date display (like *3,31,2008*). Enter required date format into this field or select one of the available formats using drop-down list. Use *d* to indicate day, *m* – for month, and *y* – one year. Date separator characters can be entered manually in this field too. Otherwise — settings from **Date Separator** field will be applied.

Long Date Format — these settings configure the display long date (like *Monday, March 31, 2008*). Use four *d* character to map day of the week name, four *m* characters – to map month and *y* to map year.

 **Note:** To map brief day or month ("*Mon*" instead of "*Monday*" or "*Mar*" instead of "*March*") enter 3 *d* or 3 *m* characters instead of four.

 **Note:** Full day or month names can be displayed in short date format by typing 3 or 4 characters in **Short Date Format** field.

To configure locale settings for certain [client](#), click **Locale Format** button in this Client's profile.

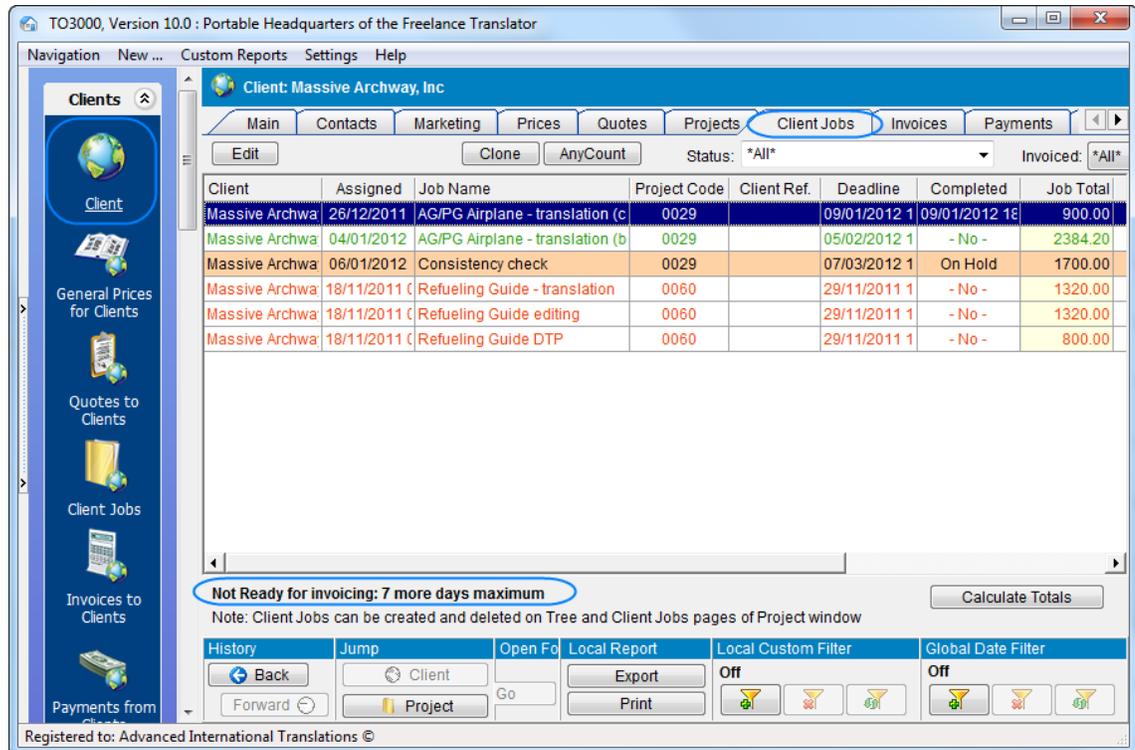
See also:

Date and Time Functions

12.1.1.6 Invoicing policy of client

Invoicing policy settings determine when TO3000, Version 10 alerts user to invoice a client job. According to these settings TO3000, Version 10 will assign one of the following statuses to uninvoiced client jobs: **Not ready for invoicing** or **Ready for invoicing**, following by comment, depending on the current *Invoicing policy settings*, for example, "**Total reached**".

These statuses can be viewed on the **Client Jobs** tab of **Project** window, **Client Jobs** tab of **Client** window and **Client Jobs** window.



By default *invoicing policy* for all the clients states that client jobs must be invoiced immediately after client job has been completed.

Invoicing policy can prompt you to invoice client jobs once their total has reached certain amount.

Select **Wait for accrual** check box, to enable time limit within which invoice must be created whether required total has been reached or not. This will make all client jobs display as "ready for invoicing" if specified amount of time has passes since their completion.

To configure your invoicing policy regarding certain *client*, click **Invoicing Policy** button in this Client's profile.

Note: If Invoicing policy is set to **Immediately after completing job**, then **Not ready for invoicing** or **Ready for invoicing**, message will not be displayed.

12.1.1.7 Client FTP connections

FTP (File Transfer Protocol) is common method of sharing and exchanging work files. Each client profile in *TO3000, Version 10* can have a number of FTP connections (addresses of shared folders) associated with this client. These folders can then quickly be accessed by any user working with Files tab of this Client.

FTP Connection in *TO3000, Version 10* allows quick access to specified FTP folder without having to re-type login and password each time you connect. The following details can be specified when creating connection:

Connection Name — this name has no syntax requirements and can be no longer than 50 characters.

FTP Server — address of FTP server (for example *ftp.server.com*). Can be no longer than 50 characters.

User Name — login, normally issued by FTP server administrator. This login will be used when *TO3000, Version 10* attempts to connect to FTP. Can be no longer than 50 characters.

Password — this password will be used when *TO3000, Version 10* attempts to connect to FTP. Password can be as much as characters long.

Passive file transfer option allows to enable passive mode for this connection. Please consult *FTP server administrator* regarding the type of file transfer you should use. If you are unsure, please leave **Passive file transfer** check box cleared.

To add edit or delete FTP connections of certain *client*, click **FTP Connections** button in this Client's profile.

See also:

FTP folders access

12.1.1.8 Cloning a client

In case the **client** you are about to create, has the same or similar data as one of the existing clients, it is recommended to use clone option to copy selected data from existing client to a new one.

The following data can be copied:

Profile — although it is unlikely that two different clients will have same profile information (like address or contact details) some information such as payment terms, invoicing policy and locale settings may be common.

Contacts — cloning contacts (**Contacts** tab of **Client** window) data may have time when creating a client for new department or subsidiary of an existing client.

Marketing — marketing information (**Marketing** tab of **Client** window) can also be cloned.

Prices — if a new client has same or similar prices (**Prices** tab of **Client** window) as one of the existing **Clients**, this data can also be cloned.

To clone a client record, select the required client from the list on the **Main** tab of **Client** window and click **Clone** button. Newly cloned client will appear in the list with **CLONED** string added to their name.

See also:

Contacts tab of Client window

Marketing tab of Client window

Prices tab of Client window

12.1.2 Contacts list

Client's Contacts are persons on the client side which you work with regarding this client's projects.

- **Contacts** can be associated with **projects** (by putting one of the client's contacts into Client PM field).
- **Contacts** of the client can also be added to invoices **Attention** fields.

To manage your client contacts, open **Main** tab of **Client** window, select required **Client** and click **Contacts** tab.

See also:

Client window

Creating/Editing Contacts of Client

12.1.3 Marketing

Marketing tab of the **Client** window stores marketing information about selected client. This includes general note, URL (**Marketing link**) and a log of timed marketing records (**Marketing Tracker**).

Marketing Tracker can contain any number of records, each having a **Date**, **Subject** (250 characters maximum) and **Description** (plain text note with no length limitation). **Date** and **Subject** fields of a record cannot be empty. Records in **Marketing Tracker** can be sorted by **Date** or by **Subject**.

See also:

Client window

Basic interface options

12.1.4 Prices to client

Each **client** in TO3000, Version 10 can have a set of prices individual to this particular **client**.

These prices can be assigned on the **Prices** tab of **Client** window.

To view and manage individual price-list for certain client, open **Main** tab of **Client** window, select this client in the list and click **Prices** tab. Only one price per group of services, service and unit combination can exist in individual price-list.

You can *print client's price list* or save it in a text file by selecting the template and clicking **Save**, **Save and Open** or **Print** buttons at the bottom of the window. Templates used to print price-lists can be configured by clicking menu **Settings > Personal** and selecting Templates section. Templates for prices are stored in `\\AIT\Translation Office 3000 V9\Templates\CLIENTS\Prices\` folder.

Prices can be quickly copied from general price-list to individual price-list with the help of **Copy from General** button.

See also:

Client window

General Prices for Clients window

Basic interface options

12.1.5 Quotes to client

Quotes to client can be managed on the **Quotes** tab of **Client** window. A quote can contain a number of draft client jobs, each job representing a service and its price being quoted.

Like most workflow documents in **TO3000, Version 10** quotes can be saved to a printable file or printed. Please refer to Client Quote topic for more details.

Accepted quotes can be used to quickly create a projects based on them. When you create project based on quote, all *draft client jobs* of this quote become *client jobs* in new project, retaining *service*, *volume* and *price* information. Creating project based on quote will not delete this quote.

A quote can have one of the three statuses: *Unknown*, *Accepted* and *Rejected*. Depending on its current status, the quote will be marked with different color in the quotes list:

- blue for Unknown
- green for Accepted
- red for Rejected

Status of the quote can be changed in the **Edit Client Quote** window. Please refer to Client Quote topic for more details.

To manage quotes for certain client, select this client in the list on the **Main** tab of **Client** window and click **Quotes** tab.

See also:

Client Quote

Draft Client Job

12.1.6 Projects of client (With Projects Mode only)

All projects of the currently selected client can be viewed on the **Projects** tab of **Client** window. This window can be used for creating and editing projects, much like on Main Tab of Project window. The difference is that **Projects** tab of **Client** window displays only projects of selected client.

Project Statuses

Projects in the list are marked colors depending on its status:

Black – the project is *completed*.

Green – the project is *not completed* yet, but its *deadline is in the future*.

Blue – the project is *not completed* and *due today*.

Red – the project is *not completed* and *overdue* (its deadline is in the past).

Status colors can be customized with the help of menu **Settings > Personal**. Click **Colors: Statuses** section of **Personal Settings** window.

Filtering Projects List

Use **Status** filter drop-down list to display only **Projects** with a particular status:

See also:

Adding a new Project

Templates

12.1.7 Client jobs of client

Client Jobs belonging to all projects of the currently selected client can be viewed and edited on the **Client Jobs** tab of the **Client** window.

Use **Status** filter drop-down list to display only **Completed**, **Not Completed**, or **Overdue** client jobs.

Use **Invoiced** filter drop-down list you can select to display only those client jobs which have or have not been invoiced.

If you have set invoicing policy for this client in this client's profile on the Main tab of Client window, **TO3000, Version 10** will advise you whether the jobs are ready for invoicing or not.

Client Job statuses

Jobs in the list are marked colors depending on its status:

Green – **Client Job** is *not completed* yet, but its *deadline is in the future*.

Blue – **Client Job** is *not completed* and *due today*.

Red – **Client Job** is *not completed* and *overdue* (its deadline is in the past).

Black – **Client Job** is *completed*.

Also, if a job has any status other than Normal, it will be highlighted either in red or in green:

Job Name	
Engine shceme ER-34221	This Job has On Hold status
Veni Vidi Vici	This Job has Planned status
Nam tempus	

 **Note:** You can change status of any job with the help of **Status** drop-down list in **Edit Job** window.

 **Note:** Status colors can be configured b clicking menu **Settings > Personal** and then clicking Colors: Status.

See also:

Creating Client Jobs

Client window

Basic interface options

12.1.8 Invoices to client

Invoice in TO3000, Version 10 are issued per *client jobs*. One invoice can contain a number of *client jobs* from different *projects*. Job which has been added to approved *Invoice* cannot be edited.

Invoices tab of the **Client** window is used to issue and keep track of invoices to currently selected **Client**. All invoices issued to this Client are displayed in the table. To open the **Invoices** tab, open the Client window and then click **Invoices** tab.

Invoice statuses

Currently issued invoiced can marked in one of the four colors, depending on the status of each of them:

Green – **Invoice** is *outstanding* and is expected *to be paid soon*.

Blue – **Invoice** is *outstanding* and is expected *to be paid today*.

Red – **Invoice** is *outstanding* and its *payment is overdue*.

Black – **Invoice** has been *settled* (paid).

Status colors can be customized with the help of menu **Settings > Personal**. Click **Colors: Statuses** section of **Personal Settings** window.

TO3000, Version 10 automatically assigns statuses to invoices depending on Payment Terms of Client.

Filtering invoices list

You can view only fully paid or only unpaid (outstanding) invoices. To display only *invoices* with a particular status click **Status** filter drop-down list.

You can select to display only those *invoices* which have or have not been approved by you applying **Approved** filter.

See also:

Mass Invoicing

12.1.9 Payments from client

Payments tab of the **Client** window displays payment records of the currently selected client.

Payments can be linked to invoices, fully or partially to settle them. Payments are also added to company profits analysis on balance tabs.

By default payments values are displayed in client's currency. Right-click the table and click **Customize columns** option to configure which payment data must be displayed.

12.1.10 Client balance

Balance tab of the **Client** window provides you with simplified balance of this client's financial accounts:

- Totals of payments, total invoices and account balance;
- Pie chart showing the share of this client in Gross Revenues.

Clients and their Projects	December 2011					January 2012					
	26	27	28	29	30	31	1	2	3	4	5
Cyber Computation Technologies...	Translation software market review										
Definition Designs											

To open the **Account** tab, open the Client window and then click **Account** tab.

See also:

Basic interface options

12.1.11 Files of client

Files tab of the **Client** window provides you with possibility to create the client folder with one click, create, view and search for files and folders related to this client. Folder navigation is described in File manager topic.

Files of client contain invoices and quotes to this client.

See also:

File manager

Project related files

12.1.12 Info of client

Info tab of the **Client** window can be used to enter any optional additional information regarding the selected client in plain text format. Notes can be filtered by custom categories.

Subject — maximum 100 characters long.

Category — categories of notes can be added by clicking menu **Settings > Personal** and selecting **Categories**. See Categories topic for additional details.

Information — plain text note any umber of characters long.

Notes can be filtered by **Subject** or by **Category** columns.

12.1.13 Schedules of client

Schedule tab of the **Client** window displays schedules of this client's *client jobs*. Names of projects are displayed in the column to the left (in *With Projects Mode* only). Job schedules are grouped by projects (in *With Projects Mode* only).

Double-click any schedule representing the client job to open **Edit Client Job** window for this *job*.

See Using Schedules topic for more information on schedules.

Job schedules colors

Like the jobs they represent, job schedule bars can have different colors, depending on the statuses of respective jobs:

Green – Job is *not completed* yet, but its *deadline is in the future*.

Blue – Job is *not completed* and *due today*.

Red – Job is *not completed* and *overdue* (its deadline is in the past).

Grey – Job is *completed*.

See also:

Using Schedules

Client window

12.2 General Prices for Clients window

General Prices for Clients window displays your general price-list. These prices can be used when creating quotes, jobs and invoices for any client in your database.

You can *print your general price list* or save it in a text file by selecting the template and clicking **Save**, **Save and Open** or **Print** buttons at the bottom of the window.

Templates used to print price-lists can be configured by clicking menu **Settings > Personal** and selecting **Templates** section. Templates for prices are stored in **C:**

\Users\Public\Documents\AIT\TO3000, Version 10\Templates\CLIENTS\Prices folder.

See also:

Client window

Prices

Creating/Editing a Price record

12.3 Quotes to Clients window

Quotes to Clients window provides an overview of all quotes, issued to all clients. The options available for this window are the same as those for Quotes tab of Client window. The major differences are:

- **Quotes to Clients** window displays all **quotes** for all **clients**.
- New **quotes** cannot be created using this window.
- Existing **quotes** cannot be deleted using this window.

To create a new **quote to client**, open Main tab of Client window, select that **client**, then switch to Quotes tab of Client window and create your quote from there.

To quickly create a **project** based on a **quote**, select it and click **Create project Based on Quote** button. This will create a project with the same timeline and client jobs as in the quote, this project is based on.

Quote Status

A **quote** can have one of the three statuses *Unknown*, *Accepted* and *Rejected*. Depending on its current status, the quote will be marked with different color in the quotes list:

- **blue** color identifies Unknown quotes
- **green** color identifies Accepted quotes
- **red** color identifies Rejected quotes

See also:

Client window

Quotes to Client

Client Quote

Draft Client Job

Basic interface options

12.4 Invoices to Clients window

Invoices to Clients window offers a general overview of all Invoices issued to all Clients in the database. It can be used to identify currently unpaid invoices, obtain a total of balance due according to all invoices issued, as well as to quickly issue a large amount of invoices.

The options available for this window are the same as those for **Invoices** tab of **Client** window. The major differences are:

- **Invoices to Clients** window displays all invoices for all clients.
- New invoices cannot be created using this window.
- Existing invoices cannot be deleted using this window.

To create a new invoice to client, open **Main** tab of **Client** window, select required client, click **Invoices** tab and create invoice from there. See [Creating invoices to clients](#) topic for details.

To quickly create a large number of Invoices, click **Mass Invoicing** button. See [Mass action](#) topic for details.

Use **Status** filter drop-down list to display only **Invoices** with Outstanding, Settled, and Void status.

Use **Approved** filter drop-down list you can select to display only those **Invoices** which have or have not been approved by you.

Invoice statuses

Currently issued invoiced can marked in one of the four colors, depending on the status of the invoice:

Green – **Invoice** is Outstanding and is expected to be paid soon.

Blue – **Invoice** is Outstanding and is expected to be paid today.

Red – **Invoice** is Outstanding and its payment is overdue.

Black – **Invoice** has been Settled (paid).

TO3000, Version 10 automatically assigns statuses to Invoices depending on Payment Terms, set for each client.

See also:

Client window

Invoices to client

Basic interface options

Mass Invoicing

12.5 Payments from Clients window

Payments from Clients window displays all payments from all clients in one table. This window can be used to obtain total values of money transfers received from Clients, as well as to register multiple payments in one session with the help of Mass action feature.

Use **Status** filter drop-down list to display only **Payments** which are still to be linked with invoices, or only those, which whole amounts have been linked to invoices.

See also:

Client window

Payments tab of Client window

Basic interface options

Mass Payments

12.6 Balance of Clients window

Balance of Clients window presents a simplified balance sheet of your Clients based on their payments and invoices. Accounting staff can use this window to identify which Client's accounts require attention.

Accounts can be viewed both in Client and your Base currency: use **View** drop-down list to select in which currency do you wish to view records. Alternatively you can right-click the table and use **Customize columns** option to add columns to view. The columns containing **(B)** abbreviation display records in your base currency.

 **Note:** To view global balance, please select **Base Currency** option in **View** drop-down list.

See also:

Balance tab of Client window

Basic interface options

12.7 Schedule of Projects (With Projects Mode only)

Schedule of Projects window displays schedules of all **Projects** which fall into the scope of the selected period. The schedules are grouped by clients.

You can select to display **Projects** with particular completion status only using **Status** drop-down menu in the upper right part of the **Schedule of Projects** window.

Double-clicking on the column, representing a **Project** you can open the Edit Project window where you can change the details of the **Project**.

See Using Schedules topic for more information on schedules.

See also:

Client window

Using Schedules

12.8 Schedule of Client Jobs (Without Projects Mode only)

Schedule of Client Jobs window displays schedules of all **Client Jobs** which fall into the scope of the selected period. The schedules are grouped by clients.

You can select to display **Client Jobs** with particular completion status only using **Status** drop-down menu in the upper right part of the **Schedule of Client Jobs** window.

Double-clicking on the column, representing a **Client Jobs** you can open the Edit Client Job window where you can change the details of the **Client Job**.

See Using Schedules topic for more information on schedules.

See also:

Client window

Using Schedules

12.9 Business Expenses

Any *expenses* can be entered into database with the help of **Business Expenses** window. These expenses are used when calculating total balance.

To open the **Business Expenses** window click on the **Business Expenses** icon in the **Clients** section of **Navigation** panel.

Business expense record contains default fields:

Date - the date when the expense was handled

Value - value of the business expense

Description - any additional information about the expense

Custom tab show custom fields for particular record. New custom fields can be created in **Custom Fields** section of **Advanced Settings** in TO3000, Version 10.

12.10 Creating clients

There are two ways of creating a new **Client** record in **TO3000, Version 10**:

A – Using New Client Wizard. To create a Client record, click menu **New... > Client**, and follow the steps of **New Client Wizard**.

B – Creating a new client On the Main tab of Client window. To create a Client record, please follow the steps below:

1. Click **New Client** button above the **Client** list on the **Client** window > **Main** tab.
2. Fill the fields of the **New Client** window:
 - Enter the name of the client in the **Name** text field.
 - Enter the code for the **Client** record in the **Code** text field (12 symbols maximum) or click **AUTO** button to generate the code automatically (it will usually contain the first letters of the **Name** in this case).
 - Select the **Client Currency** using the corresponding drop-down list.
 - Click **OK** to confirm or **Cancel** to discard the entered information.

12.11 Creating client jobs (Without Projects Mode only)

Client jobs can be created, clicking **New** button of **Client Jobs** tab of a *client*.

New Client Job window

Code - unique code of client job is created automatically along with the job itself. The first character "J" indicates that this is a job code, letters afterwards are client code, and the number is the value of client job counter for this client. Each client has independent code counter for this code.

Client Ref. - client reference can be maximum 20 characters long.

Client PO - number of client purchase order, can be maximum 40 characters long.

Client PM - one of the client's contacts, responsible for this job on the client side. Client PM name can be automatically included in invoice containing this job. By default this is the Client PM selected for this project. Client jobs of the same project can have different client PMs. See Contacts List topic for details on adding and editing options for Client PM field.

Name - name of client job will appear in invoices where this job will be included (usually this is the name of document being worked with). This name does not need to include language pair or service name, since this data is being added separately.

Group - group of services. All services in **TO3000, Version 10** are broken down by groups. You can select any of the groups of services available. To add or edit a group of services please open menu **Settings > Business**, and select Groups of Services section.

Service - each group of services contains a separate list of services. Before selecting a service, select group of services first. To add or edit a service please open menu **Settings > Business**, and select Services section.

Volume - job volume can be indicated in a number of units (characters, words, lines, hours and so on). To add custom units please open menu **Settings > Business**, and select Volume Units section.

You can also use built-in **AnyCount** or **CATCount** tools to quickly count the job file, or calculate CAT text volumes (100% match, fuzzy match, and so on). You can also import **Trados** and **Logoport** logs with the help of **CATCount** tool to quickly enter required volume. See **AnyCount** and **CATCount** topics for details.

Price - price can be entered manually or copied from client's individual price-list. To copy price from price-list click **<=Price** button. Price for matching service, group of services and units will be copied. Click **=>** button to copy the price to this client's price list. You can set a fixed price on for client job (which will not be multiplied by job volume) by selecting **flat fee** option in the drop-down list next to the price field. Select **free** option in the same drop-down list to set job total to zero. Price and volume in free job must not necessarily be zero.

Job Folder - when creating client jobs it is often necessary to work with client job files (for example you may need to count a client job file for exact volume). Once the folder has been created, its contents can quickly be accessed on the **Job Folder** tab of **New/Edit Client Job** window.

Timeline - timeline of a client job in **TO3000, Version 10** includes assigned, deadline dates and the date when the client job has been actually completed. Deadline and Completed values are taken

into account when the program determines status of client jobs (like due today, overdue and so on).

Optional Status - these are used when client job needs to be put *on hold*, or when you create *planned* (or potential) jobs. Jobs with *on hold* status have their deadlines undetermined, thus *on hold* jobs cannot become overdue. Jobs with *planned* status cannot be set as completed, since *planned* status assumes that work has not yet started.

Instructions - any instructions or comments of client regarding a client job can be entered here in the form of plain text note.

Work Notes - staff notes can be entered here. It is recommended to enter client notes and staff notes separately.

Custom Fields - client jobs information can be customized by adding custom fields for additional information not foreseen by default controls.

You can save client job data in a printable file or print it with the help of *RTF templates*. To make this option available click **Apply** button first to save new entry in database of client jobs.

Templates for printing project data can be edited with the help of menu **Settings > Personal**. Click **Templates** section to quickly access all template folders. Templates for printing client jobs are saved in *C:\Users\Public\Documents\AIT\TO3000, Version 10\Templates\CLIENTS\Jobs* folder.

See also:

File manager

AnyCount

CATCount

Client Jobs Template Variables

12.12 Creating contacts

The following data can be added to a *Contact* profile:

Photo – up to 110x120 pixels. Click **Photo** button to add a photo to contact's profile. Click **X** button to remove current photo from profile.

Salutation – select one of the salutations, entered with the help of Advanced Settings section of TO3000, *Version 10*. This salutation can then be automatically displayed on all printable documents next to this contact's name.

Name – maximum 80 characters.

Title – maximum 40 characters. Like salutation, title will also be automatically displayed on printable documents.

E-mail (up to 2) – maximum 150 characters. **Send** button becomes active only if valid e-mail address is entered.

Phone (up to 4) and **Fax** numbers – maximum 150 characters each.

Notes – a plain text note, not limited by the number of characters.

12.13 Creating client prices

Client price in [TO3000, Version 10](#) has the following parameters:

Group - you can select any of the groups of services available. To add or edit a group of services please open menu **Settings > Business**, and select Groups of Services section.

Service - each group of services contains a separate list of services. Before selecting a service, select group of services first. To add or edit a service please open menu **Settings > Business**, and select Services section.

Units - prices in [TO3000, Version 10](#) are quoted per certain units. Price can only be applied to a Client Job with its volume in the same units. To add custom units please open menu **Settings > Business**, and select Volume Units section.

Price (per unit) - To add currencies to view open menu **Settings > Business**, and select Currencies section. To configure exchange rate between your base currency and other currencies open menu **Settings > Business**, and select Exchange Rates section.

See also:

General Prices for Clients

12.14 Copying client prices from general prices

Prices from general price list can be copied to individual client's price list. If the same price (with the same [Service](#) and [Group of Services](#) and [units](#)) already exists in this client's price list, [TO3000](#), [Version 10](#) will prompt you to replace the price in individual client's price list with the one being copied from general price list.

General price list can be managed in General Prices for Clients window.

12.15 Creating quotes to clients

All quote information can be added or changed in **Edit Quote** window. To open this window for selected quote double-click this quote in the list.

Client PM - select one of the client's contacts as project manager or contact for this draft project (on the client's side). Please see Contacts topic for details.

Date sent - except for reference this date will also be used by *Global Date filter*. Please see Global Date Filter topic for details.

Code - code of the quote is generated automatically. In this code "Q" character means that this is a quote, letters afterwards represent code of the client and the number is the value of quote counter for this client. Each client has independent code counter for quotes.

 **Note:** Although quote code cannot be edited directly, quote counter can be advanced forward by assigning higher next code value in the client's profile. Please see Next Client Codes topic for details.

Status - settings in this drop-down list determine the color in which the quote will be shown in the list on Quotes tab of Client window or on Quotes to Clients window.

Draft Project - name of the quote. This will also become the name of a project created based on this quote. Draft project name can contain 100 characters maximum.

Client Jobs - lists draft client jobs of this quote. Right-click this table and click Customize columns to configure which data should be displayed. Please see Draft Client Job topic for more details.

Request for Quote, Answer - enter a plain text note here.

Custom fields - this tab can be to fill-in custom fields of quotes. It contains controls of all custom fields added to quotes database. For more information please see Custom Fields.

Quote folder - quote folders are created in Quotes folder located inside each client folder. Quote code is used in naming the quote folder.

Draft Timeline - like regular project, quote has assigned and deadline dates.

Custom Fields - quotes can also contain custom data (for example custom statuses, dates or notes) added in the form of custom fields. If you have any custom fields in quotes to clients, their controls can be found on the **Custom Fields** tab. For more information on adding custom fields please see Custom Fields topic.

Saving and printing Client Quote

To save **Client Quote** as an RTF document, first apply changes made to this quote by clicking **Apply** button. Once the quote has been saved in database, RTF template controls for it will become active.

Use **RTF Templates** drop-down list to select the template which must be used for saving this client quote in an RTF file.

 **Note:** You can choose to save the output file in *PDF* or *DOC* format by selecting this format in **Save As** window with the help of **Save as type** drop-down list.

To edit templates for quotes click menu **Settings > Personal** and select **Templates. Templates** for Client Quotes are located into *C:\Users\Public\Documents\AIT\TO3000, Version 10\Templates\CLIENTS\Quotes* folder

See also:

Quotes Template Variables

12.16 Draft client Job

There are two ways of adding or editing draft client jobs: either in **Edit Quote** window of required quote, or by selecting the quote and managing its Draft Client Jobs in the table to the right.

Draft Client Job contains the following data:

Name - maximum 100 characters long.

Group of services - you can select any of the groups of services available. To add or edit a group of services please open menu **Settings > Business**, and select Groups of Services section.

Service - each group of services contains a separate list of services. Before selecting a service, select group of services first. To add or edit a service please open menu **Settings > Business**, and select Services section.

Volume - when entering volume being quoted, you can either use the volumes specified by client, or count client's file with built-in AnyCount. CAT analysis can also be used to devise draft job volume. To count a file, click **<=AnyCount** button. To enter CAT analysis or load **Trados** or **Logoport** log, click **<=CATCount** button. Please refer to AnyCount, and CATCount topics for details.

 **Note:** Please make sure that correct volume units have been set before using **AnyCount** or **CATCount** options. Jobs in such volume units as hours, for example, cannot be counted with **AnyCount**.

Price - price value can be either entered manually or copied from the individual price-list of client. Click **<=Prices** button to copy price from client's price list. Click **=>** button to add this price to client's price-list.

See also:

AnyCount

CATCount

12.17 Creating invoices to clients

Invoices can be created on the Invoices tab of Client window.

 **Note:** Alternatively invoices can be created by clicking the **Mass Invoices** button on the **Invoices to Clients** window. For more information please refer to Mass Action topic.

New Invoice window

All invoice information can be added or changed in **Edit Invoice** window. To open this window for selected invoice double-click this invoice in the list.

Approved - by approving the invoice, you can prevent changing of Client Job data of the jobs added to this invoice.

Date Sent - this date is considered invoice issue date (no matter when the invoice has actually been created) when applying payment terms. See Payment Terms of Client topic for details.

Code - also called "Client-specific" code, generated automatically. "/" character means that this is an invoice, letters afterwards represent code of the client and the number is the value of invoice counter for this client. Each client has independent counter for this code.

Global Code - global code is generated automatically. Outlay of global invoice code can be configured in the Codes section of **Advanced Settings** window. The non-configurable portion of the code (digits) represent the global invoice counter.

Attention - select one of the Client's contacts for this field. Their name will be displayed in the resulting invoice document. Please see Contacts List topic for details.

Client Jobs - lists client jobs ("items") of this invoice. Right-click this table and click Customize columns to configure which data should be displayed.

Mark as Paid button - allows to create a **payment** according to a total of the **invoice**.

Adjustments - adjustments are added to invoice totals. Discounts and taxes are not applied to adjustments.

Payment Method - you can add payment details (banking, credit card number, PayPal account and so on) to your invoice in the form of payment methods. To configure payment methods click menu **Settings > Business** and select **Payment Methods** section. See Payment Methods topic for details on how to add or edit options on this tab.

Linked with Payments - unless the full amount of invoice is linked with payments, the status of this invoice will remain outstanding. On this tab you can check if the invoice has been linked with payments. Payments can be linked to invoices from **Edit Payment** window only.

Also on Linked with Payments tab Phantom Payments can be created. These are used to balance negligent parts of invoices which keep **Invoices** with **Outstanding** status, and make them **Settled**.

➔ **Example:** Invoice Total = 1000EUR, it is linked with Payment on 997EUR. When you click **Add Phantom Payment** you will be suggested to create a phantom payment on 3EUR. If the invoice is not linked to any payment – you will be suggested to create a phantom payment on with total equal to the invoice total sum.

Notes - any additional notes which your invoice must include, can be added on this tab.

Discount/Markup - invoices can have up to 2 discounts and markups. These are applied as positive (markup) or negative (discount) percentage to invoice subtotal. To configure discounts and markups click menu **Settings > Business** and select **Discounts/Markups** section. For more information on adding or editing discounts and markups please see Discounts/Markups topic.

Tax - each invoice can have up to 2 taxes. Taxes are applied as percentage to invoice subtotals plus discounts/markups. To configure taxes click menu **Settings > Business** and select **Taxes** section. For more information on adding or editing discounts and markups please see Taxes topic.

Saving and printing Invoices

To save invoice as an RTF document, first apply changes made to this invoice by clicking **Apply** button. Once the invoice has been saved in database, RTF template controls for it will become active.

Use **RTF Templates** drop-down list to select the template which must be used for saving this invoice in an RTF file.

 **Note:** You can choose to save the output file in *PDF* or *DOC* format by selecting this format in **Save As** window with the help of **Save as type** drop-down list.

To edit templates for invoices click menu **Settings > Personal** and select **Templates**. **Templates** for invoices are located into *C:\Users\Public\Documents\AIT\TO3000, Version 10\Templates\CLIENTS\Invoices* folder

See also:

Invoice Template Variables

12.18 Creating payments

Payment from client contains the following data:

Date Received - except for accountant's reference this date will also be used by *Global Date filter*. Please see Global Date Filter topic for details.

Code - payment code is generated automatically. In this code "P" character means that this is a payment, letters afterwards represent code of the client and the number is the value of payments counter for this client. Each client has independent code counter for payments.

Volume - total amount of payment in Client's currency. TO3000, Version 10 will calculate your revenues in your base currency according to exchange rates. See Exchange Rates topic for details.

Notes - any additional notes by accounting or other staff. For example if this is an advance payment for future project.

Linked with Invoices - payment value can be linked with invoices - fully or partially. The table on **Linked with Invoices** tab indicates how much is linked to which invoice.

Phantom invoices are virtual invoices which can be used to make the payment linked, without settling any of the actual invoices. Phantom invoices can be used for ensuring account consistency in case the payment for some reason should not be used to cover invoices.

Saving and printing Payments to Client

To save **Payment** as an RTF document, first apply changes made to this payment by clicking **Apply** button. Once the payment has been saved in database, RTF template controls for it will become active.

Use **RTF Templates** drop-down list to select the template which must be used for saving this payment in an RTF file.

 **Note:** You can choose to save the output file in *PDF* or *DOC* format by selecting this format in **Save As** window with the help of **Save as type** drop-down list.

To edit templates for payments click menu **Settings > Personal** and select **Templates**. **Templates** for payments to clients are located at *C:\Users\Public\Documents\AIT\TO3000, Version 10\Templates\CLIENTS\Payments* folder.

12.19 Void Invoices

By *voiding* invoice, you do not delete it from your invoices list. However once voided, invoice cannot be printed or edited, and the jobs added to this invoice revert to Uninvoiced status.

When voiding invoice you can enter reason for voiding, and specify date (will be used by Global Date Filter).

Details of void invoice are kept in database in a form of plain text note for future reference. The following data will be preserved in void invoice:

- *Client Jobs*: Code, Client Ref., PO Number, Name, Assigned, Deadline, Completed, Price, Volume, Exchange Rate: Total

- *Discounts*

- *Taxes*

Invoice cannot be voided if it has linked payments.

Void invoices are displayed in all invoice lists.

13 Projects (With Projects Mode only)

13.1 Project window

Project Window can be used to view, edit and enter new information about your projects, as well as to create and manage *Client jobs* and *Project files*.

To open **Project** window click **Project** icon from the **Projects** tab of the **Navigation** panel.

Project Window tabs

Different **tabs** of Project window represent different aspects and elements of your projects stored in **TO3000, Version 10** database. Project data is broken into the following Project window tabs:

- Main tab – provides the most basic overview of your Projects. Projects are created and marked as completed here. This tab also contains Project Profiles.
- Tree tab – provides schematic view of Project jobs structure. Here Client jobs can be created.
- Client Jobs tab – gives an overview of Client Jobs of a Project. Client Jobs can be created here as well.
- Files tab – provides quick access for project folder of selected Project, as well as to other files related to this Project.
- Info tab – this tab is used for creating various project-related notes.
- Schedule tab – a schematic overview of Project jobs, presented in a form of schedules.

13.1.1 Project Profile

Main tab of **Project** contains *list of projects* and *project profiles*. Use this tab to create new *Projects*, change project parameters and close *Projects* as they get completed.

To open **Main** tab of **Project** window, click **Project** icon on the navigation **Panel**, and then select **Main** tab.

Project list options

To *search* project by its name, type string being searched into the field over the project list.

To *sort project list* by certain column click this *column's header*. Clicking **Code** column will sort projects by their codes (or chronologically), clicking **Project name** column will sort projects by their names (or alphabetically).

Information displayed in projects list can be configured. Right-click project list and click **Customize columns** to add or remove columns (Deadline, PM and so on).

Projects in the list can be filtered by project status (completed, planned and so on).

Status colors and flags

Records in project list are marked by color:

- Black – the project is *completed*.
- Green – the project is *not completed, deadline in the future*.
- Blue – the project is *not completed and due today*.
- Red – the project is *not completed and overdue*.

Highlighted in green color are planned projects. Highlighted in red color are projects put on hold.

0020	Personal Letters
0039	Project 1
0041	Project 2
0023	Spatial index

This project has Planned status

This Project has On Hold status

 **Note:** You can change colors to mark off items status on the Colors: Status tab of the Personal Settings.

To flag a project, right-click the narrow field to open a drop down menu.

Editing project data

Project Code is automatically assigned to each Project in [TO3000, Version 10](#). All Project Codes are unique and cannot be edited.

Name - project name can be 150 characters long.

Client PM - one of the client's contacts, responsible for this project on the client side. The person selected here will be set as default client's PM for all new client jobs of this project. See [Contacts List](#) topic for details on adding and editing contacts.

Timeline - timeline of a project in [TO3000, Version 10](#) includes assigned, deadline dates and the date when the project has been actually completed.

Optional Status - these are used when project needs to be put *on hold*, or when you create a *planned* (or potential) projects. Projects with *on hold* status have their deadlines undetermined, thus *on hold* projects cannot become overdue. *On hold* projects are highlighted in red. Projects with *planned* status cannot be set as completed, since *planned* status assumes that work has not yet started. *Planned* projects are highlighted in green.

General Information - project profile can contain any general information, relevant to this project in a form of plain text note.

Custom Project Data

Project database can be customized by adding custom fields. Any custom fields that have been added to projects database, can be accessed by clicking **Custom** tab, next to the **Project Profile** tab.

To add custom fields to projects, click menu **Settings > Advanced**, and click **Custom Fields** section.

See also:

[Creating Client Jobs](#)

13.1.2 Client Jobs of Project

Client Jobs tab lists all client jobs within the currently selected project.

Filtering Client Jobs

Use **Status** filter drop-down list to display only Completed, Not Completed, or Overdue **Client Jobs**.

Use **Invoiced** filter drop-down list you can select to display only those **Client Jobs** which have or have not been invoiced.

If you have set invoicing policy for this Client in this Client's profile on the Main tab of Client window , **TO3000, Version 10** will advise you whether the jobs are ready for invoicing or not.

Client Job Statuses

Jobs in the list are marked colors depending on its status:

Green – client job is *not completed* yet, but its *deadline is in the future*.

Blue – client job is *not completed* and *due today*.

Red – client job is *not completed* and *overdue* (its deadline is in the past).

Black – client job is *completed*.

Also, if a Job has any status other than Normal, it will be highlighted either in red or in green:

Job Name	
Engine shceme ER-34221	This Job has On Hold status
Veni Vidi Vici	This Job has Planned status
Nam tempus	

 **Note:** You can change status of any job with the help of **Optional Status** drop-down list in **Edit Job** window.

 **Note:** Status colors can be configured b clicking menu **Settings > Personal** and then clicking Colors: Status.

See also:

Creating Client Jobs

13.1.3 Files of project

Files tab of the **Project** window provides you with possibility to create the client folder with one click, create, view and search for files and folders related to this Project. Folder navigation is described in File manager topic. To open **Files** tab, click **Files** tab.

See also:

File manager

Folder Structure

13.1.4 Info tab of Project window

Info tab of the **Project** window can be used to enter any optional additional information regarding the selected the project in plain text format. Notes can be filtered by custom categories.

Subject - maximum 100 characters long.

Category - categories of notes can be added by clicking menu **Settings > Current user** and selecting **Categories**. See Categories topic for additional details.

Information - plain text note any umber of characters long.

Notes can be filtered by **Subject** or by **Category** columns.

13.1.5 Schedules of Project

Schedule tab of the **Client** window displays schedules of *client jobs* belonging to the currently selected *project*.

Double-click any schedule representing the client job to open this job for editing.

See Using Schedules topic for more information on schedules.

Job schedules colors

Just like the jobs they represent, job schedule bars can have different colors, depending on the statuses of respective jobs:

Green – **Job** is *not completed* yet, but its *deadline is in the future*.

Blue – **Job** is *not completed* and *due today*.

Red – **Job** is *not completed* and *overdue* (its deadline is in the past).

Grey – **Job** is *completed*.

See also:

Using Schedules

Client window

13.2 Client Jobs window

All **Client Jobs** stored in the database are listed in the **Clients Jobs** window. The options available for this window are the same as those for **Client Jobs** tab of **Project** window. The major differences are:

- **Client Jobs** window displays all client jobs of all projects.
- New client jobs cannot be created using this window.
- Existing client jobs cannot be deleted using this window.

To open **Client Jobs** window click **Client Jobs** icon in the **Projects** section of **Navigation Panel**.

Filtering Client Jobs

Use **Status** filter drop-down list to display only Completed, Not Completed, or Overdue **Client Jobs**.

Use **Invoiced** filter drop-down list you can select to display only those **Client Jobs** which have or have not been invoiced.

If you have set invoicing policy for this Client in this Client's profile on the Main tab of Client window , **TO3000, Version 10** will advise you whether the jobs are ready for invoicing or not.

Client Job statuses

Jobs in the list are marked colors depending on its status:

Green – client job is *not completed* yet, but its *deadline is in the future*.

Blue – client job is *not completed* and *due today*.

Red – client job is *not completed* and *overdue* (its deadline is in the past).

Black – client job is *completed*.

Also, if a Job has any status other than Normal, it will be highlighted either in red or in green:

Job Name	
Engine shceme ER-34221	This Job has On Hold status
Veni Vidi Vici	This Job has Planned status
Nam tempus	

 **Note:** You can change status of any job with the help of Optional Status drop-down list in Edit Job window.

 **Note:** Status colors can be configured b clicking menu **Settings > Personal** and then clicking Colors: Status.

See also:

Creating Client Jobs

13.3 Schedule of Client Jobs window

This window displays *project schedules* (upper field) and schedules of their *client jobs* (lower field).

Double-click any schedule representing project or client job to open this project or job for editing.

See Using Schedules topic for more information on schedules.

Job and project schedules colors

Just like the jobs they represent, job schedule bars can have different colors, depending on the statuses of respective jobs:

Green – project or job is *not completed* yet, but its *deadline is in the future*.

Blue – project or job is *not completed* and *due today*.

Red – project or job is *not completed* and *overdue* (its deadline is in the past).

Grey – project or job is *completed*.

See also:

Using Schedules

Client window

13.4 Creating a project

Projects are created from two areas of [TO3000, Version 10](#):

A: On the **Main** tab of **Project** window by clicking **New Project** button.

B: On the **Projects** tab of **Client** window by clicking **New** button.

New Project window

Client PM - one of the client's contacts, responsible for this project on the client side. The person selected here will be set as default client's PM for all new client jobs of this project. See [Contacts List](#) topic for details on adding and editing contacts.

Name - project name can be 150 characters long.

Timeline - timeline of a project in [TO3000, Version 10](#) includes assigned, deadline dates and the date when the project has been actually completed.

To mark project as completed, click **Timeline** button and select **Completed** check box.

Optional Status - these are used when project needs to be put *on hold*, or when you create *planned* (or potential) projects. Projects with *on hold* status have their deadlines undetermined, thus *on hold* projects cannot become overdue. *On hold* projects are highlighted in red. Projects with *planned* status cannot be set as completed, since *planned* status assumes that work has not yet started. *Planned* projects are highlighted in green.

 **Note:** All project data except project code and client can be edited at any time later. See [Project Profile](#) topic for details.

 **Note:** Jobs data, like volumes, pricing and so on is added to an existing project in the form of client jobs. See [Creating Client Jobs](#) topic for details.

You can save project data in a printable file or print it with the help of [RTF templates](#). To make this option available click **Apply** button first to save new entry in database of projects.

Templates for printing project data can be edited with the help of menu **Settings > Personal**. Click **Templates** section to quickly access all template folders. Templates for printing projects are saved in `IC:\Users\Public\Documents\AIT\TO3000, Version 10\Templates\PROJECTS\` folder.

See also:

[Project Template Variables](#)

[Project Profile](#)

[Creating Client](#)

13.5 Creating client jobs

Client jobs can be created in the following areas of [TO3000, Version 10](#):

A: Tree tab of **Project** window.

- by right-clicking the tree view and selecting **New Client Job**

- by clicking **New Client Job** button at the top of the tree view.

B: Client Jobs tab of **Project** window by clicking **New** button.

New Client Job window

Code - unique code of client job is created automatically along with the job itself. The first character "J" indicates that this is a job code, letters afterwards are client code, and the number is the value of client job counter for this client. Each client has independent code counter for this code.

Client Ref. - client reference can be maximum 20 characters long.

Client PO - number of client purchase order, can be maximum 40 characters long.

Client PM - one of the client's contacts, responsible for this job on the client side. Client PM name can be automatically included in invoice containing this job. By default this is the Client PM selected for this project. Client jobs of the same project can have different client PMs. See [Contacts List](#) topic for details on adding and editing options for Client PM field.

Name - name of client job will appear in invoices where this job will be included (usually this is the name of document being worked with). This name does not need to include language pair or service name, since this data is being added separately.

Group - group of services. All services in [TO3000, Version 10](#) are broken down by groups. You can select any of the groups of services available. To add or edit a group of services please open menu **Settings > Business**, and select **Groups of Services** section.

Service - each group of services contains a separate list of services. Before selecting a service, select group of services first. To add or edit a service please open menu **Settings > Business**, and select **Services** section.

Volume - job volume can be indicated in a number of units (characters, words, lines, hours and so on). To add custom units please open menu **Settings > Business**, and select **Volume Units** section.

You can also use built-in [AnyCount](#) or [CATCount](#) tools to quickly count the job file, or calculate CAT text volumes (100% match, fuzzy match, and so on). You can also import [Trados](#) and [Logoport](#) logs with the help of [CATCount](#) tool to quickly enter required volume. See [AnyCount](#) and [CATCount](#) topics for details.

Price - price can be entered manually or copied from client's individual price-list. To copy price from price-list click **<=Price** button. Price for matching service, group of services and units will be copied. Click **=>** button to copy the price to this client's price list. You can set a fixed price on for client job (which will not be multiplied by job volume) by selecting **flat fee** option in the drop-down

list next to the price field. Select **free** option in the same drop-down list to set job total to zero. Price and volume in free job must not necessarily be zero.

Project Folder - when creating client jobs it is often necessary to work with project files (for example you may need to count project file for exact volume). Once the folder has been created, its contents can quickly be accessed on the **Project Folder** tab of **New/Edit Client Job** window.

Timeline - timeline of a client job in **TO3000, Version 10** includes assigned, deadline dates and the date when the client job has been actually completed. Deadline and Completed values are taken into account when the program determines status of client jobs (like due today, overdue and so on).

Optional Status - these are used when client job needs to be put *on hold*, or when you create *planned* (or potential) jobs. Jobs with *on hold* status have their deadlines undetermined, thus *on hold* jobs cannot become overdue. Jobs with *planned* status cannot be set as completed, since *planned* status assumes that work has not yet started.

Instructions - any instructions or comments of client regarding a client job can be entered here in the form of plain text note.

Work Notes - staff notes can be entered here. It is recommended to enter client notes and staff notes separately.

Custom Fields - client jobs information can be customized by adding custom fields for additional information not foreseen by default controls.

You can save client job data in a printable file or print it with the help of *RTF templates*. To make this option available click **Apply** button first to save new entry in database of client jobs.

Templates for printing project data can be edited with the help of menu **Settings > Personal**. Click **Templates** section to quickly access all template folders. Templates for printing client jobs are saved in *C:\Users\Public\Documents\AIT\TO3000, Version 10\Templates\CLIENTS\Jobs* folder.

See also:

File manager

AnyCount

CATCount

Client Jobs Template Variables

14 Schedules

Introduction

Schedules for *clients* and *projects* in TO3000, Version 10 can be used to obtain a visualized representation of work processes. Schedules provide a comprehensive view of project and job intensity at any given moment.

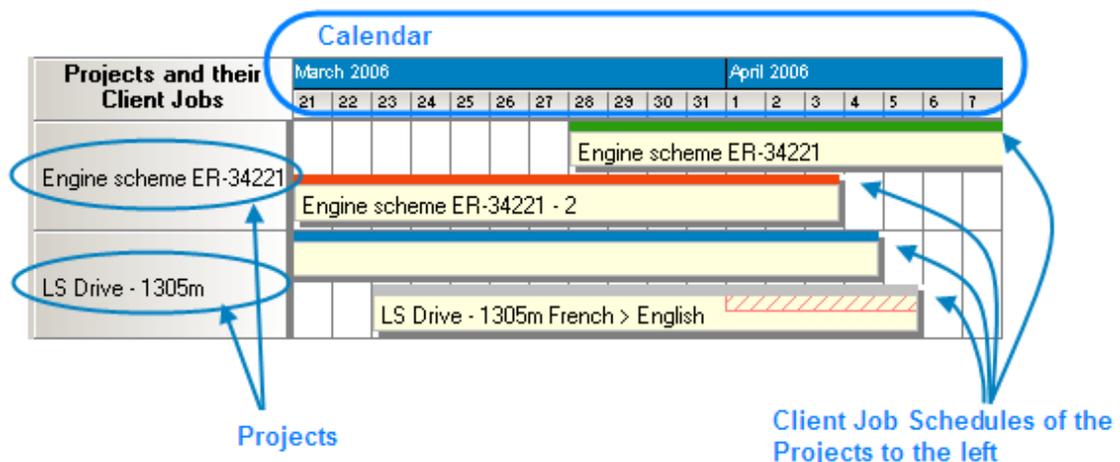
Two kinds of the **Schedules** are provided for each of the listed parts of TO3000, Version 10:

Clients	<ol style="list-style-type: none"> 1. Schedule of projects (and corresponding client jobs) for the selected client. — Schedule tab of Client window 2. For <i>With Projects Mode</i>: Schedule of all projects. — Schedule of Projects window 3. For <i>Without Projects Mode</i>: Schedule of all client jobs. — Schedule of Client Jobs window
Projects (With Projects Mode only)	<ol style="list-style-type: none"> 1. Schedule of client jobs for the selected project. — Schedule tab of Project Window 2. Schedule of all projects and client jobs. — Schedule of Client Jobs window

General issues on schedules

On the left panel of any **Schedule** tab the names of the jobs or projects (depending on the particular **Schedule**) are displayed. The schedules are represented in the form of horizontal bars, spanning through a grid in which each column represents a certain time unit (hour, 8 hours, 12 hours or day).

➔ **Example:**



The color of the schedule bar represents the status of the process it displays:

	Red frame marks that deadline for the process was in the past.
	Blue frame marks that deadline for the process is later today.
	Green frame marks that deadline for the process is in the future.
	The process is not/was not finished in time. The red fragment indicates overdue time
	Red dots in the end/in the beginning of the process bar indicates that some process fragment is beyond the currently selected schedule period.

 **Note:** Status colors can be changed on the Personal Settings > Colors: Status tab.

 **Note:** Double-click on the column representing the *job* to open **Edit Job** window for this *job*.

Schedules are displayed for certain period. To specify the period you want to be displayed, use **Selected Period** drop-down lists (select two dates: from-to). To apply the selected time period click **Apply** button.

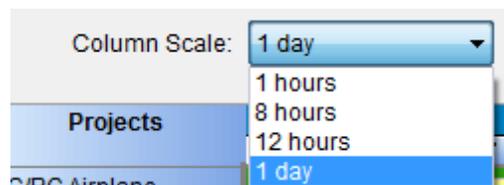
Thus only schedules which fall between the two assigned dates will be displayed.

The column scale of the calendar can be 1 day, 12 hours, 8 hours or 1 hour.

➔ **Example:**

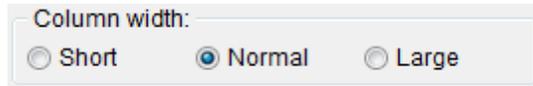
Each column represents one day	
Each column represents one hour	

Use **Column Scale** drop-down list to specify the necessary value:



The set of available values for calendar graduation varies depending on the length of the *selected period*.

The width of the columns representing *jobs* can range from small to large. Use **Column width** options to specify the necessary value:



See also:

Schedule tab of Client window

Schedule of Projects window

Schedule tab of Project Window

Schedule of Client Jobs window

15 File management

15.1 Folder structure

Business Folder

TO3000, Version 10 automatically creates and maintains folder structure at any accessible location.

All workflow files (such as *client-sent files* and *files to be sent to clients*, as well as printable *invoices* and *quotes*) are stored in respective subfolders of *Business folder*.

Business folder by default it is created in the root of drive *C*. Location of Business folder on the Folders section of Advanced settings window. To specify a different business folder location:

1. Click menu **Settings > Advanced**;
2. Click **Folders** section;
3. Click **Change** button.

Having changed *Business folder* location you must move the content from the old *Business folder* manually.

Different folder types

Business folder contains two sub-folders: *Clients* folder and *Projects* folder.

Clients folders (a separate folder for each client) are stored in the *Clients* folder. Each folder is named by unique **Client Code**. Please refer to Client folder topic for details.

Project folders (a separate folder is created for each project, *With Projects Mode* only) are stored in the *Project* folder. Each folder name contains unique *project code* project name. Please refer to Project folder topic for details.

Client job folders (a separate folder is created for each client job, *Without Projects Mode* only) are stored in the *Client* folder. Each folder name contains unique *client job code*.

These folders, as well as their subfolders are created automatically by clicking **Create** button in respective areas of the program (like **Main** tab of **Project** window).

Automatic folder creation

With the help of automatic folder creation feature for any folder in TO3000, Version 10 you can define a number of subfolders to be automatically created upon creation of their parent folder.

To enable this feature for certain folder type, select **Automatic Folder Creation** checkbox on the tab of required folder in **Folders** section of **Advanced settings** window.

Every time *Client* or *Project* folder is created by TO3000, Version 10 Workstation, any folders or subfolders added to respective tab of **Folders** settings will be created in that folder automatically

To disable creation of customized folders clear **Automatic Folder Creation** on the corresponding tab Folders tab.

See also:

File manager

15.2 Client Folder

Client folder is a storage location for all files relevant to a particular client. This folder is created with the help of [Main](#) and [Files](#) tabs of the [Client](#) window.

The following subfolders are created automatically in [Client](#) folder, depending on the document being saved:

- [Prices](#) – in this folder all printable price-lists for current client are saved.
- [Quotes](#) – in this folder all printable quotes for current client are saved.
- [Invoices](#) – in this folder all printable invoices for current client are saved.
- [Payments](#) – in this folder all payment printouts of the current client are saved. In [Without Projects Mode](#)
- [Jobs](#) - in this folder all printable documents related to jobs are saved. In [Without Projects Mode](#) Jobs folder contains all client jobs' files. See more information at [Client Jobs Folder](#).

Each client folder can contain custom subfolders which will be created automatically together with a client folder. These subfolders can be specified on the [Folders section](#) of [Advanced settings](#) window.

15.3 Project Folder (With Projects Mode only)

Primary purpose of every *Project* folder is to serve as a storage location for all files relevant to a particular **Project**. It can be created from the **Main** and **Files** tab of **Project** window. It is created automatically when any project-related document is saved.

Project's folder always contains at least three subfolders:

- **Incoming** (where you can store the files sent you by the *client*)
- **Work** (where you can store files while working on them)
- **Outgoing** (where you can put files ready to be sent to the *client*)

Each project's folder can contain custom subfolders which will be created automatically. These subfolders can be specified on the **Folders** section of **Advanced settings** window.

All *client jobs* are stored in project folders, not in clients' folders. However, having opened **Files** tab of **Client** window, you can quickly browse through project folders of this client, using **Related Folders** options. Analogically, client folder of the respective client can quickly be opened from the **Files** tab of **Project** window.

For consistency purposes name of the project's folder is the same as *project code* (the default value) and cannot be modified manually. Name of the project folder can include not only unique project code.

Project folder name

The way *Project* folders are named can be customized with on **Folders** section of Advanced settings window. Name of each *Project* folder can consist of the following components:

Project code (obligatory)

Project name

Click **Update Folders** button to apply changes to the names of all *Project* folders, created before. This feature is available only for name of projects' folders and does not have effect on other folder names.

15.4 Client Job Folder (Without Projects Mode only)

Primary purpose of every *Client Job* folder is to serve as a storage location for all files relevant to a particular **Client Jobs**. It can be created from the **Client Jobs** tab of **Client** window. It is created automatically when any client job-related document is saved. *Client Job* folders are saved under *Client/Jobs* folder.

Client Job folder always contains at least three subfolders:

- **Incoming** (where you can store the files sent you by the *client*)
- **Work** (where you can store files while working on them)
- **Outgoing** (where you can put files ready to be sent to the *client*)

Each *Client Job* folder can contain custom subfolders which will be created automatically. These subfolders can be specified on the **Folders section** of **Advanced settings** window.

All *client jobs* are stored in clients' folders.

For consistency purposes name of the *Client Job* folder is the same as *Client Job Code* (the default value) and cannot be modified manually.

15.5 File manager

General Client and Project windows

General folder windows contain all available folders of certain type:



Client Folders – contains *folders of all clients* in database.



Project Folders – *folders of all projects* can be opened from this window.

Both general folder windows can be opened using [TO3000, Version 10](#) navigation bar. Click any of these icons to open appropriate folder window.

Folders are opened with built-in file manager. Interface of [TO3000, Version 10](#) file manager is very much like interface of [Windows Explorer](#) with some additional options.

The structure of specified folder group (*Project* folders in this particular case) is displayed in the form of folder structure tree to the left. Click any of these folders to view its contents in the field to the right.

Folders of certain Clients and Projects

Files of any particular *client* or *project* can be viewed with the help of **Files** tab, available in each **Client** or **Project** window in [TO3000, Version 10](#). File manager interface in this case has more options, like [related folders](#) and [FTP access](#).

Create button: if the opened project does not have its folder created yet, click this button to automatically create folder of current project.

Explore button: click this button to open currently viewed folder in [Windows Explorer](#) window. Once opened, this window can be accessed with the help of **Open Folders** drop-down list.

Search button: opens common [Windows search](#) tool pre-set to search in currently viewed folder.

Folder address displays path to currently open folder. It can be quickly copied to clipboard by double-clicking this string and using context menu to select **Copy** option.

Common file options buttons can be used to perform standard operations with selected files and folders.

Folder structure tree and **contents of currently selected folder** are identical to those of general folders windows.

Related Folders

Related folders contain information relevant to currently open folder. For example, working with *project files* you might also need access to Client folder, and vice-versa.

To quickly open related folders to currently opened folder, use **Related folders** field.

Client related folders are: *Project* folders of this client's projects, and *client FTP connections*.

Project related folders are: *Client* folder of selected project, and *client FTP connections*.

Related Folders list can also be used to open any folder on local PC, as well as to connect and work with FTP folder.

- Select **Local Folders** option to open folders on local PC.
- Select **Client FTP** to connect and work with FTP folders.

Any option selected in **Related Folders** list is opened in separate field of **Files** tab.

 **Note:** If you change the *client code* (it can be done from the **Main** tab of the **Client** window), **TO3000, Version 10** will attempt to rename the appropriate folder.

Folder creation options in different TO3000, Version 10 windows

Edit windows for quotes, projects, jobs etc. have option for quick folder creation — **Create** and **Explore** buttons.

Also **Edit Job** windows have **Project Folder** tab for quick access to job work files.

Project Folder tabs have a number of own *related folders*. Use **Related Folders** drop-down list to quickly open any of them in the field to the right. The following folders can be quickly accessed from **Edit Job** window:

- **FTP client**
- **Client folder** of respective client.

Switching between open folders

Using **Open Folders** drop-down list from the button panel of **TO3000, Version 10 Workstation** interface you can easily switch between the folders opened during the current **TO3000, Version 10** working session. Any folder you open using **TO3000, Version 10** (using **Explore** buttons) is automatically added to the list. When you need to switch, just select the necessary folder in the drop-down list and click **Go** button.

See also:

TO3000, Version 10 interface

Folder structure

15.6 Built-in FTP client

TO3000, Version 10 features built-in *FTP client*, which can be used to quickly access *FTP folders* of clients to upload or download workflow files.

To access FTP client:

1. Open **Files** tab of any client or project.
2. In **Related Folders** field select **Client FTP** option.

FTP access interface

- **FTP** indicator indicates connection status. Red indicator is displayed if FTP server status is disconnected. When the server is connected, indicator will change to green.
- Click **Connect/Disconnect** button to connect/disconnect to currently selected FTP server in nearby drop-down list.
- Click **Manage Connection** button  to create new FTP connection, edit or delete currently selected FTP connection.

Creating new FTP Connection

In order to connect to FTP folder you will need to create an **FTP Connection** for this folder, which implies entering FTP server address, and login information, which later will be used by TO3000, Version 10 to log in to this FTP folder.

To create a new connection:

1. Click **Manage Connections** button 
2. Select **New connection ...** in the menu which appears:
3. Enter the **name** of new connection, **FTP server address**, **user name** (FTP login) and **password** (TO3000, Version 10 will memorize your password)
4. Select additional settings if you need to use them (**Use passive transfer**, **FTP over SSL/TLS**, **Keep connection alive**).
5. Click **OK** button to create this FTP connection.

Connecting to FTP

Once FTP connection has been created, it can quickly be activated with the help of **FTP connections** drop-down list.

1. Select the required **FTP Connection** in the drop-down list to connect to that FTP server.
2. Click **Connect** button to display the contents of FTP in the field below.

16 Multiple currencies support

In *TO3000, Version 10* you can assign individual *client currency* to each *client*, and still, be able to see balance data in your *base currency*. This chapter will help you to understand how currencies are handled in *TO3000, Version 10*.

Base currency is the currency in which you make all internal accounting records, i.e. balance, taxes, business expenses etc. In most cases, it is the currency of your country.

Client currency is the currency in which you produce invoices for your client and receive payments from your client.

In *TO3000, Version 10* you can easily produce *invoices* and link them with *payments* from clients and record them in client currencies, and automatically make parallel records in your base currency.

These parallel records in your *base currency* allow conducting all your internal company accounting in your *base currency*, still keeping the records in other currencies.

To make these parallel records possible, you only have to enter currency rates for the currencies of your clients. You can also easily change the currency rates for each recorded client job (separately) or for all future jobs.

See also:

Base Currency

Currencies and Exchange Rates

Client Currencies

16.1 Base currency

Base currency represents your local currency, in which you prefer to record accounting information.

Base currency can be changed in Advanced settings window. To change your base currency:

- Click menu **Settings > Advanced**.
- Click **General** section.
- Click **Base Currency** button and select the necessary currency in the **Edit Base Currency** window.
- Please make sure that the base currency is set to correct currency before starting your work in [TO3000, Version 10](#).

See also:

Advanced settings

16.2 Currencies and exchange rates

Adding new currencies

Since the currencies of your clients may be different from yours, you will need to add new currencies to your *TO3000, Version 10* database and to define their exchange rates relating to your base currency.

To define currency settings:

1. Click menu **Settings > Business**;
2. Click **Currencies**;
3. If some of the currencies you need are not included into the list, you may add them by clicking **New** button. You can also edit or delete existing currencies.

Setting exchange rates

You can enter exchange rate between your *base currency* and any of *client currencies*. Exchange rates of currencies are used for keeping parallel records in both base currency and client currencies relating to your base currency.

To enter exchange rate:

1. Click menu **Settings > Business**.
2. Click **Exchange Rates**;
3. To add new currency exchange rate, click **New** button.
4. Select the currency from the drop-down list, enter its rate relating to your *base currency* and click **OK**

See also:

Currencies

16.3 Client currencies

When you add new *client* to your database, you define the *currency* of this *client*. All the prices, quotes, invoices and payments related to the *client* will be recorded in the currency you defined.

 **Note:** If you encounter a rare case when your transactions with particular *client* involve more than one currency, you can create two separate *client* records, separate for each currency. This way this *client* will have two separate accounts in your database, one for each *currency*.

Client currency of each client can be changed on **Main** tab of **Clients** window by clicking **Client Currency** button in client profile.

See also:

Client Profile

17 Templates

Templates in TO3000, Version 10

Template is an *RTF* ("Rich Text Format") file stored in your TO3000, Version 10 setup folder and used as a template when saving work flow documents in *RTF* (rich text format) or *PDF* (portable document format) files. RTF files can be opened with most text editors, including *MS Word*, and easily converted to more common .doc format.

Saving a document for printing

The following documents can be saved as printable RTF, PDF and DOC files using their own templates:

- Invoices to clients
- Payments from clients summaries
- Project, and client job summaries
- Quotes to clients

Documents can be saved using windows **Edit Invoice**, **Edit Project** and so on, as well as **Prices** tabs of **Client** window, and **General Prices for Clients** window.

Any window which has RTF Templates section can be used to save its data in a printable document. Until the data which you are editing is saved in your database, RTF Templates section will display message that the templates will become available once the new document record has been saved in database.

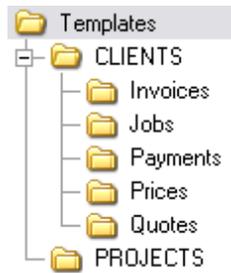
To save a document, first apply changes made to this document by clicking **Apply** button. Once the document has been saved in database, RTF template controls for it will become active, and display a drop-down list, which can be used to select different templates.

- Use **RTF Templates** drop-down list to select the Template which must be used for saving the current document in an RTF file.
- Click **Save** button to save template in the respective folder.
- Click **Save&Open** button to open this document in your default text editor immediately after saving it.
- Click **Print** button to quickly send this document to printer.

 **Note:** You can choose to save the output file in *RTF*, *PDF* or *DOC* format by selecting this format in **Save As** window with the help of **Save as type** drop-down list.

Template files

Each document type (like *invoices*, *purchase orders*, *quotes*, and so on) uses templates stored in specific folder, named by the document type, which templates it stores:



By editing template overlay and format, you edit overlay and format of all the documents which will be saved with it. There can be a number of templates to choose from for one document type. Each RTF file in the template folders is considered a template.

Editing templates

[Templates](#) can be opened for editing using the [Templates](#) section of [TO3000, Version 10 Personal settings](#). To edit templates:

1. Click menu [Settings > Personal](#).
2. Click [Templates](#) section of [Personal settings](#) window.
3. Locate the folder of the document, which templates you wish to edit.
4. Open required template file with text editor ([MS Word](#) or any other editor supporting RTF format).
5. After making all the necessary changes, save [Template](#) in the same or new RTF file of the same folder.

 **Note:** Template folders can also be opened with regular file browser, like [Windows Explorer](#).

Template Variables

Variable is a certain symbol combination which is entered in template files. When a document is saved using template, [TO3000, Version 10](#) recognizes the variable and inserts required data in the resulting document.

Variables are indicated with "\" (backslash) symbols in the beginning and in the end,

➔ **Example:** `\CLIENT_NAME\`, `\CLIENT_STREET1\`, `\CLIENT_PHONE1\` etc.

Each variable represents a portion of data which will be inserted in its place when the document is saved.

 **Note:** Template can be edited without changing the variables wording and outlay (fonts and colors can still be changed).

Advanced users can learn about templates variables; add/delete them as necessary, customizing templates to the maximum.

See also:

Logic of Templates

Templates settings

17.1 Logic and syntax of templates

Variables

All variables and commands can be identified by \ (backslash) symbol in the beginning and in the end. In example below you can see `\CLIENT_NAME\`, `\CLIENT_STREET1\` and `\CLIENT_PHONE1\` variables:

To: `\CLIENT_NAME\`

Address: `\CLIENT_STREET1\`

Phone: `\CLIENT_PHONE1\`

When you use this template by clicking on **Save** or **Print** in some dialog box, `\CLIENT_NAME\` variable will be replaced by name of currently selected *client*, `\CLIENT_STREET1\` — by *client's street address* and `\CLIENT_PHONE1\` — by *client's phone number*. The final output will look like this:

To: XYZ Company

Address: Elm Street, 1

Phone: +1 212 898 11 31

 **Note:** Numerical values sometimes are surrounded by `fnum` command. This command simply tells the parser to round up the value to specified number of digits after decimal point (2 digits in the example below):

Job Total:

`\fnum(dtLinkJobs:TOTAL, 2)\`

Data Scan commands

Another of RTF templates is **Data Scan** commands. These are used to create tables in which number of rows is determined by the number of records in database.

➔ How to:

1. Begin by entering `\scan(dtLinkJobs)\` command. This must not necessarily be `dtLinkJobs`, depending on the template, this can be:

- `\scan(dtLinkJobs)\` — in *invoices*, templates, to display jobs included in invoice.
- `\scan(dtLinkInvoices)\` — in *payment* templates to display invoices linked to the payment.
- `\scan(dtLinkPayments)\` — in *invoice* templates to indicate linked sums.

2. Insert table header between `\scan(dtLinkJobs)\` and `\scanentry\`.

3. Insert one row of data-columns after `\scanentry\`. Every variable in table must be preceded with `dtlink` command. For instance if the table begins with `\scan(dtLinkJobs)\`, each variable must have this link included: `\dtLinkJobs:JOB_NAME\`, `\dtLinkJobs:COMPLETED\`, and so on.

4. Insert `\endscan\` after data-columns.

 **Note:** Use `noeof` to hide table's header and footer if the table body appears to be empty. For

instance, if your *invoice* includes only *jobs* and no *expenses*, the header and footer for *expenses* will not be saved/printed.

Example:

```
\scan(dtLinkJobs)\
```

PO No.	Delivered	Job Name	Service
\dtLinkJobs:PO\ D\	\dtLinkJobs:COMPLETE D\	\dtLinkJobs:JOB_NAM E\	\dtLinkJobs:SERV ICE\ E\

```
\scanentry\  
  
\scanfooter\  
  
Jobs Total: \JOBS_TOTAL\  

```

Command `\scan(dtLinkJobs)\` will make the parser scan (go from first record to the last one) all selected data in **Jobs** table (in this particular case all *jobs* included in the *invoice*) and output them to file or printer.

Text between `\scan(dtLinkJobs)\` command and `\scanentry\` command is table header.

Text between `\scanfooter\` and `\endscan\` commands will be considered table footer and will only be displayed once at the end of this table.

Text between `\scanentry\` and `\scanfooter\` commands is table "body". It includes variables from columns which must be listed in the table. In example above these are:

- `\dtLinkJobs:PO\` – Client PO Number.
- `\dtLinkJobs:COMPLETED\` – Date of job delivery.
- `\dtLinkJobs:JOB_NAME\` – Name of the job.
- `\dtLinkJobs:SERVICE\` – Service provided.

Condition checking

This allows the template to react to certain varying conditions and produce output suitable to each of possible conditions. The logic is the following `\IF(condition)\ Reaction \ENDIF\`.

Example:

If *Discount 1* is applied, display *discount name*, *discount value* and *subtotal*. The code is as follows:

```
\IF(DISCOUNT1)\  
  
\DISCOUNT1NAME\:\DISCOUNT1VALUE\  
  
Subtotal: \AFTERDISCOUNT1\endif
```

This will make the template check if discount 1 is applied, and if so — display data between `\IF(...)`

\ and \ENDIF\ commands.

- **DISCOUNT1** is a logical variable, i.e. it can have one of two values: either true or false. In this particular case, **TO3000, Version 10** sets **DISCOUNT1** into true if first discount is present and into false, if there is no first discount.
- When **\IF(DISCOUNT1)** is encountered in template, parser checks **DISCOUNT1** logical value, and if it is true, runs the code below this command, until **\endif** is encountered, which instructs parser to stop. If **DISCOUNT1** is false, everything until **\endif** command is skipped.
- In this particular case, without **\IF(DISCOUNT1)** command, the parser would output empty string with: and empty **Subtotal**: in cases when there would not be discount. But with **\IF(DISCOUNT1)** command, in such cases above block is skipped in its entirety.

17.2 Common template variables

There are four categories of common variables accessible in all templates:

- User information variables;
- Current date variables;
- Client information variables;
- Client currency variable.

User information variables

VARIABLE:	DESCRIPTION:
\USER_NAME\	Registration name taken from your License Key. It cannot be modified within program.
\USER_CURRENCY\	Company's Base Currency

Date variables

VARIABLE:	DESCRIPTION:
\DATE\	Date in short format (for example, 10/4/2006)
\DATE_LONG\ or \LONGDATE\	Date in long format (for example, Monday, October 04, 2006)

Client information variables

This set is available in all templates where single *client* is known (all templates except **Profile** templates when used in **Master Profile**):

VARIABLE:	DESCRIPTION:
\CLIENT_NAME\	Name of client.
\CLIENT_CODE\	Code of client.
\CLIENT_CURRENCY\	Currency of client.
\CLIENT_MINFEE\	Minimum fee of client.
\CLIENT_PAYMENT_TERMS\	Payment terms of client.
\CLIENT_PAYMENT_TERMS_NOTES\	Additional notes on payment terms of client.

\CLIENT_ADDRESS\	Client address. This variable has pre-defined order. If address format is different in your country, you can use separate address items to include address into your customized template.
\CLIENT_STREET1\	Street address of client.
\CLIENT_STREET2\	Street address 2 (if available) of client.
\CLIENT_CITY\	City from client's profile.
\CLIENT_STATE\	State from client's profile.
\CLIENT_COUNTRY\	Country from client's profile.
\CLIENT_ZIP\	ZIP from client's profile.
\CLIENT_EMAIL1\	E-mail of client.
\CLIENT_EMAIL2\	Alternative e-mail 2 (if available) from client's profile.
\CLIENT_PHONE1\	Phone number of client from client's profile.
\CLIENT_PHONE2\	Alternative phone number 2 (if available) from client's profile.
\CLIENT_PHONE3\	Alternative phone number 3 (if available) from client's profile.
\CLIENT_PHONE4\	Alternative phone number 4 (if available) from client's profile.
\CLIENT_FAX	Fax number from client's profile.
\CLIENT_WEB\ or \CLIENT_WWW\	Web-site address from client's profile.
\CLIENT_MINFO\	Application information of client document was produced for.
\CLIENT_MWEB\ or \CLIENT_MURL\	URL (Web tab address) for application submission / information.
\CLIENT_INFO\	General Information about the client from client's profile.
\CLIENT_VATNUM\	VAT Number of client from client's profile.

 **Note:** \CLIENT_ADDRESS\ variable has pre-defined order. If address format is different in your country, you can use separate address items to include address into your customized template.

Usage of special comma-terminated variables `\CLIENT_STREET1_C\`, `\CLIENT_STREET2_C\`, `\CLIENT_CITY_C\`, `\CLIENT_STATE_C\`, `\CLIENT_COUNTRY_C\`, `\CLIENT_ZIP_C\` is necessary if you would like parts of address to be separated by commas. You can as well insert commas directly into template but in this case unnecessary commas may appear even if some variable (like second line of street address) is left empty.

See also:

Logic of Templates

17.3 Locale settings and date format

There are two ways of configuring locale format:

1. In *TO3000, Version 10* (for each *Client* individually):

- open **Client** window and click **Main** tab;
- click **Locale Format** button in client profile;
- select **Custom locale** in the drop-down list next to **Generation of RTF files:** string;
- configure the code in **Short Date Format** or **Long Date Format** to include 4-5 capital M letters (like *dd.MMMM.YYYY*).

 **Note:** Please note that **Long Date Format** for "long" date variables: `\DATE_DUE_LONG\`, `\INVOICE_DATE_LONG\`, and so on. Settings in **Short Date Format** will affect regular variables, like `\DATE_DUE\`, `\INVOICE_DATE\`, and so on.

2. In *Windows Control Panel* (these settings are used as default in *TO3000, Version 10*):

- open *Windows Control Panel*
- double-click **Regional and Language Options**
- click **Customize** button on **Regional Options** tab
- click **Date** tab
- configure long (or short) date format options to include 4-5 capital M letters (like *dd.MMMM.YYYY*). To remove day of the week from view, delete extra "d" letters, so that no more than 2 "d-s" are present in the code string.

17.4 Date and time functions

In most cases database stores complete date and time. Certain commands can be used to customize the format of output date and time data (you may want to output only the *day* of the *week* or only the time etc.).

The following date and time functions can be used in all templates:

- fmdt
- wd
- date
- time

 **Note:** These functions return value according to [Regional and Language Options](#) settings in your system. These options can be changed with the help of your [Windows Control Panel](#).

The same variable will be displayed in different way depending on the function used.

FUNCTION:	VARIABLE VALUE:	FUNCTION APPLIED:
fmdt	9/20/06 6:00 PM	Wednesday, September 20, 2006 6:00 PM
	9/20/06	Wednesday, September 20, 2006
wd	9/20/06 6:00 PM	Wednesday
	9/20/06	Wednesday
date	9/20/06 6:00 PM	09/20/06
	9/20/06	09/20/06
time	9/20/06 6:00 PM	6:00 PM
	9/20/06	(empty row)

Date and time functions are accessible in all templates and can be applied to:

- All variables from datasets which return date and time.
- All variables from the following table:

VARIABLE:	TYPE:	DESCRIPTION:
\PROJECT_DATE_STARTED\	Project template variable	Date when the <i>project</i> was started in following format: 9/20/2006.
\PROJECT_DATE_DEADLINE\	Project template variable	<i>Project</i> deadline in following format: 9/20/2006.
\PROJECT_DATE_COMPLETED\	Project template variable	Date of the <i>project</i> completion in following format: 9/20/2006.
\ASSIGNED\	Client Jobs template variable	Date when the <i>job</i> was assigned in following format: 9/20/2006.
\DEADLINE\	Client Jobs template variable	<i>Job</i> deadline in following format: 9/20/2006
\COMPLETED\	Client Jobs template variable	Completion date in following format: 9/20/2006.
\DONE\	Client Jobs template variable	Completion date in following format: 9/20/2006.
\START\	Quotes template variable	Date assigned in following format: 9/20/2006.
\ESTSTART\		
\COMPLETION\	Quotes template variable	Deadline date in following format: 9/20/2006.
\ESTCOMPLETION\		

Syntax

Date and time functions are added to the variable in the following way:

\function(VARIABLE)\

➔ **Example**

To add wd function to \ASSIGNED\ variable from the *client jobs* template, change the variable syntax in the following way:

\wd(ASSIGNED)\

The result will be the day of the week, when the *job* was assigned (e.g. Wednesday).

See also:

Logic of Templates

17.5 Project template variables (With Projects Mode only)

These variables can be used in Project templates, as well as in any job or job assignment templates.

VARIABLE:	DESCRIPTION:
\PROJECT_NAME\	Name of <i>project</i> .
\PROJECT_CODE\	<i>Project</i> code.
\PROJECT_CLIENT_NAME\	<i>Client project</i> created for.
\PROJECT_CLIENT_CODE\	<i>Client</i> reference number.
\PROJECT_INFO\	Information about the <i>project</i> .
\CLIENT_PM_NAME\	Client <i>project manager</i>
\PROJECT_DATE_STARTED\	Date when <i>project</i> was started in following format: 10/4/2006.
\PROJECT_DATE_DEADLINE\	<i>Project</i> deadline in following format: 10/4/2006.
\PROJECT_DATE_COMPLETED\	Date of <i>project</i> completion in following format: 10/4/2006.
\PROJECT_DATE_STARTED_LONG\	Date when <i>project</i> was started in following format: Monday, October 04, 2006.
\PROJECT_DATE_DEADLINE_LONG\	<i>Project</i> deadline in following format: Monday, October 04, 2006.
\PROJECT_DATE_COMPLETED_LONG\	Date of <i>project</i> completion in following format: Monday, October 04, 2006.

See also:

Logic of Templates

17.6 Contacts template variables

These variables are used in any template mentioning client's details.

VARIABLE	DESCRIPTION
\SALUTATION\ \SAL\ \CONTACT_SALUTATION\	For example: "Mr.", "Ms.", "Mrs." etc.
\CONTACT_TITLE\ \TITLE\	<i>Contact</i> title.
\CONTACT_NAME\ \PM_NAME\ \ATTENTION\	<i>Contact</i> name.
\CONTACT_EMAIL1\	<i>Contact</i> email address.
\CONTACT_EMAIL2\	<i>Contact</i> email address 2 (if available).
\CONTACT_PHONE1\	<i>Contact</i> phone number.
\CONTACT_PHONE2\	<i>Contact</i> phone number 2 (if available).
\CONTACT_FAX\	<i>Contact</i> fax number.
\CONTACT_NOTES\ \NOTES\	<i>Contact</i> notes.

See also:

Logic of Templates

17.7 Quotes template variables

Using variables of quote templates you can construct templates either for your reference or for sending to client by email or fax.

Common Quote Variables

VARIABLE	DESCRIPTION
\QUOTE_NAME\ \QUOTE_CODE\ \CODE\ \SERVICE\ \REQUEST\ \ANSWER\ \VOLUME\ \PRICING\ \TYPE\ \PRICE\ \UNITS\ \TOTAL\ \DATE_SENT\ \SENT	Possible quote name.
\QUOTE_CODE\ \CODE\ \SERVICE\ \REQUEST\ \ANSWER\ \VOLUME\ \PRICING\ \TYPE\ \PRICE\ \UNITS\ \TOTAL	Quote code.
\SERVICE\ \REQUEST\ \ANSWER\ \VOLUME\ \PRICING\ \TYPE\ \PRICE\ \UNITS\ \TOTAL	Service name.
\REQUEST\ \ANSWER\ \VOLUME\ \PRICING\ \TYPE\ \PRICE\ \UNITS\ \TOTAL	Request for quote.
\ANSWER\ \VOLUME\ \PRICING\ \TYPE\ \PRICE\ \UNITS\ \TOTAL	Answer to request for quote.
\VOLUME\ \PRICING\ \TYPE\ \PRICE\ \UNITS\ \TOTAL	Quote volume.
\PRICING\ \TYPE\ \PRICE\ \UNITS\ \TOTAL	Quote type.
\PRICE\ \UNITS\ \TOTAL	Quote price.
\UNITS\ \TOTAL	Quote units.
\TOTAL	Quote total.
\DATE_SENT\ \SENT	Date sent in following format: 10/4/2006.
\DATE_SENT_LONG\ \LONGSENT	Date sent in following format: Monday, October 04, 2006.
\START\ \ESTSTART	Date assigned in following format: 10/4/2006.
\START_LONG\ \LONGESTSTART	Date assigned in following format: Monday, October 04, 2006.
\COMPLETION\ \ESTCOMPLETION	Deadline date in following format: 10/4/2006.
\LONG_COMPLETION\ \LONGESTCOMPLETION	Deadline date in following format: Monday, October 04, 2006.
\COUNT_NOTES	CATCount notes.
\STATUS	Status of quote (unknown, accepted, r ejected)

Draft Client Job variables for Quotes to Clients

The following variables refer to draft client jobs, added to quote to client.

VARIABLE	DESCRIPTION
\DTMULTIQUOTEITEMS:QI_NAME\	Name of draft client job.
\DTMULTIQUOTEITEMS:GROUP_NAME\	Group of services of draft client job.
\DTMULTIQUOTEITEMS:SERV_NAME\	Service name of draft client job.
\DTMULTIQUOTEITEMS:UNIT_NAME\	Units in which draft client job volume is specified.
\DTMULTIQUOTEITEMS:QI_PRICE\	Price of draft client job.
\DTMULTIQUOTEITEMS:QI_VOLUME\	Volume of draft client job.
\DTMULTIQUOTEITEMS:QI_FEE_KIND\	Type of price set for client job (can be <i>per unit</i> , <i>flat fee</i> , or <i>free</i>).
\DTMULTIQUOTEITEMS:QI_TOTAL\	Draft client job total.
\DTMULTIQUOTEITEMS:QI_COUNTNOTES\	CATCount notes of draft client job (if job volume had been entered with the help of CATCount).

See also:

Logic of Templates

17.8 Client Jobs template variables

Variables for templates from **New/Edit Job** dialog box can be used to construct document templates either for your reference during work process or for confirming job details to client.

VARIABLE	DESCRIPTION
\JOB_NAME\	<i>Job</i> name.
\JOB_CODE\ \CODE\	<i>Job</i> code.
\PO_CODE\ \PO\	Purchase order <i>client</i> issued for this <i>job</i> .
\CLIENT_REF\	<i>Client</i> reference number in accounting system of <i>client</i> .
\SERVICE\	<i>Service</i> name.
\GROUP_NAME\	<i>Group of Services</i> name.
\INSTRUCTIONS\	<i>Job</i> instructions.
\WORK_NOTES\	Work notes.
\VOLUME\	<i>Job</i> volume.
\TYPE\	<i>Job</i> type (for example: per unit, flat fee, free)
\PRICE\	<i>Job</i> price.
\UNITS\	<i>Job</i> units.
\TOTAL\	<i>Job</i> total.
\ASSIGNED\	Date when <i>job</i> was assigned in following format: 10/4/2006.
\ASSIGNED_LONG\ \LONGASSIGNED\	Date when <i>job</i> was assigned in following format: Monday, October 04, 2006.
\DEADLINE\	<i>Job</i> deadline in following format: 10/4/2006.
\DEADLINE_LONG\	<i>Job</i> deadline in following format: Monday, October 04, 2006.

\LONGDEADLINE\ \COMPLETED\ \DONE\ \COMPLETED_LONG\ \LONGCOMPLETED\ \COUNT_NOTES\ \INVOICE_CODE\ \INVOICE\ \INVOICE_GLOBAL_CODE\ \INV_GLOBAL	 Completion date in following format: 10/4/2006. Completion date in following format: Monday, October 04, 2006. CATCount or AnyCount notes. <i>Invoice</i> code. <i>Invoice</i> global code.
--	---

See also:

Logic of Templates

17.9 Invoice template variables

Date and code

VARIABLE	DESCRIPTION
\STATUS\ \DATE_DUE\ \SETTLEMENT_DATE\ \DATE_DUE_LONG\ \SETTLEMENT_LONGDATE\ \DUE_DATELONG\ \INVOICE_DATE\ \INV_DATE\ \INVOICE_DATE_LONG\ \INV_LONGDATE\ \INVOICE_CODE\ \INV_CODE\ \INVOICE_GLOBAL_CODE\ \INV_GLOBAL\ \INV_GLOBALLONG	Invoice status (For example: "Expected within 30 days", "Settled 5 days earlier" and so on.) Date when invoice is due in following format: 10/4/2006 Date when invoice is due in following format: Monday, October 04, 2006 Date invoice sent in following format: 10/4/2006 Date invoice sent in following format: Monday, October 04, 2006 Invoice code Invoice global code

Invoice totals

VARIABLE	DESCRIPTION
\INVOICE_TOTAL\ \INVOICE_TOTAL_BASE\ \JOBS_TOTAL\ \JOBS_TOTAL_B\ \NET_JOBS_TOTAL\ \NET_JOBS_TOTAL_B	Invoice total <i>in client's currency</i> Invoice total <i>in base currency</i> Jobs total <i>in client's currency</i> Jobs total <i>in base currency</i> Jobs total with discounts <i>in client's currency</i> Jobs total with discounts <i>in base currency</i>

Taxes

VARIABLE	DESCRIPTION
\TAX1\	Indicates if the tax 1 has been added; used in algorithms (If tax 1 exists = True, if it doesn't = False)
\TAX1_NAME\	Tax 1 name
\TAX1_VALUE\	Tax 1 value <i>in client's currency</i>
\TAX1_VALUE_B\	Tax 1 value <i>in base currency</i>
\TAX2\	Used in algorithms (If tax 2 exists = True, if it doesn't = False)
\TAX2_NAME\	Tax 2 name
\TAX2_VALUE\	Tax 2 value <i>in client's currency</i>
\TAX2_VALUE_B\	Tax 2 value <i>in base currency</i>
\TAXES\	Indicates if the taxes in the Tax fields are set; used in algorithms (If any tax is set = True, if they are not = False)
\AFTER_TAX1\	Total <i>in client's currency</i> after Tax 1 applied
\AFTER_TAX1_B\	Total <i>in base currency</i> after Tax 1 applied

Discounts

VARIABLE	DESCRIPTION
\DISCOUNT1\	Indicates if the discount/markup in the Discount/Markup field is set; used in algorithms (If discount 1 exists = True, if it does not = False)
\DISCOUNT1_NAME\	Discount 1 name
\DISCOUNT1_VALUE\	Discount 1 value <i>in client's currency</i>
\DISCOUNT1_VALUE_B\	Discount 1 value <i>in base currency</i>
\DISCOUNT2\	Indicates if the discount/markup in the Discount/Markup field is set; used in algorithms (If discount 2 exists = True, if it does not = False)
\DISCOUNT2_NAME\	Discount 2 name
\DISCOUNT2_VALUE\	Discount 2 value <i>in client's currency</i>
\DISCOUNT2_VALUE_B\	Discount 2 value <i>in base currency</i>
\DISCOUNTS\	Indicates if the discounts/markups in the Discount/Markup fields are set; used in

	algorithms (If any discount is set = True, if there are no = False)
\AFTER_DISCOUNT1\	Total <i>in client's currency</i> after Discount 1 applied
\AFTER_DISCOUNT1_B\	Total <i>in base currency</i> after Discount 1 applied
\NET_JOBS_TOTAL\	Jobs total with discounts <i>in client's currency</i>
\NET_JOBS_TOTAL_B\	Jobs total with discounts <i>in base currency</i>

Payment status variables

VARIABLE	DESCRIPTION
\INVOICE_DUE\	Balance due <i>in client's currency</i>
\INVOICE_DUE_BASE\	Balance due <i>in base currency</i>
\INVOICE_PAID\	Total payments linked to this invoice <i>in client's currency</i>
\INVOICE_PAID_BASE\	Total payments linked to this invoice <i>in base currency</i>
\INV_IS_PAID\	Used in algorithms (If the invoice is paid = True, if it's not = False)
\BEFORE_ADJUSTMENTS\	Invoice total <i>in client's currency</i> , excluding adjustments
\BEFORE_ADJUSTMENTS_B\	Invoice total <i>in base currency</i> , excluding adjustments
\ADJUSTMENTS_VALUE\	Value of the adjustments <i>in client's currency</i>
\ADJUSTMENTS_VALUE_B\	Value of the adjustments <i>in base currency</i>
\ADJUSTMENTS_DESCR\	Description of the adjustments
\INVOICE_PAYMETHOD\	Invoice payment method. See Payment Methods topic
\INVOICE_PAYMETHOD_DESCR\	Payment method description. See Payment Methods topic

Jobs variables in invoice

The following variables refer to jobs added to invoice

VARIABLE	DESCRIPTION
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\DTLINKJOBS:CJOB_PONUMB\	Client PO of the job
\DTLINKJOBS:CJOB_NAME\	Client job name
\DTLINKJOBS:CJOB_SERV_NAME\	<i>Service</i> name.
\DTLINKJOBS:CJOB_GROUP_NAME\	<i>Group of Services</i> name.
\DTLINKJOBS:CJOB_ASSIGNED\	Date the client job was assigned
\DTLINKJOBS:CJOB_DEADLINE\	Deadline of client job
\DTLINKJOBS:CJOB_ISCOMPLETED\	Completed (Boolean: True/False)
\DTLINKJOBS:CJOB_COMPLETED\	Date the client job was completed
\DTLINKJOBS:CJOB_PRICE\	Price of client job
\DTLINKJOBS:CJOB_VOLUME\	Client job volume
\DTLINKJOBS:CJOB_FEE_KIND\	Pricing (per unit, flat fee)
\DTLINKJOBS:CJOB_RATE\	Exchange rate
\DTLINKJOBS:CJOB_TOTAL\	Job total <i>in client's currency</i>
\DTLINKJOBS:CJOB_TOTAL_B\	Job total <i>in base currency</i>
\DTLINKJOBS:CJOB_INSTRUCTION\	Instructions of client job
\DTLINKJOBS:CJOB_WORKNOTES\	Work notes of client job
\DTLINKJOBS:CJOB_COUNTNOTES\	CATCount notes of client job
\DTLINKJOBS:SERV_NAME\	Service name of client job
\DTLINKJOBS:UNIT_NAME\	Volume units of client job
\DTLINKJOBS:PROJ_CODE\	Project code of client job
\DTLINKJOBS:CJOB_CODE\	Client job code
\DTLINKJOBS:CJOB_CLCODE\	Client Ref. of the job
\DTLINKJOBS:CCON_NAME\	Client PM of the client job

See also:

Logic of Templates

17.10 Payments template variables

Basic payments template variables

The following variables can be used to create payment templates

VARIABLE	DESCRIPTION
\PAYMENT_CODE\ \CODE\ \PAYMENT_DATE\ \PDATE\ \PAYMENT_DATE_LONG\ \PLONGDATE\ \PAYMENT_NOTES\ \TOTAL_PAID\ \TOTAL\ \NOT_LINKED\ \LINKED\ \IS_LINKED\ \PAYMENT_NOTES\ \NOTES	<p><i>Payment</i> code.</p> <p>Date <i>payment</i> received in following format: 10/4/2006.</p> <p>Date <i>payment</i> received in following format: Monday, October 04, 2006.</p> <p>Notes about <i>payment</i>.</p> <p>Total paid.</p> <p>Amount not linked with <i>invoices</i>.</p> <p>Amount linked with <i>invoices</i>.</p> <p>Used in algorithms (If <i>payment</i> is linked with <i>invoice</i> = True, if it's not = False)</p> <p><i>Payment notes</i></p>

Linked invoice variables

These variables can add information from linked invoices to payment template

DATASET WITH COLUMN NAME	DESCRIPTION
\DTLINKINVOICES:IDATE\ \DTLINKINVOICES:ICODE\ \DTLINKINVOICES:GNUMB\ \DTLINKINVOICES:TOTAL\ \DTLINKINVOICES:OTHER\ \DTLINKINVOICES:ADJUST\ \DTLINKINVOICES:LINKED	<p>Linked <i>invoice</i> date.</p> <p>Linked <i>invoice</i> code.</p> <p>Linked <i>invoice</i> global code.</p> <p>Linked <i>invoice</i> total.</p> <p>The part of the linked <i>invoice</i> total covered by other <i>payments</i>.</p> <p>The sum of the <i>phantom payment</i> of the linked <i>invoice</i>.</p> <p>The part of the current <i>payment</i> total linked</p>

	to the <i>invoice</i> .
\DTLINKINVOICES:BALANCE\	Balance Due of the linked <i>invoice</i> .
\DTLINKINVOICES:DATEDUE\	Linked <i>invoice</i> due date.

See also:

Logic of Templates

18 AnyCount

Introduction

AnyCount is text count engine, which automatically calculates text volumes contained in a file (or a number of files). Counts can be produced in different volume units (words, characters with spaces, characters without spaces, lines, pages, custom units). **AnyCount** works with all most common file formats.

TO3000, Version 10 has built-in **AnyCount** to quicken and simplify job creation and expenses calculation for each job.

AnyCount 7.0 currently counts the following formats: *BMP, CHM, CSV, DOC, DOCX, GIF, HLP, HTM, HTML, JPG, MIF, ODP, ODS, ODT, PDF, PNG, PPS, PPT, PPTX, PUB, RAR, RTF, SDC, SDD, SDW, SLP, SXC, SXI, SXW, TXT, VSD, WPD, XLS, XLSX, XML, ZIP*.

In **TO3000, Version 10** **AnyCount** is used to quickly calculate volumes of new jobs and quotes. **AnyCount** options can be found in **New/Edit Draft Client Job**, **New Client Job (Edit Client Job)** and **New Quote (Edit Quote)** windows.

Counting files

In **TO3000, Version 10** **AnyCount** is used in the following way:

When creating a job or a quote, click **<=AnyCount** button to run **AnyCount**. It will automatically count required units in target files and enter the resulting number into the **Volume** field.

1. Select the volume units from the corresponding drop-down list.

 **Note:** If the units selected were not specified as "Used by AnyCount" you will not be able to perform the count. This option is available on the **AnyCount** tab of the **User Settings**. It was implemented to distinguish volume units, that cannot be used as text volume units (e.g. "hours").

2. Click **<=AnyCount** button.
3. Select the file to be counted in the **Open** window and either double click it or click **Open** button:
4. **AnyCount Engine** will count the text in selected file and enter count results are to the **Volume** field of the **New Client Job** window.
5. Expanded count report is added on the **AnyCount Notes** tab which appears after **AnyCount** is used:

Creating a client job based on counted file

Click **AnyCount** button on the **Client Job** tab of **Client** (*Without Projects Mode* only) or **Project** (*with Projects Mode* only) window. Select volume to count in and click **OK** button. Select a file to count. Once the count process is completed, **TO3000, Version 10** will create a new client job with the name of the counted file, and respective volumes and volume units.

See also:

www.anycount.com

CATCount

19 CATCount

Introduction

CATCount is a tool for calculating Computer Assisted Translation (CAT) cost. In **TO3000, Version 10** **CATCount** is used for accounting of computer assisted translation jobs. Primary functions of

- *translating* complex CAT Scheme (different rates and counts of different types of text) into a single text count number, i.e. **CATCount**.
- *importing* CAT counts from **Trados Translator's Workbench** and **Logoport** logs.
- *printing* of CAT Schemes together with original word counts.

CATCount options can be found in the following **TO3000, Version 10** windows: **New/Edit Draft Client Job**, **New Client Job (Edit Client Job)** and **New Quote (Edit Quote)** windows.

Interface

In **TO3000, Version 10** **CATCount** is used in the following way.

When you open **New Client Job** window you specify the job name, group and service at first. **CATCount** comes at a hand when you want to specify the volume of the job and calculate its cost using the CAT Scheme. The result will be automatically entered to the **Volume** field.

When you create a job or a quote and click **<=CATCount** button, you open **CATCount** window. With the help of this window you can enter word counts for different match types, and their respective rates. **CATCount** automatically calculates equivalent CAT count and enters resulting number into the **Volume** field.

Creating CAT counts

1. Click **<=CATCount** button in the **New/Edit Draft Client Job** , **New Client Job (Edit Client Job)** or **New Quote (Edit Quote)** window to open **CATCount** window.
2. Enter the number of words with different level of match (100% match, "fuzzy" match and so on), the percentage of full rate payment, i.e. the CAT Scheme. Once you have entered the values you can save the scheme clicking **Scheme > Save**. You can load it next time clicking **Scheme > Load**.

 **Note:** You can load word count analysis logs of **Trados Translator's Workbench** or **Logoport** using menu **Log > Load**.

3. Click **OK** to enter the **Total CATCount** number to the **Volume** field.

Expanded count report is added on the **CATCount Notes** tab which appears after **CATCount** is used.

See also:

<http://www.catcount.com>

AnyCount

20 Importing data into TO3000

Client data can be imported to [TO3000, Version 10](#) with the help of [TO3000, Version 10 Import Utility](#). It is downloaded and installed separately.

[TO3000, Version 10 Import Utility](#) is included in [TO3000, Version 10](#) setup:

<http://download.to3000.com/SetupTO3000v9.exe>

[TO3000, Version 10 Import Utility](#) supports data import from the following file formats:

- .xls (Microsoft Excel);
- .dbf (dBase 5, dBase III, dBase IV);
- .txt (Text);
- .csv (Comma Separated Values);
- .mdb (Microsoft Access).

20.1 Client data import procedure

To import data from the file of supported format please close [TO3000, Version 10](#) and launch [TO3000, Version 10 Import Utility](#).

1. Preparing to import

Select the format of the data file you are going to import.

Specify the file you are going to import.

To proceed to the main part of import procedure you need to prepare the source file. You can import data only to the list of **Target Fields** in [TO3000, Version 10 Database](#).

2. Target fields in TO3000, Version 10 database

1. If possible split up the data according to the fields available.

Example:

If you have address stored in one field, it is better to split it into several columns: *country*, *address 1*, *address 2*. If there are no appropriate fields for some piece of information, you can add the necessary fields manually: shut down the utility first and then add all necessary fields to the corresponding table (clients). See Custom Fields topic.

2. The newly created custom fields should appear in the end of the **Target Fields in TO3000 Database** list.

Price Group, **Price Service**, **Price Unit** and **Price Value** fields of the **Target Fields in TO3000 Database** fields were added to enable importing clients prices. **Price Value** cannot have negative value. Only one column should correspond to **Price Service** field.

Example:

If its value is a language pair, like "*English => French*", the string should be a single whole, not "*English*" in one column and "*French*" in another column. **Price Group** field is not mandatory, as its value is set "*Translation*" automatically, if other is not specified.

3. Clients can have more than one price (more than one service in other words).

Example:

Supposing you need to import information about a client, which has two prices: *English => French* price and *English => Japanese* price. To complete importing successfully, you need to duplicate the information about this client twice (according to the number of prices (services)):

Client	...	Language Pair	Units	Price
Alter Ego Solutions	...	English => French	words	0.01

Alter Ego Solutions	...	English => Japanese	words	0.12
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To avoid creating two "*Alter Ego Solutions*" client records in [TO3000, Version 10](#) database, set **Import Mode** to **Import New** and specify the list of fields, by which it can be determined that current client has been already imported and only price data should be imported now. For details on setting Import Mode value and specifying the list of fields see [Selecting columns to import](#).

3. Linking source document to target fields

Creating links between data meant for importing and corresponding [TO3000, Version 10](#) fields is different for each source file format. For details see respective topic:

Importing from .xls

Importing from .dbf

Importing from .txt

Importing from .csv

4. Regional settings: Base Formats

Decimal separator – set a character, which delimits the decimal parts of the imported numbers.

Thousand separator – set a character, which separates the digit groups in the imported numbers.

Date separator – set a character, which separates the groups in the imported dates.

Time separator – set a character, which separates the groups in the imported times.

Short date, **Long date**, **Short time**, **Long time** – use these edit fields to set the date and time formats.

Boolean True – set some variants of TRUE value representation in the imported table, e.g. 'Yes' or '+'. Use new line for each new variant.

Boolean False – set some variants of FALSE value representation in the imported table, e.g. 'No' or '-'. Use new line for each new variant.

Null Values – set some variants of null value representation in the imported table, e.g. '0' or 'Empty'. Use new line for each new variant.

5. Regional settings: Data Formats

On **Data Formats** tab you can customize the format of each imported field in case when additional formatting is required. Select the field in the field list on the left and set its format in the proper edit fields.

Generator value – use this edit field to set the initial value of the autoincrement field.

Generator step – set the step of the autoincrement field. If it is 0 then the value of the generator

will be ignored.

Constant value – use this edit field to set the constant value of the field.

Null value – set the value, which will be understood as NULL to set the default value.

Default value – set the default value of the NULL field.

Left quote – set a character or a number of characters, which denote quoting in the imported string.

Right quote – set a character or a number of characters, which denote quoting in the imported string.

Quote action – you can select **Add** to add quotation marks to the imported string, **Remove** to remove all the quotation marks from the imported string or **As Is** to save the original quotation marks.

Char case – set the case of the imported string. **As Is** saves the original string, 'Upper' sets the whole string to upper case, 'Lower' sets the whole string to lower case, 'UpperFirst' sets the first letter of the string to upper case, 'UpperFirstWord' sets the first letter of each word to upper case.

Char set – set the char set of the imported string to ANSI or OEM. 'As is' saves the original string char set.

Use **Replacements** part of the dialog box to set the replacement list for the selected field. Fill the list in the following format:

<Value-to-find>=<Replace-with-Value>.

Example

Set the following replacements for the field 'Continent':

'South America'='S. America'

'North America'='N. America',

that means, that all the values 'South America' of the field 'Continent' will be replaced with values 'S. America', and values 'North America' will be replaced with 'N. America' respectively.

6. Selecting columns to import

The **Import Mode** property allows you to define actions executed while importing data. The following values are available:

- **Insert All**: inserts all the records from the source file to the target object.
- **Insert New**: Inserts records which are not in the target object yet, others are skipped.
- **Update**: Updates those records that already exist in the target object, others are skipped.
- **Update Or Insert**: Updates existing records and inserts new records.

All options except **Insert All**, require specifying the key fields, by which it can be determined if TO3000, Version 10 database contains this record already (select the fields from the list on the left and add them to Selected Columns using buttons with arrows). Usually client name and country are selected.

Import all records option – check this option to import all records from the source table.

Import only ... first record(s) – if you do not want all the records to be imported, set a number of records to import them from the source file. In this case only this number of records (beginning from the first one) will be imported.

20.2 Importing from .xls

With TO3000, [Version 10 Import Utility](#) you can import data from your .xls files directly to TO3000, [Version 10](#) database.

To link source and target fields:

1. Select the required target field from the **Target Fields in TO3000 Database** list.
2. Select the corresponding cell of .xls file in the preview area by clicking row or column caption using *Ctrl* key (the corresponding row or column will become blue highlighted).
3. Once both *target* and *source* fields have been selected, press *Enter* (the corresponding row or column will become green highlighted).

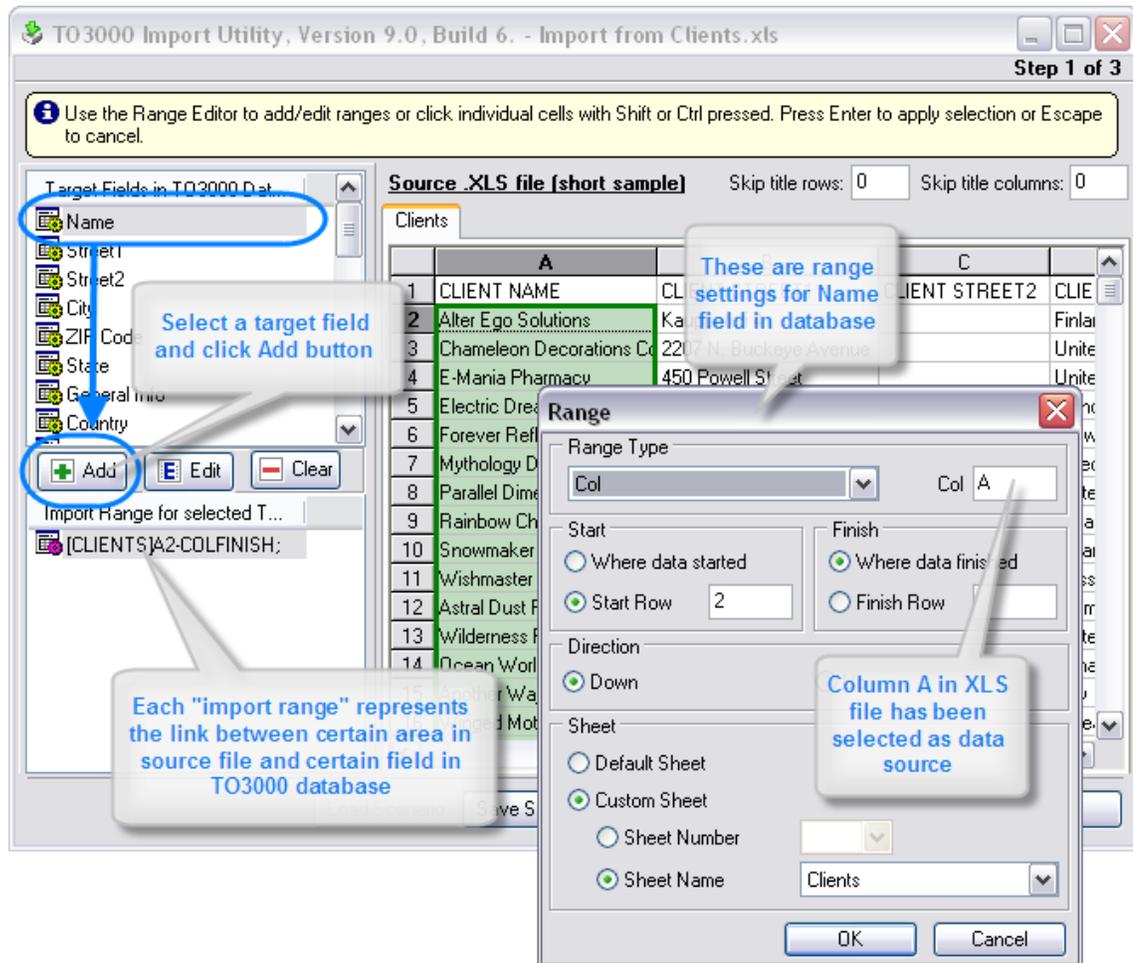
Alternatively, select target field, click **Add** button and specify which column to link.

After you select all the corresponding cells for the current table field, proceed to another field and repeat all these operations for each dataset field.

If you do not want some first rows or columns of the source table to be imported, set the number of such rows in the **Skip title rows:** and **Skip title columns:** edit fields.

Example:

Below the link was established between **Name** field in TO3000, [Version 10](#) and column A of Microsoft [Excel](#) file.



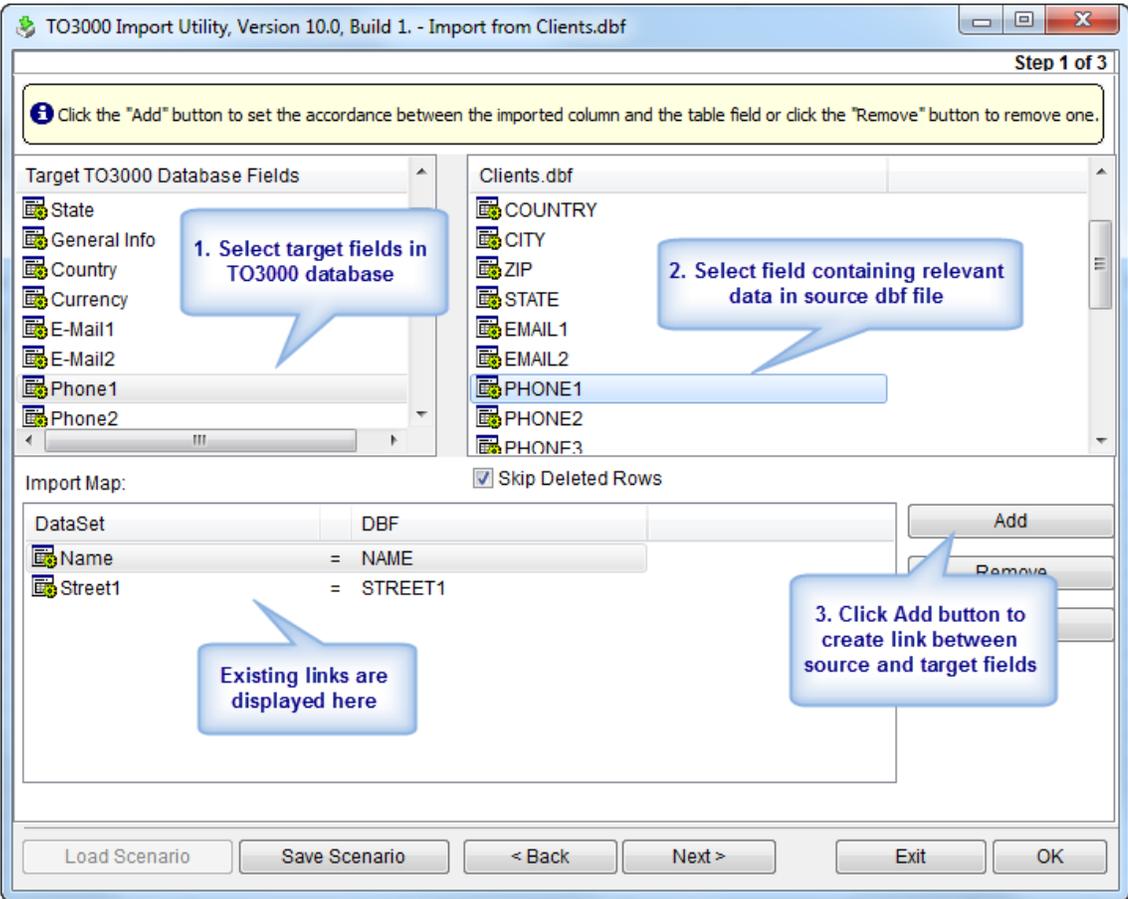
20.3 Importing from .dbf

With TO3000, Version 10 Import Utility you can import data from your .DBF files directly to TO3000, Version 10 database.

To link source and target fields:

- 1. Select the dataset field from the **Target TO3000 Database Fields** list.
- 2. Select the corresponding field in the **<TABLE_NAME> .dbf** list.
- 3. Click **Add** to create a link. These fields will be added to the list at the bottom of the window.

Repeat these operations for each dataset field. If you want to remove the accordance you set, select the linked fields in the bottom list and click **Remove**.



20.4 Importing from .txt

With [TO3000, Version 10 Import Utility](#) you can import data from your .txt files directly to [TO3000, Version 10](#) database.

To link source file areas and target fields:

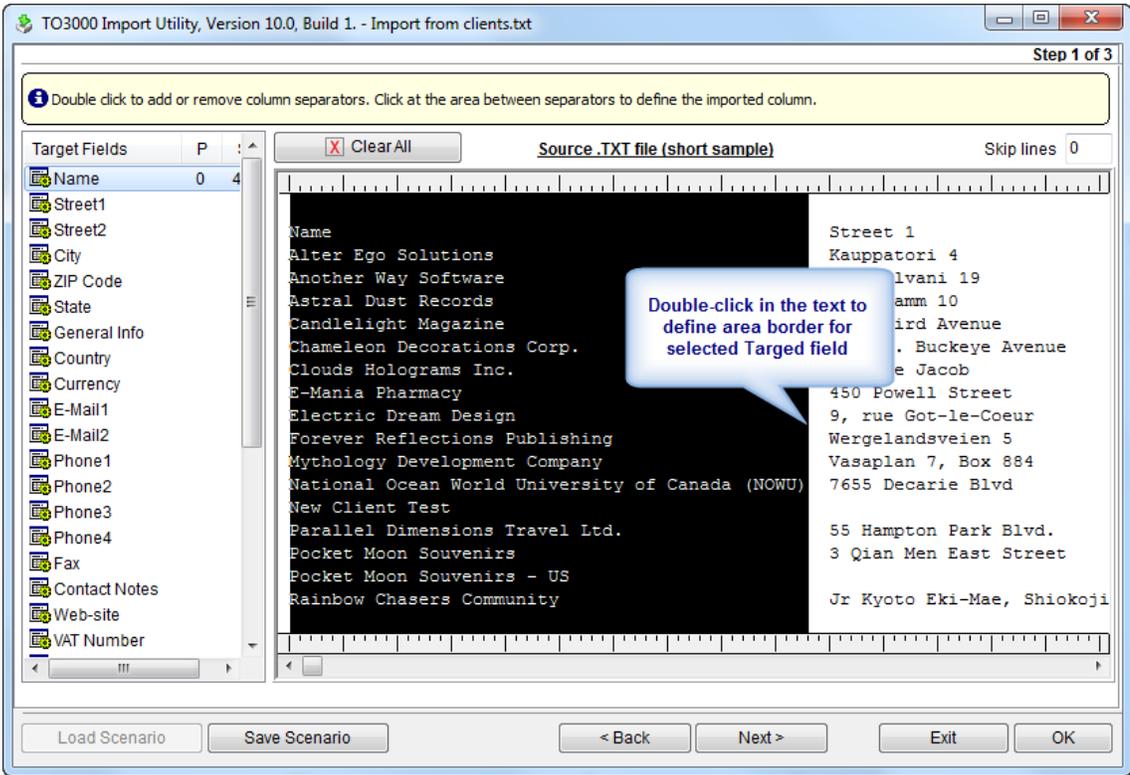
1. Select the dataset field from the **Target Fields** drop-down list.
2. Set two separator lines to delimit the source table column.

 **Note:** To associate the selected field with a column, the column itself should be enclosed by delimiters (there should be delimiters from both sides).

3. Double-click to add a border or delete one.
4. Drag separators to change the column width.
5. Right-click area between the two borders to select it as source for currently selected target field.

When you set the separators correctly, proceed to another field and repeat these operations for each dataset field.

If you do not want some first rows of the source table to be imported set the number of such rows in the **Skip ... first line(s)** edit field.



20.5 Importing from .csv

With TO3000, Version 10 Import Utility you can import data from your .csv files directly to TO3000, Version 10 database.

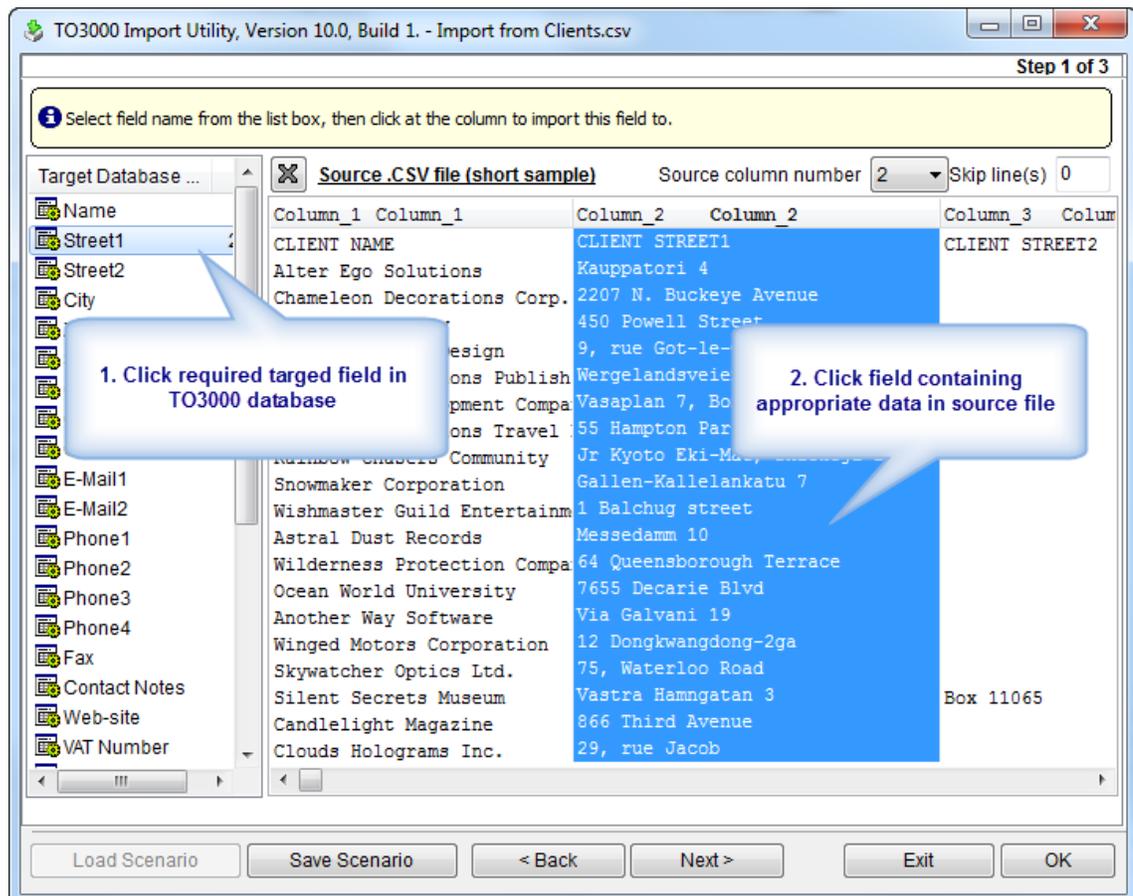
To start working with .csv file you need to specify delimiter (**Comma**) and text qualifier (**Quote**). You can select them manually from the corresponding drop-down lists or select **Auto** if you are not sure which delimiters are used in the file you import from.

If the delimiter you have defined on the first step was found in the source table, then you will find the table columns already separated and delimited.

1. Select the dataset field from the **Target Database Fields in TO3000 Database** drop-down list.
2. Click the corresponding source table column or set the column value manually in the **Source column number** field.

Repeat these operations for each dataset field.

If you do not want some first rows of the source table to be imported set the number of such rows in the **Skip line(s)** edit field.



20.6 Using scenarios for Import Utility

Scenarios in [TO3000, Version 10 Import Utility](#) are used to save all settings you have selected while importing in order to quickly use them during the future imports. For example, client profiles are expected to be imported quite frequently from client application forms.

You can save the scenario on any step clicking **Save Scenario** button. After opening this scenario lately you will not need to repeat all steps from the beginning and will start from the point, where you saved the scenario.

To open the previously saved scenario or the default one click **Load Scenario** button, it is available only from the tab where you select the format of the source file.

21 Exporting data from TO3000

It is a usual situation that you need to use data from [TO3000, Version 10](#) database in other applications.

[TO3000, Version 10 Local Report](#) option allows you easily exporting data to .rtf, .txt, .csv, .xls, .pdf, .html formats.

 **Note:** some kinds of data cannot be exported to certain formats, then the list of available formats becomes shorter.

To export [TO3000, Version 10](#) data:

1. Click **Export** button from **Local Report** group of buttons on **Button Panel**.
2. Select the necessary format from the drop-down list and click **OK**.

For details on exporting to different file formats please see:

Export to .rtf

Export to .txt

Export to .csv

Export to .html

Export to .xls

Export to .pdf

21.1 Export to .txt

Exporting [TO3000, Version 10](#) data to .txt format does not require specifying any additional options.

After selecting .txt in the Export window the standard [Windows Save As](#) dialog box appears where you can specify the target file name.

See also:

[Export to .rtf](#)

[Export to .csv](#)

[Export to .html](#)

[Export to .xls](#)

[Export to .pdf](#)

21.2 Export to .xls

In the **Export to Excel** window you can set properties of output file when exported in .xls format.

It opens when you select **.xls** from the **Export** to drop-down list on the Export window.

Settings for exporting to Excel

tab range:

- select **All** to export all tabs of the source;
- select **Current tab** to export only the tab you are currently viewing;
- select **tabs** and specify the numbers in the text box provided to print only certain tabs.

Export settings:

- select **Styles** to save style setting of the source when exporting;
- select **tab breaks** and tab breaks will be compulsively inserted in the .xls file;
- select **WYSIWYG** (What You See Is What You Get) to make the .xls file look exactly as the picture you see on the screen;
- select **Background** to keep the view of the background in the target .xls file;

To automatically open the new file after finishing export procedure select **Open Excel after export**.

See also:

Export to .rtf

Export to .txt

Export to .csv

Export to .html

Export to .pdf

21.3 Export to .csv

Exporting [TO3000, Version 10 data](#) to .csv format does not require specifying any additional options.

After selecting .csv in the Export window the standard [Windows Save As](#) dialog box appears where you can specify the target file name.

See also:

[Export to .rtf](#)

[Export to .txt](#)

[Export to .html](#)

[Export to .xls](#)

[Export to .pdf](#)

21.4 Export to .html

In the **Export to .html** window you can set properties of output file when exported in .html format.

It opens when you select **.html** from the **Export** to drop-down list on the Export window.

Settings for exporting to .html

tab range:

- select **All** to export all tabs of the source;
- select **Current tab** to export only the tab you are currently viewing;
- select **tabs** and specify the numbers in the text box provided to print only certain tabs.

Export settings:

- select **Styles** to save style setting of the source when exporting;
- select **Pictures** to enable exporting pictures from the source file;
- select **All in one folder** to store all newly created files of the .html tab in one folder;
- select **tab navigator** to add the tab navigator (see the screenshot below) to your new .html file



- select **Fixed width** to fix the width of the columns and rows of the exported tables (tables will not extract and contract according to the window size);
- select **Multitab** to export data to a multi-tab .html file;
- select **Mozilla browser** to export data to .html file specially adopted for Mozilla browser;
- select **Background** to keep the view of the background in the target .html file.

To automatically open the new file after finishing export procedure select **Open after export**.

See also:

Export to .rtf

Export to .txt

Export to .csv

Export to .xls

Export to .pdf

21.5 Export to .rtf

In the **Export to RTF** window you can set properties of output file when exported in .rtf format.

It opens when you select **.rtf** from the **Export** to drop-down list on the Export window.

Settings for exporting to .rtf

tab range:

- select **All** to export all tabs of the source;
- select **Current tab** to export only the tab you are currently viewing;
- select **tabs** and specify the numbers in the text box provided to print only certain tabs.

Export settings:

- select **Pictures** to enable exporting pictures from the source file;
- select **WYSIWYG** (What You See Is What You Get) to make the .rtf;
- file look exactly as the picture you see on the screen;
- select **tab breaks** and tab breaks will be compulsively inserted in the .rtf file;

To automatically open the new file after finishing export procedure select **Open after export**.

See also:

Export to .txt

Export to .csv

Export to .html

Export to .xls

Export to .pdf

21.6 Export to .pdf

In the **Export to .pdf** window you can set properties of output file when exported in .pdf format.

It opens when you select **.pdf** from the **Export** to drop-down list on the Export window.

Settings for exporting to .html

tab range:

- select **All** to export all tabs of the source;
- select **Current tab** to export only the tab you are currently viewing;
- select **tabs** and specify the numbers in the text box provided to print only certain tabs.

Export settings

- select **Compressed** to create a .pdf file of minimal size;
- select **Embedded fonts** to create a .pdf file with all used fonts embedded (like this you can be sure that you text will look the same on any computer, even if the fonts used are not installed there);
- select **Background** to keep the view of the background in the target .pdf file;
- select **Print optimized** to optimize the new .pdf file for printing at once.

See also:

Export to .rtf

Export to .txt

Export to .csv

Export to .html

Export to .xls

22 Mass action

Mass action in TO3000, Version 10 allows to quickly *invoice* multiple *projects* and *jobs*. Mass action can also be used to create payments and link them with all unpaid invoices.

The following types of mass action are available:

Mass invoicing

Mass payments from clients

22.1 Mass invoicing

Mass invoicing can be done from **Invoices to Clients** window. It allows to quickly invoice all or certain jobs stored in database.

1. To begin invoicing procedure, open **Invoices to Clients** tab and click **Mass Invoicing** button (shortcut Alt+M).

2. This will open **Mass Invoicing** window which should look like this:

- Select the *clients* whose *jobs* you wish to invoice by double-clicking check box in front of this client.
- Use **Local Client Filter** to select clients by certain criteria. The controls of this filter are the same as those of regular **Local Custom Filter**.
- Select check box **One Client Job per Invoice** if you wish a separate *invoice* to be created for each *client job*.
- Select **Include completed jobs only** to generate *invoices* only for *jobs* that are marked as finished in your database.

3. After selecting the required clients and setting up **Mass Invoicing** options, click **Generate** button. The program will begin creating invoices, which will be indicated by a **progress bar**.

4. Once all specified invoices have been generated, **Mass Invoicing** window will display the number of invoices generated against each *client*.

6. You can adjust **Local Client Filter** and check box settings and generate another set of invoices.

 **Note:** Once the *invoices* have been generated, they can be opened and edited in **Invoices to Clients** window or **Invoices tab** of **Client** window.

 **Note:** To quickly select multiple *clients* by certain criteria, first apply **Local Client Filter**, and then, once the list contains only clients you need — click **Select All** button.

22.2 Mass payments from clients

Multiple *payments from clients* can be created according to existing *invoices* and linked with them.

1. To open **Mass Payments** window, open **Payments from Clients** window first, and then click **Mass Payments** button (shortcut **Alt+M**).

2. This will open **Mass Payments** window:

- Select the *clients*, whose *invoices* you wish paid, by double-clicking check box in front of this client.
- Use **Local Client Filter** to select *clients* by certain criteria. The controls of this filter are the same as those of regular **Local Custom Filter**.
- Select check box **One Payment per Invoice** if you wish a separate *payments* to be created for each *client invoice*.
- Select **Phantom Payments** check box to generate phantom payments.

3. After selecting the required clients and setting up mass payment options, click **Generate** button. The program will begin creating payments. The process will be indicated by a **progress bar**.

4. Once all specified payments have been generated, **Mass Payments** window will display the number of new payments, created per each client.

5. You can adjust **Local Client Filter** and check box settings and generate another set of payments.

 **Note:** Once the payments have been generated, they can be opened and edited in **Payments from Clients** window or **Payments** tab of **Client** window.

 **Note:** To quickly select multiple *clients* by certain criteria, first apply **Local Client Filter**. After clients in the list have been filtered, click **Select All** button.

23 Custom queries

SQL queries can be made to [TO3000, Version 10](#) database to extract and export required data. This feature recommended for users with basic knowledge of SQL.

Structured Query Language (SQL) is a language of structured requests. It is intended for working with relational databases, which constitute the sets of interrelated data, stored in tables.

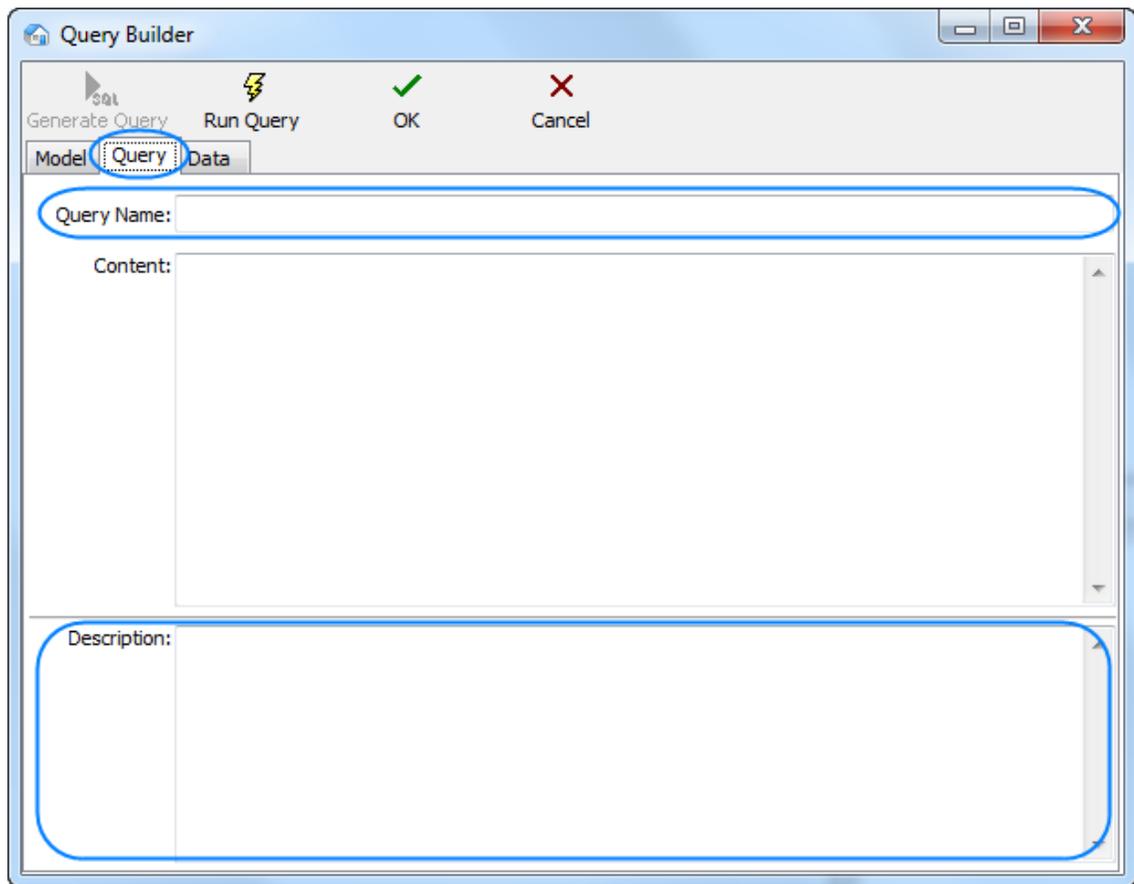
Currently SQL is a part of a large number of programs, executed on various types of computers. "Owing to its elegance and machine independence, as well as to the industrial leaders support in relational base technology, SQL was acknowledged the standard language and will keep this position in the foreseeable future." [2000, Mastering SQL, Martin Grubber]

Creating a query

User queries are built and managed with the help of Custom Queries section of [Advanced Settings](#) window of .

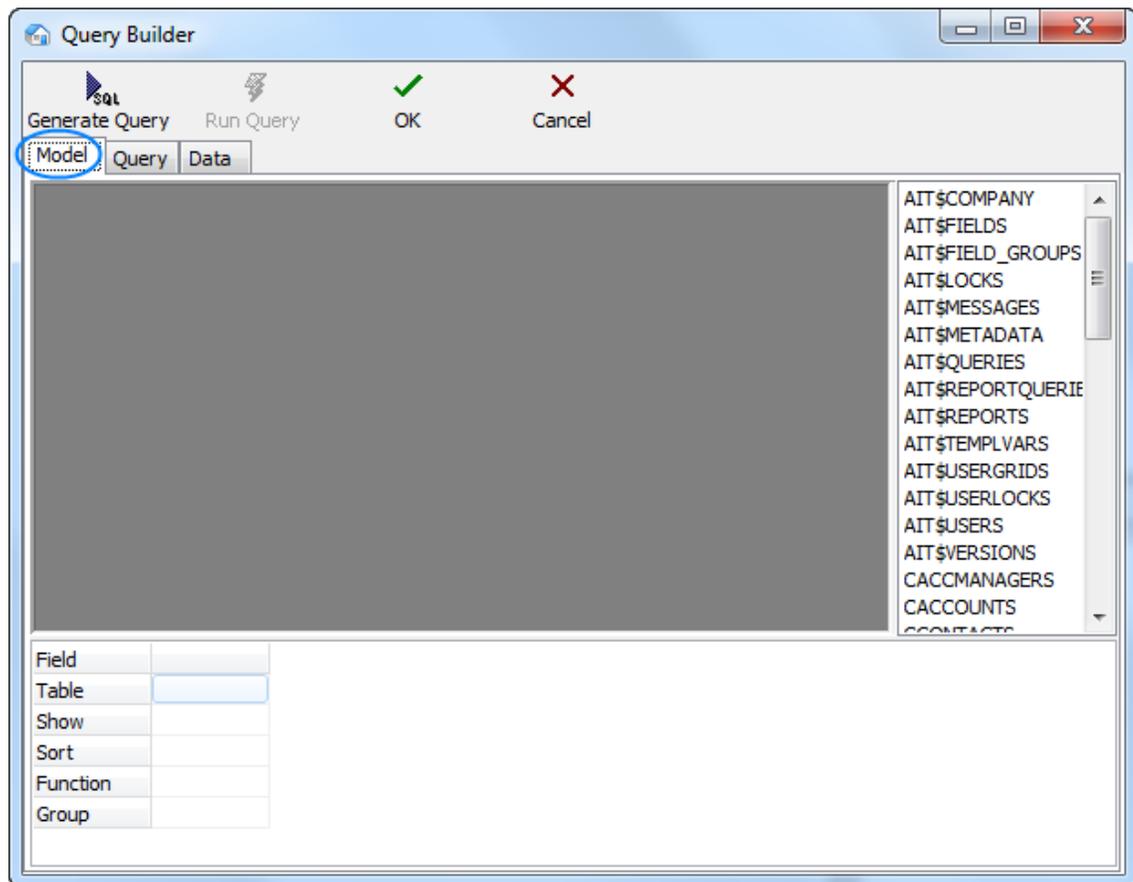
1. Beginning creating a query

Click the [New](#) button and the [Query Builder](#) window shown below appears. Enter the name of your query in the [Query Name](#) field, and (optionally) description of the new query in the [Description](#) field.



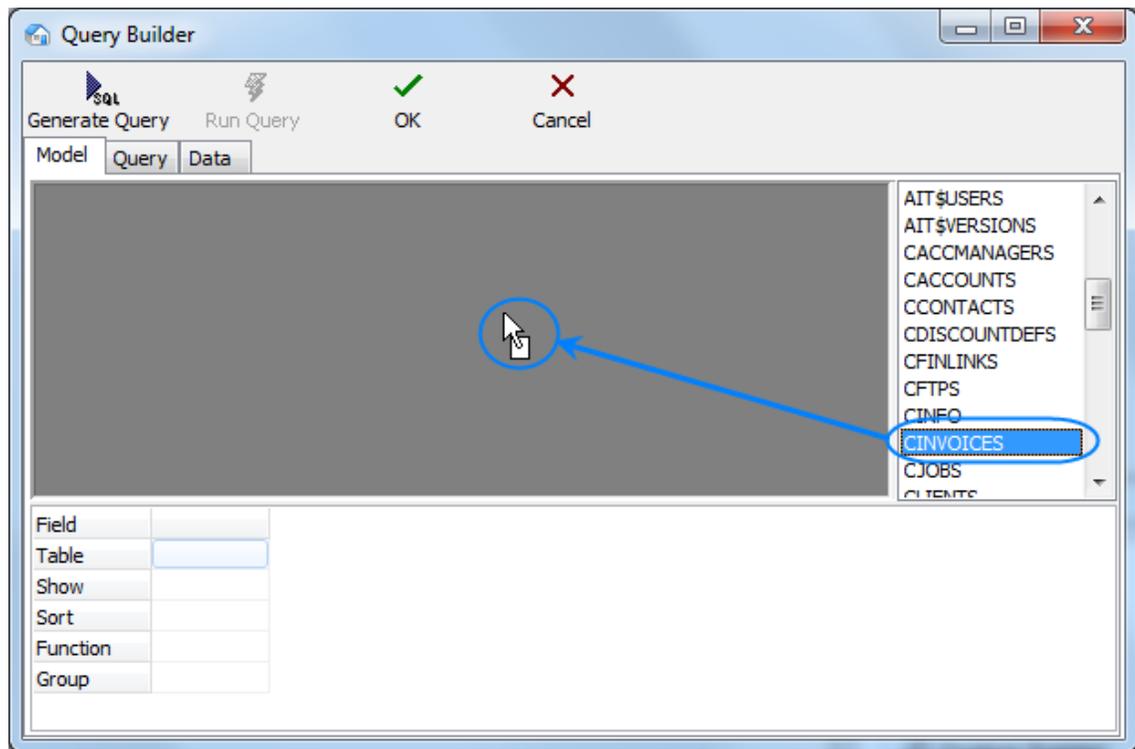
2. Beginning creating the model of the query

Switch to the **Model** tab:



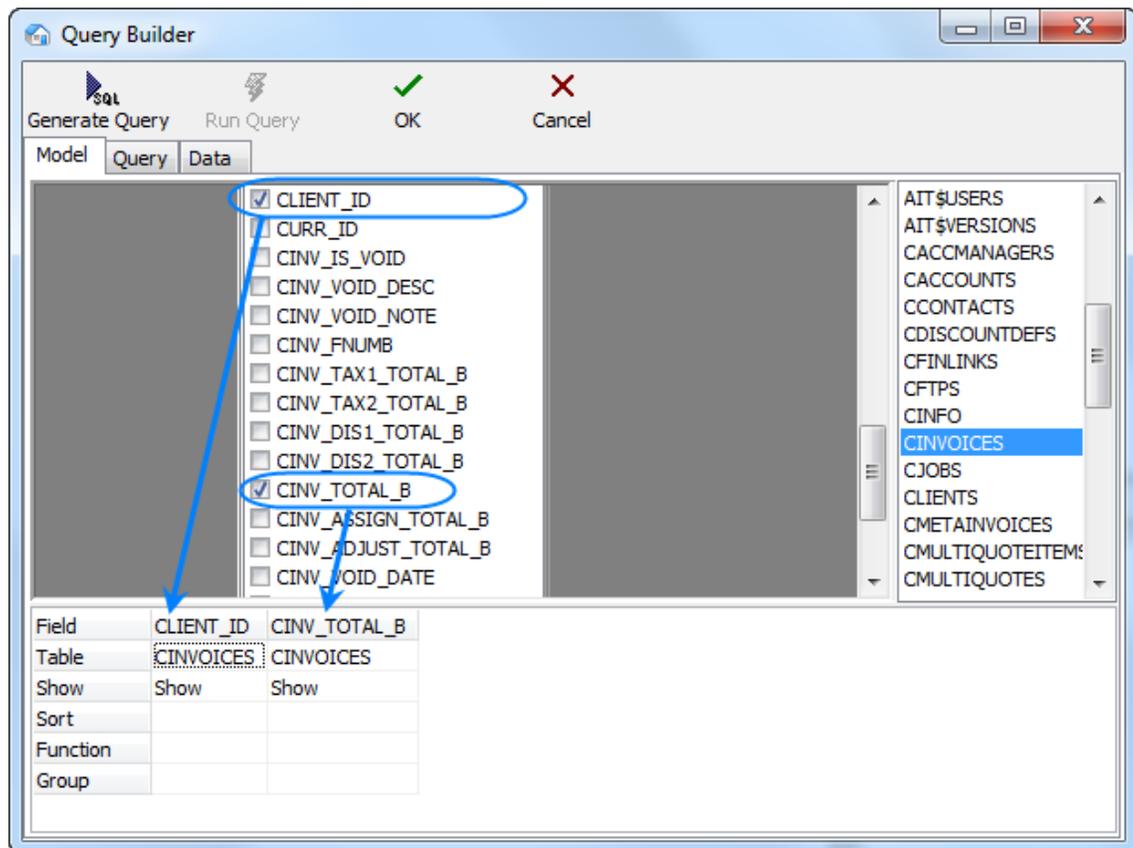
3. Selecting database tables

Locate the required tables on the list to the right (in this case – *CINVOICES* table) and drag them to the gray field of the **Model** tab of **Query Builder** window.



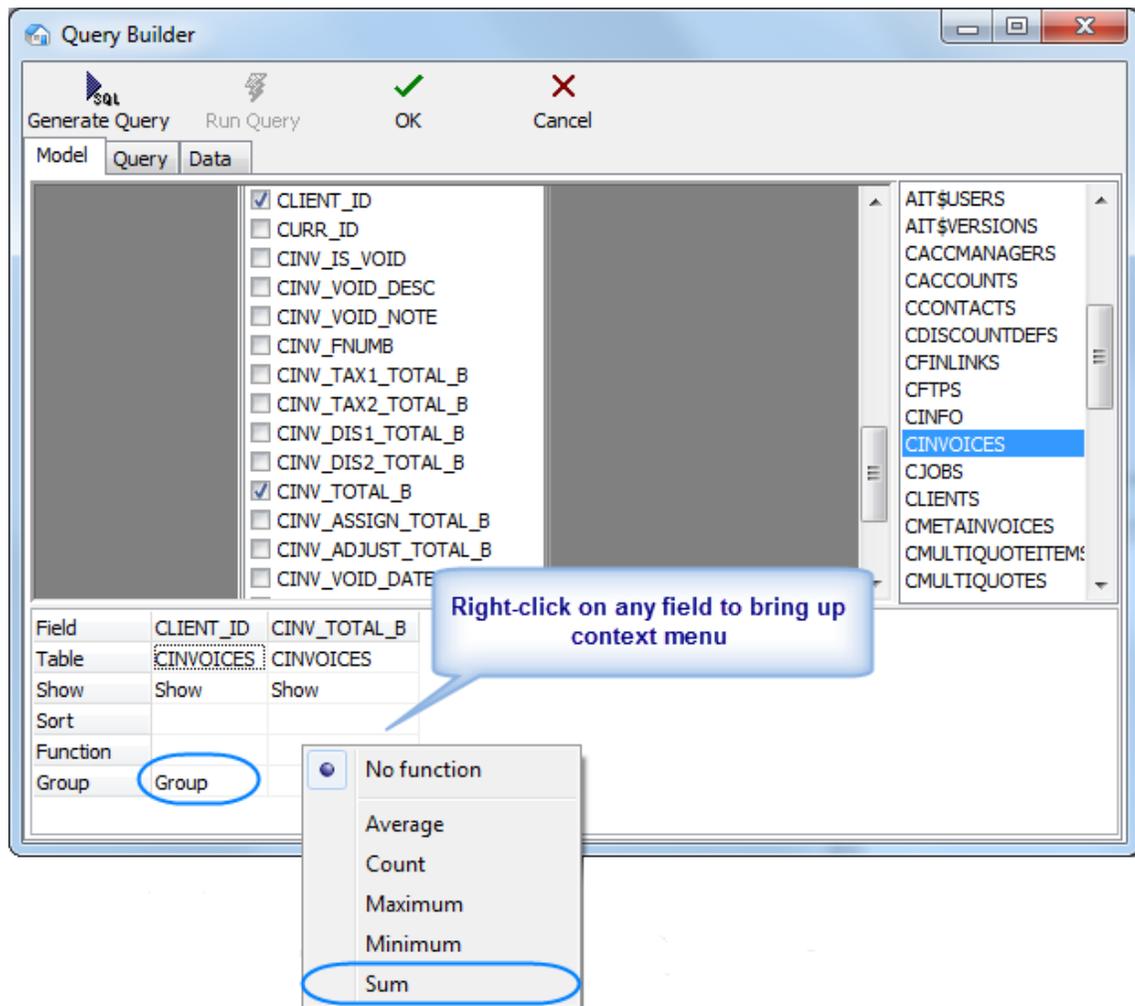
4. Selecting fields to be added to query

Select two fields, (in this case *CLIENT_ID* and *CINV_TOTAL_B* — client ID and sum of the invoice in basic currency) by clicking near the names of this fields in the table windows. These fields will appear in the lower area, which represents the list of selected fields.



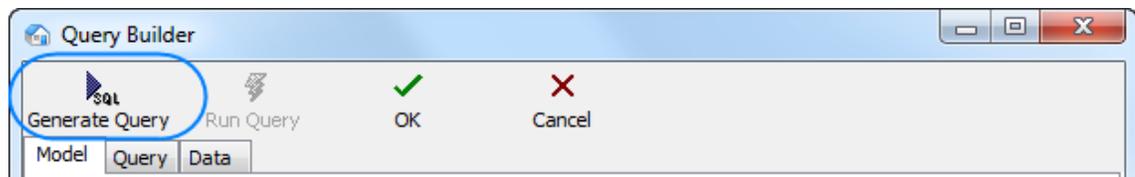
5. Assigning functions

Right-click on the cell where fields CLIENT_ID (the selected field) and GROUP (SQL section Group by) intersect and select the **Group** option. Similarly in the cell of intersecting CINV_TOTAL_B and **Function** fields we select the **Sum** option:

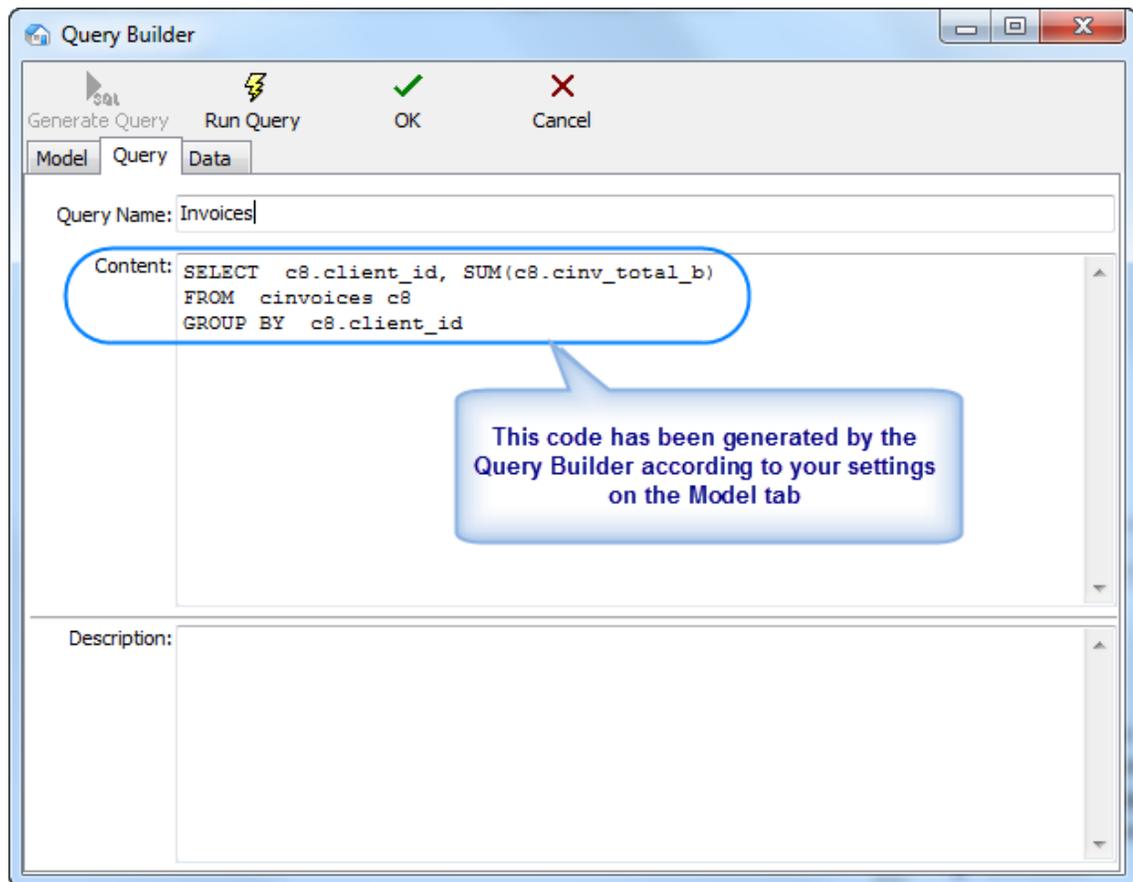


6. Generating query

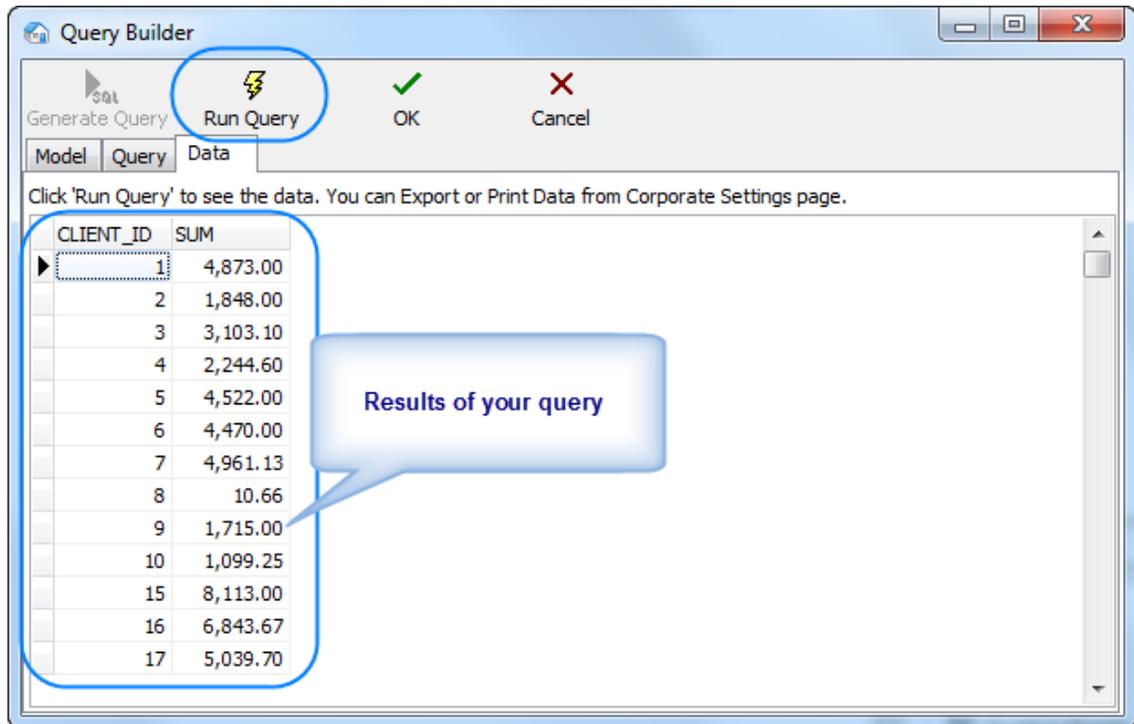
Click the **Generate Query** button.



Newly built SQL-query will appear.



Start executing the query (clicking **Run Query** button from the toolbar in the upper part of the window) and you will see the results.



 **Note:** Although for most basic queries you are not required to write the SQL code of the query manually, any additional code can be added by SQL-versed users to fully customize their queries. For example, the following strings can be added to this particular query:

```
SELECT FIRST 10 c4.client_id, SUM(c4.cinv_total_b),
(select client_name from clients where client_id = c4.client_id)
FROM cinvoices c4
GROUP BY c4.client_id
ORDER BY 2 DESC
```

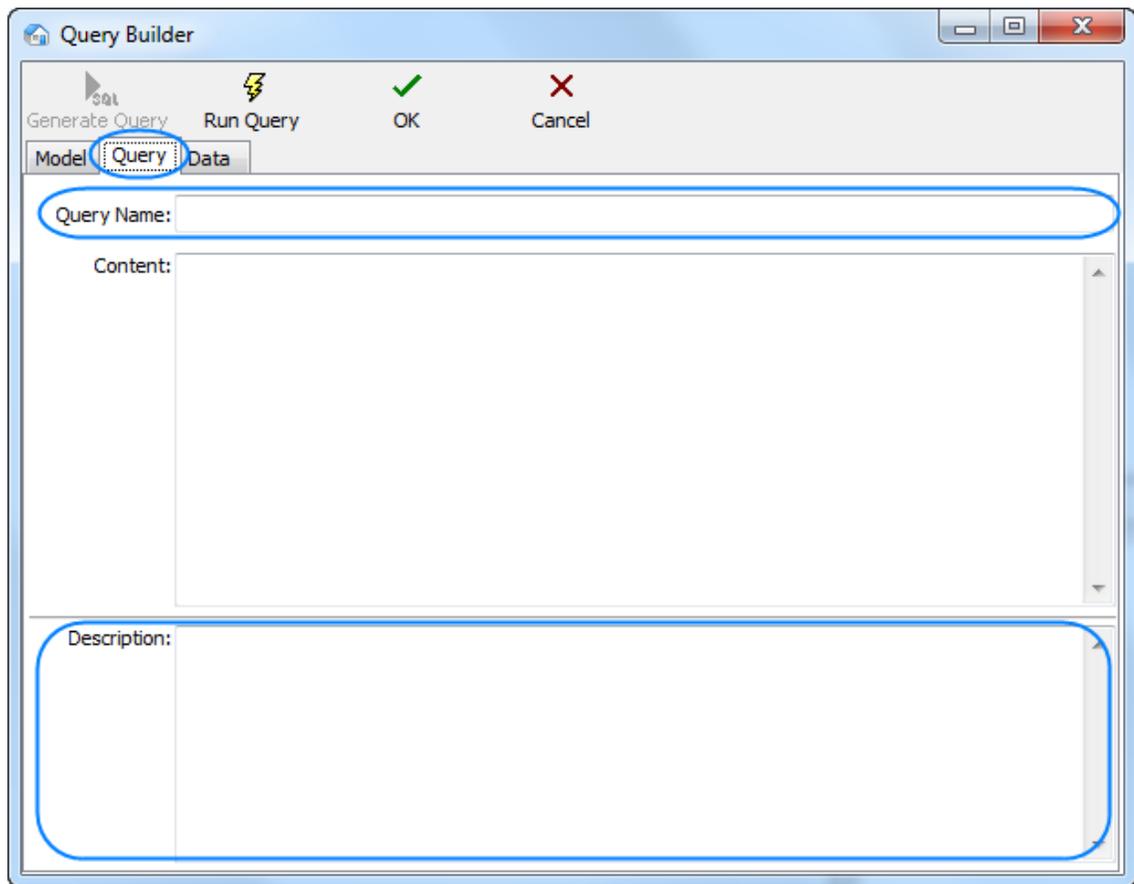
In simple words it will mean the following: To select first ten clients (first 10 client_id) by counting the sum of invoices and display them in the order of sum reduction (ORDER BY 2 DESC).

Click **Run Query** button once again to see the new result.

 **Note:** If you click **Generate SQL** after editing the query manually the query will be rebuilt and the results of your work will be lost.

7. Saving newly created query

To save the query model switch to the **Query** tab, specify the **Query Name** and **Description** (optionally) and click **OK** button.



See also:

Custom Reports

24 Custom reports

24.1 Viewing custom reports

Accessing reports

Custom reports are used to extract and view consolidated and summary printable information from the TO3000, Version 10 database.

To obtain any of custom reports click menu **Custom Reports > List**.

Report View Window

This window displays the list of all reports currently integrated in database.

Click **Preview** button to view the selected report.

Click **Print** button opens printer setup options dialog.

Click **Export** button to save the report result in a separate .rtf, .html., .pdf or .xls format. On **Export** button click the **Export** window opens where you can select the necessary format.

For details on exporting to each format please see topics:

Export to .html

Export to .rtf

Export to .xls

Export to .pdf

See also:

Example: creating a report

Exporting TO3000, Version 10 data

24.2 Managing custom reports

Custom Reports settings

Custom reports can be created edited and deleted with the help of TO3000, Version 10 **Advanced settings** window.

1. Click menu **Settings > Advanced**;
2. Click **Custom Reports** section to open *custom report* management options.

Custom report options

The following options are available for custom reports:

- **New/Edit/Delete** buttons can be used to create\modify\delete the selected report.
- **Edit Details** button provides access to the **Edit Custom Report** window where you can change report name and description.
- **Example: View/Set/Clear** buttons: use **Set** button to specify the date interval for the sample of selected report displayed when the report is accessed in TO3000, Version 10 menu **Custom Reports > List**. Use **View** button to see this sample and **Clear** to delete it.
- **Preview** button opens the **Preview** window where you can see how the selected report would look on paper and print it if needed.
- **Load** and **Save** buttons will allow you to download new reports from *.PXR2* report files (*importing*) and save the existing reports to *.PXR2* files for (*exporting*).

 **Note:** Custom reports which are displayed in **Custom Reports** section of TO3000, Version 10 **Advanced settings** window, are the ones currently integrated into TO3000, Version 10 database. *PXR2* files are used solely for export-import purposes, thus deleting *PXR2* file from *VAIT\Translation Office 3000 V9\Admin\Reports* will not delete any of the reports in database.

Exporting a custom report

To *export a custom report*, save required report in *.PXR2* file. This file can later be imported into another TO3000, Version 10 database.

1. Select the required *custom report* in the list.
2. Click **Save** button.
3. Specify name and location for *PXR2* file being saved.

Importing a custom report

You can import a custom report to your database from a *PXR2* file.

To *import a custom report*, use *PXR2* file to load required report.

1. Save *PXR2* file being imported to *\\AIT\Translation Office 3000 V9\Admin\Reports* folder.
2. Click **Load** button.
3. Locate *PXR2* file being imported, select it and click **Open** button.

Editing a custom report

To make changes to a custom report, select this report in the list and click **Edit** button. This button opens the **FastReport** window (report designer interface).

FastReport designer is a complex tool intended for IT specialists. It requires some basic *SQL* and *Delphi* knowledge. Step-by-step creation of simpler reports is described in Example: creating a report topic.

For detailed information please visit the [Fast Report Inc.](http://www.fast-report.com) Internet site: <http://www.fast-report.com>

Setting up a report example

Once a new report has been added to reports list, you can access this report by clicking menu **Custom Reports > List**. Unless it has a pre-set example, however, the preview field to the right will remain blank.

Click **Set** button of the **Custom Reports** section of *TO3000, Version 10 Advanced settings* window to set a new preview example of currently selected report .

Click **View** button to view current example of currently selected report.

Click **Clear** to delete current example of currently selected report.

See also:

Example: creating a report

Advanced Settings

24.3 Example: creating a report

This topic will cover the process of creating a simple custom report.

➔ **Example:**

To *create* a new *custom report*

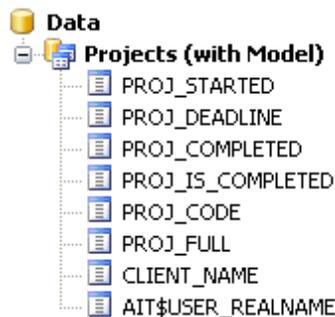
1. Click menu **Settings > Advanced**;
2. Click **Custom Reports** on **Advanced Settings** window.
3. Click **New** button; enter report name and description in the **New Custom Report** window and click **OK**.
4. Add data which should be used in the report by clicking menu **Report>Data** in **FastReport Designer** window (it will open automatically, once you click **OK** button).

This will open **Select Project Datasets** dialog window, in which all your Custom Queries are displayed. Select the required queries by selecting check boxes in front of their names. For this example we selected **Projects (with Model)** query, since we are composing a "Projects report".

Click **OK** button to confirm selection.

 **Note:** You can create your own custom queries with the help of built-in query builder. Any custom queries created this way will appear in this dialog window.

5. Now, contents of the selected query are displayed in the **Data** field to the right:

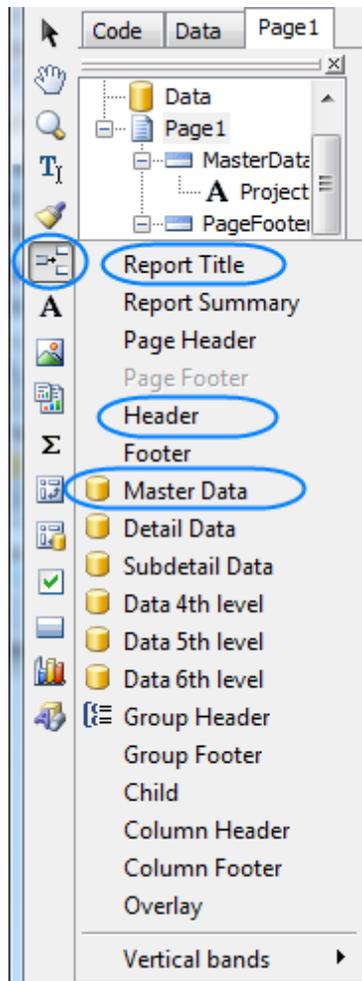


These are the fields from **TO3000, Version 10** database, which have been added to the query you selected. In this particular case, the fields are those, containing project names (**PROJ_FULL**) and codes (**PROJ_CODE**), dates of project timeline (**PROJ_STARTED**, **PROJ_DEADLINE** and **PROJ_COMPLETED**), information as to whether project has been completed or not (**PROJ_IS_COMPLETED**) and corresponding client names (**CLIENT_NAME**).

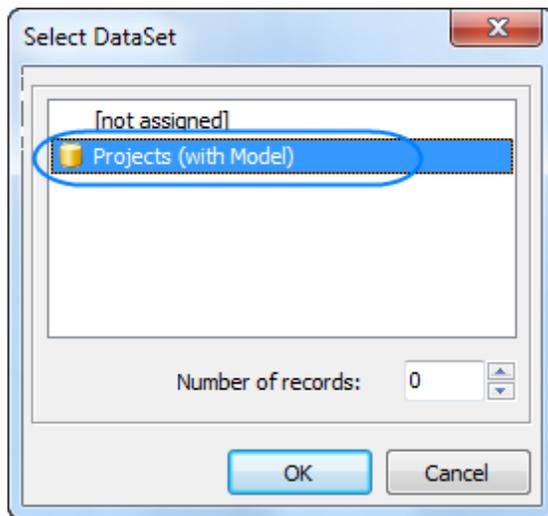
6. Begin designing your report by placing *Data Bands*.

These "bands" bind report elements together, specifying their location on the page relatively to page itself and to the other bands. More detailed description of the bands can be found in **FastReport User Manual**. For this particular report you will need to use only few of the bands available.

6.1. Click **Insert Band** button and select **Report Title** band. This will place mentioned band to your report page. Click **Insert Band** button again and select **Header band** to place it.



6.2. Click **Insert Band** button one more time and select **Master Data** band to place it in your report. When placing **Master Data** band select your **Projects (with Model)** query when prompted to do so:

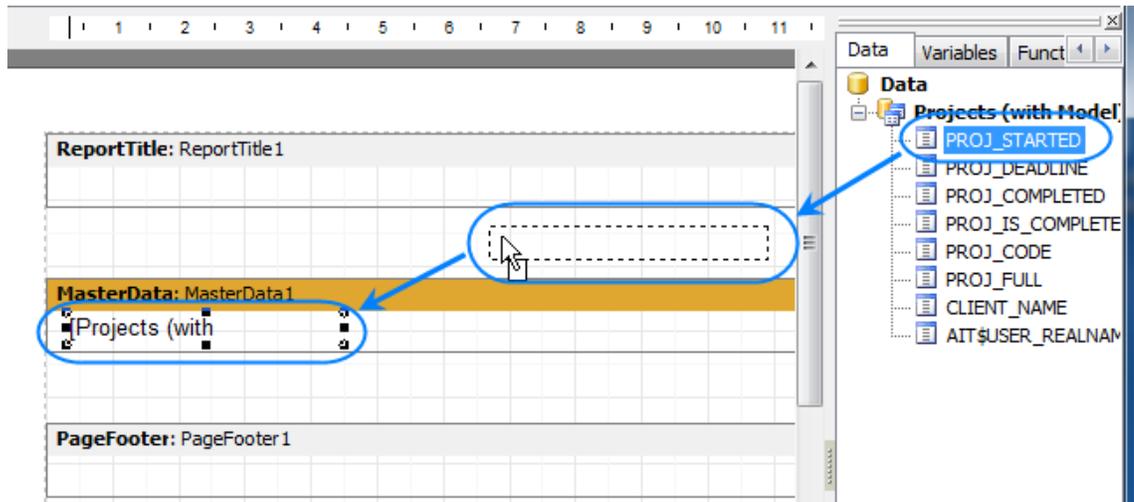


Your report page should look approximately like this:

ReportTitle: ReportTitle1				
Header: Header1				
MasterData: MasterData1				

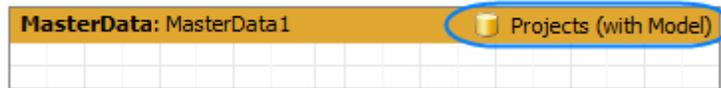
7. Adding data to **Master Data** band.

To add a variable data to your report, you will need to drag-and-drop the required fields from your query to the **Master Data** band.



Please note that any **Master Data** band can be linked to certain dataset (or query in this case) only, so in case you have more than one query, please be sure to drag and drop fields only to that **Master Data** band which has been linked to this query.

For example, the **Master Data** band below can contain fields from Projects (with Model) query,



Drag sequentially the following fields from the **Data** area and place them inside **Master Data** band in a row:

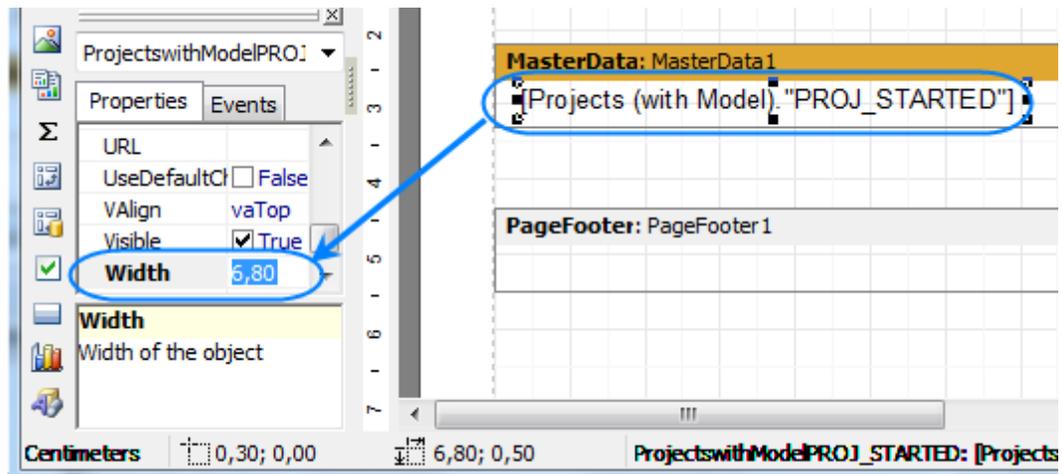
PROJ_FULL, CLIENT_NAME, PROJ_DEADLINE

When placed into your report, the fields take form of text objects, like:

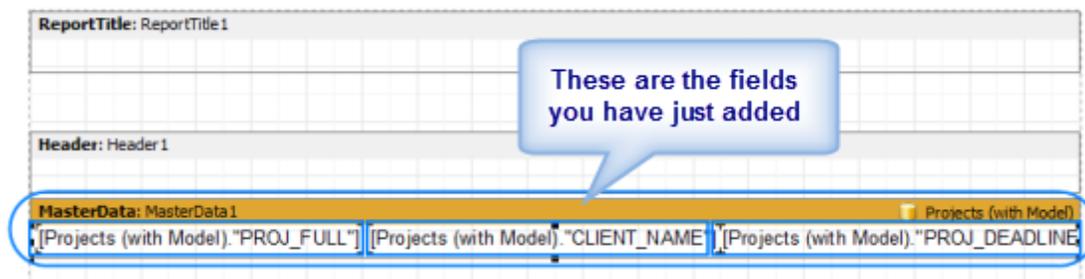
[Projects (with Model)."PROJ_FULL"]

These act very much like text variables in TO3000, Version 10 RTF templates.

Note: Some of these objects may be very wide. Please try adjusting their width by dragging the borders of these objects. Alternatively, please try entering exact object length by selecting it and typing their width in **Properties** area:

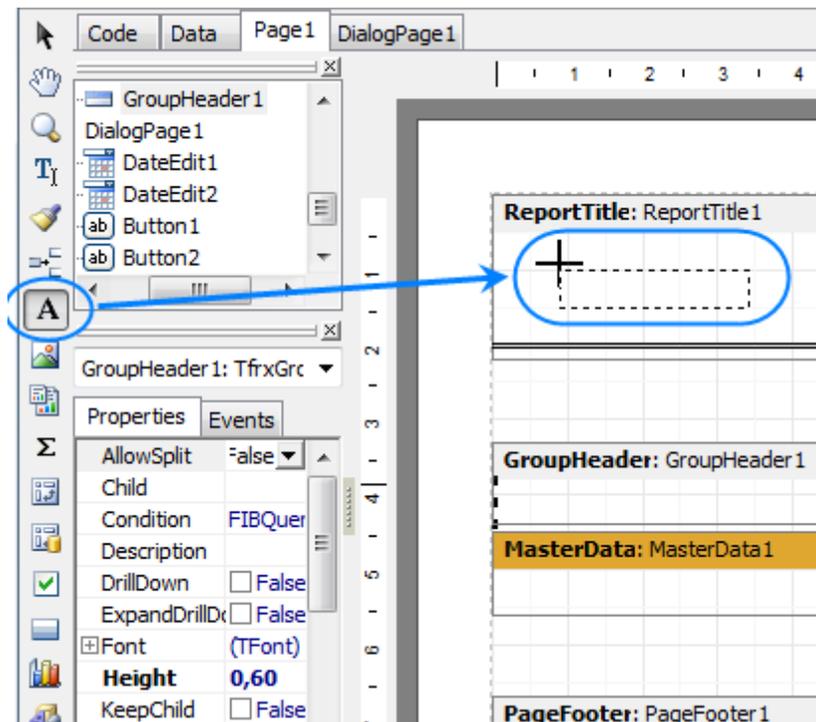


Once all the data has been added, your report should look like this:



8. Adding stationary data to other bands.

8.1. Add a header for your report by clicking **Text object** button and placing the object on your report, within the **Report Title** band.



8.2. Type the header for your report in the memo window which appears.



8.3. Data will be displayed in your **Master Data** band in columns (each indicated by a field from the query). Add the names of these columns right above the query field objects in your **Header** band: *Project name*, *Client*, and *Deadline* the same way you added the header text object.

After this your report should look as follows:

ReportTitle: ReportTitle1			
Projects Report			
Header: Header1			
Project Name	Client	Deadline	
MasterData: MasterData1			
[Projects (with	[Projects (with Model). "CLIENT_NAME"]	[Projects (with Model). "PROJ_DEADLINE"]	Projects (with Model)

9. Preview your report by clicking **Preview** button. Your report preview will be displayed in the

Preview window.

 **Note:** You can further configure style of your report by configuring the style of text objects. Select required text object and adjust its format in the **Properties** area to the left.

10. Save your newly created report by clicking **Save** button and close report designer.

New report is now ready to be used.

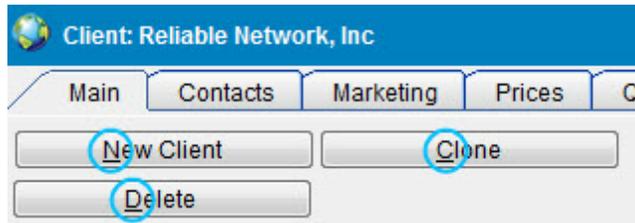
If you want to save this report in a separate file in the **Report** folder of TO3000, Version 10 (so that you can send it to other TO3000, Version 10 users), select the report in the list and click **Save** button.

See also:

Custom queries

25 Hot keys

To use *hot keys* in TO3000, Version 10, press Alt and a character an underlined character of an appropriate button on TO3000, Version 10 window



To open **Local Custom Filter**, press Ctrl+F

26 Other Products by AIT

26.1 AcroLexic

Dictionary of Acronyms and Abbreviations

AcroLexic 2.0 is a capacious dictionary of acronyms and abbreviations. With AcroLexic you can forget about tedious searching through countless pages of dictionaries each time you come across an unknown abbreviation. Currently it contains more than 70,000 terms with more than 150,000 definitions! The dictionary enables quick look ups of acronym definitions from different areas of knowledge and provides results in a convenient format. AcroLexic will be a valuable addition to your electronic bookshelf.

Web-site:

<http://www.acrolexic.com>

Download free trial:

<http://download.acrolexic.com/AcroLexic2Setup.exe>

26.2 AnyCount

Word Count, Character Count, and Line Count Software

AnyCount is an essential timesaving product for any translation business. It produces quick and exact automatic counts both in words and in other volume units (characters with spaces, characters without spaces, lines, pages, custom units) for all common file formats. AnyCount counts words — you count money!

Web-site:

<http://www.anycount.com>

Download free trial:

<http://download.anycount.com/AnyCount7Setup.exe>

26.3 AnyLexic

Terminology Management Software

AnyLexic — Terminology Management Software. It's a long-awaited software which could take any glossary and make it easy-to-use. With the terminology stored in one database terminology management becomes simple: you can easily create, edit and exchange terminological dictionaries in a reliable and convenient way. The software is not tied to any particular terminology. AnyLexic will help you to gain high quality and consistency in translation.

Web-site:

<http://www.anylexic.com>

Download free trial:

<http://download.anylexic.com/AnyLexic2Setup.exe>

26.4 AnyLexic Server

Server for Terminology Management Software

AnyLexic Server is a server software that enables a harmonious teamwork with terminology among AnyLexic users. You needn't ping-pong dictionaries anymore. Different users with granted rights may have access to a common term database either via local area network or via Internet. With data back-up security, integrity check and repair AnyLexic Server helps to gain ultimate terminology among translators working under one project.

Web-site:

<http://www.anylexic.com>

Download free trial:

<http://download.anylexic.com/AnyLexic2ServerSetup.exe>

26.5 AnyMem

User-Friendly Translation Memory Software

AnyMem is a user-friendly translation memory software. AnyMem is compact, stable, easy to learn and to use. AnyMem CAT engine fully supports Unicode and can work with any language pair without the need of external components, like .NET Framework or Java Virtual Machine, commonly required by other translation memory software.

Web-site:

<http://www.anymem.com>

Download free trial:

<http://download.anymem.com/AnyMem2Setup.exe>

26.6 CATCount

Computer Assisted Translation Tool for Easy Word Count

CATCount is useful software tool for translation industry professionals. It greatly eases task of accounting of Computer Assisted Translation jobs. CATCount does this by translating complex CAT Scheme into one easy number, i.e. CATCount. Additionally, it provides great features for printing and export of used CAT Scheme together with original word counts, and resulting CATCount. Word count analysis logs of Trados Translator's Workbench are processed automatically.

Web-site:

<http://www.catcount.com>

Download:

<http://download.catcount.com/CATCountSetup.exe>

26.7 ClipCount

Clipboard Wordcount Software

ClipCount is ideal for fast text count in any file or program. Just select text you want to count and press CTRL+C keys (or any other combination you select) and window with count results appears in the bottom right corner of the screen. ClipCount can count word, characters with spaces, characters without spaces and custom count units.

Web-site:

<http://www.clipcount.com>

Download free trial:

<http://download.clipcount.com/ClipCount2Setup.exe>

26.8 ExactSpent

Easy and Exact Time Tracking Software

ExactSpent is an efficient time management software that enables you to calculate exact time you spent on particular job. You can track multiple jobs for multiple clients in a single place. The software will help you get organized, increase your productivity, and make better use of your time. ExactSpent allows you to see clear picture of all your tasks and time expenses. Let you rule time, not time rules you.

Web-site:

<http://www.exactspent.com>

Download free trial:

<http://download.exactspent.com/ExactSpent2006Setup.exe>

26.9 Projetex

Project Management Software for Translation Agencies

Projetex is a Project Management software for translation agencies. It is a flagship product by AIT being used by 200+ translation agencies around the world. Our customers have already appreciated how Projetex simplifies task of corporate and freelance workflow management, data and files sharing within a translation agency.

Web-site:

<http://www.projetex.com>

Download free trial:

<http://download.projetex.com/Projetex9Setup.exe>

26.10 WinLexic

GUI to Microsoft® Glossaries for Technical Translators and Technical Translation Agencies

WinLexic — GUI to Microsoft Glossaries for Technical Translators and Technical Translation Agencies. Displays glossaries in a nice and convenient dictionary form. Allows fast search for glossary terms. It simplifies the work with multilingual terminology used in Microsoft software products.

Web-site:

<http://www.winlexic.com>

Download free trial:

<http://download.winlexic.com/WinLexic2005Setup.exe>