



Translation Office 3000 3D Folder Automation Guide

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1 Folder structure

Business Folder

TO3000 3D 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*.

The Business folder is created, by default, in the root of drive C.

To specify a different business folder location:

1. Click Advanced Settings in the Backstage view;
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.

Prospect folders (a separate folder for each prospect) are stored in the Prospects folder. Each folder is named with the prospect's Code. Please refer to the Prospect 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 3D** 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 3D 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 Folders Tab.

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.
- [Credit notes](#) – contains all printable Credit notes for current client.
- [Payments](#) – in this folder all payment printouts of the current client are saved.
In Without Projects Mode
- [Refunds](#) – contains all printable refunds for current client.
- [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.

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. The name of the project folder can include other info as well.

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.

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.

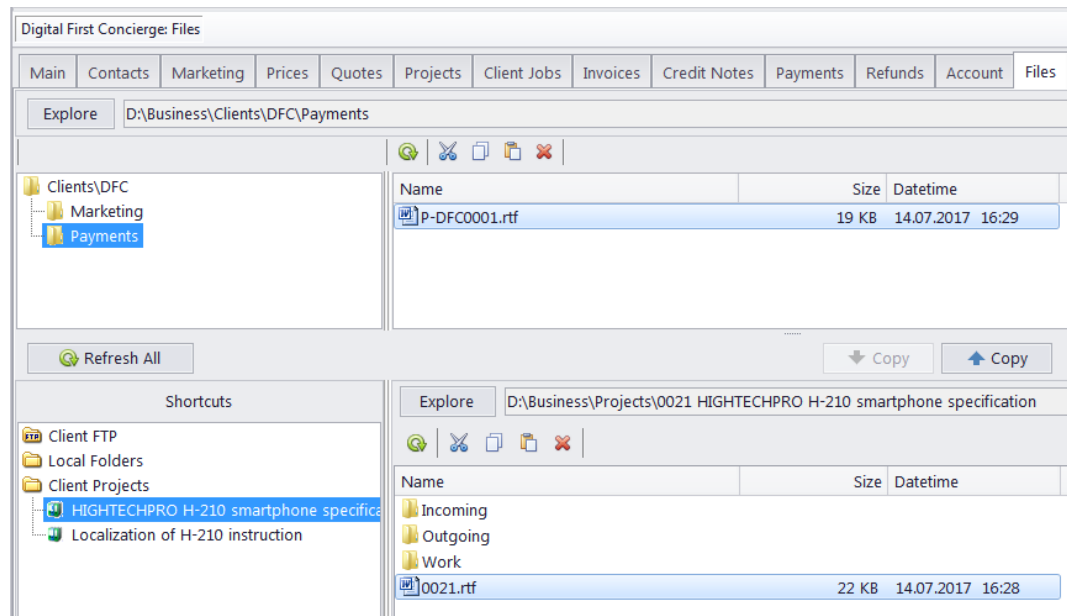
All *client jobs* are stored in clients' folders.

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

5 File manager

Folders of certain Clients and Projects

Files of any particular client or project can be viewed with the help of the Files tab, available in each Main tab in TO3000 3D. The file manager interface in this case has more options, like shortcuts/related folders and FTP access.



The upper field displays the tree structure of the folder being viewed on the left and the files inside the selected folder to the right.

The **Explore** button: click this button to open the currently viewed folder in Windows Explorer. The field to the right of the button displays the path to the selected folder.

The **Common file options** buttons above the files list can be used to perform standard operations with selected files and folders. Left to right, these are **Refresh, Cut, Copy, Paste, Delete**.

Shortcuts and Related Folders

Shortcuts and 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*.

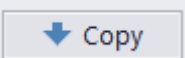
The **shortcuts** list can also be used to open any folder on the local machine, via the Local Folders shortcut.

Any folder selected in the Shortcuts list will have it's contents displayed to the right.

Files can be quickly exchanged between the currently open folder and it's shortcut using two special buttons:



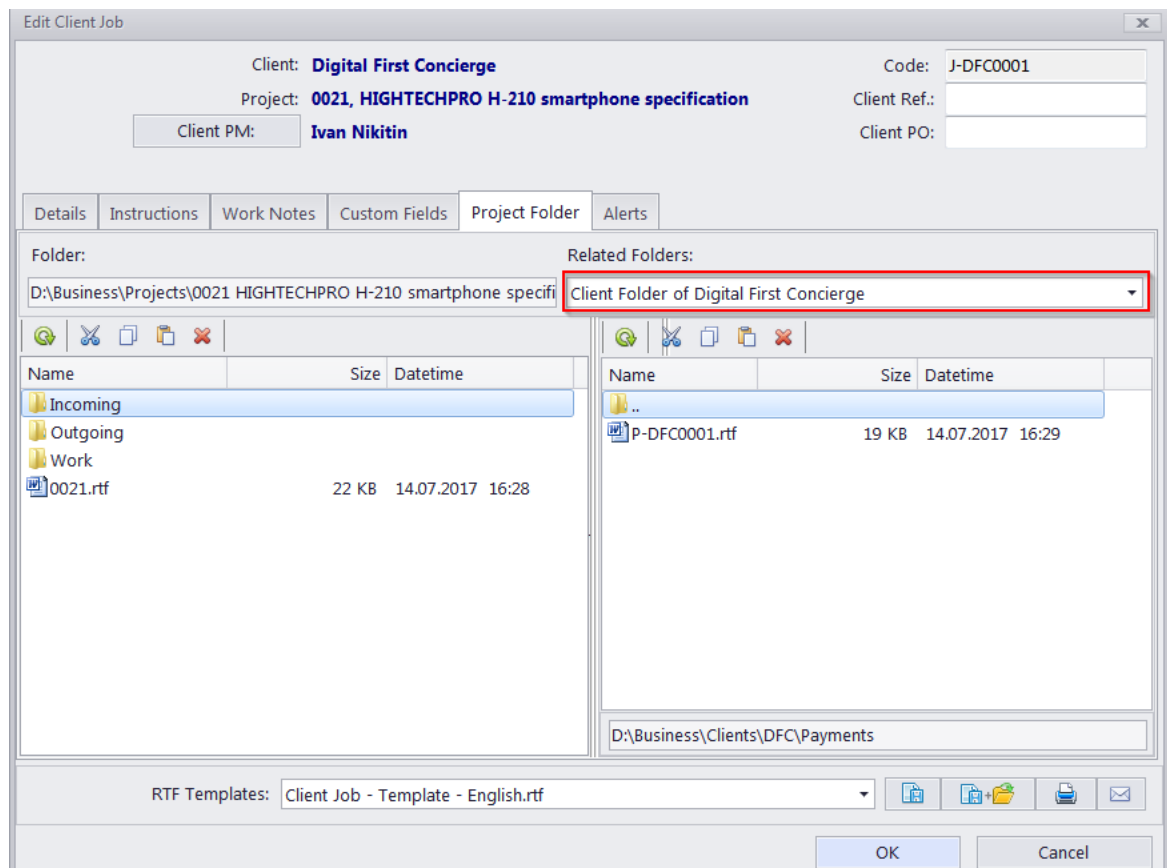
- copies the file "up" from the shortcut location to the selected sub-folder.



- copies the file "down" from the selected sub-folder to the shortcut location.

NOTE: If you change the client code (it can be done from the Main tab of the Client window), TO3000 3D will attempt to rename the appropriate folder.

Related Folders can also be accessed via the Related Folders drop-down list in the Project Folder tab of the Edit Job window.



Any option selected in the drop-down list will appear in a new field to the right.


6 Built-in FTP client

TO3000 3D 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 the **Shortcuts** 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 3D 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 3D 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.