

# **Translation Office 3000, Version 3D + Help** © Advanced International Translations

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# 1. Welcome to Translation Office 3000 3D



# Translation Office 3000 3D

**TO3000 3D+** is an advanced piece of software, which can be easily and seamlessly integrated into 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 3D** in a consecutive way, or invoke context–sensitive topics of the **Help System** from any location in **TO3000 3D+** by pressing the **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/

# 1.1. What's new in TO3000, 3D

TO3000 3D+ is our major release of a "portable headquarters" program for freelance translators.

Currently, the main new features in relation to TO3000 3D are an updated Database engine and improved compatibility with Windows 11.

# 1.2. System requirements

Hardware & Software	TO3000 3D+ Requirements
Operating System	Windows 7 Windows 8 Windows 8.1 Windows 10 Windows Server 2008, Windows Server 2012
CPU	1200Mhz or higher
Memory	2Gb or more
Hard Disk Space	300Mb for the initial setup plus variable space for the database*
Monitor	Any VGA/SVGA monitor with support for a minimum of 640x480 resolution and 256 colors

Note: It is important to have enough space for database (at least 300–400Mb at any given moment) so that it grows naturally without any problems and errors due to insufficient hard drive space.

# 1.3. TO3000 3D+ Setup

To install TO3000 3D+:

**1. Download** the *TO3000 3D*+ setup file using the following link:

http://download.to3000.com/SetupTO3000v3D.exe

2. Run SetupTO3000v3D.exe and proceed with the Setup Wizard steps.

2.1. During the setup procedure, TO3000 3D+ Setup will prompt you to select components to install.

- **Demo database**. Select this option if you are installing TO3000 3D+ for evaluation. This database contains some records, imitating the workflow data of a freelance expert.
- Empty database. Select this option to install a clean database before you begin entering your actual workflow data into TO3000 3D+. If you already have a database installed, please move away or delete this database, before running TO3000 3D+ Setup.
- **Do not install database**. If you are just updating your TO3000 3D+, and already have your database up and running and there is no need to install another one.

**NOTE:** As a security measure, TO3000 3D+ Setup will not overwrite an existing database under any circumstances. If you would like to install a new database, please remove or delete the existing database file manually before running TO3000 3D+ Setup.

The TO3000 3D+ database file is located in the following folder:

C:\Users\Public\Documents\AIT\TO3000, Version 3D\db\TO30003D.mdf

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

# 1.4. Upgrade to TO3000 3D+

#### 1.4.1. Installing and registering TO3000 3D+

TO3000 3D+ can be installed and run along with earlier versions of TO3000 for evaluation purposes.

To upgrade from earlier versions to TO3000, you will need to do the following:

1. Install new TO3000 3D+ 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. Register TO3000 3D+.

#### 1.4.2. Converting from earlier versions of TO3000

Depending on the version of TO3000 you used before, you will have to do different things to transfer the data from your old database into TO3000 3D+

#### TO3000 3D

The only thing you need to do in this case if create a backup file and restore it.

- 1. Launch your old TO3000 3D
- 2. Go to **Database Settings** and click **Backup** to create a BAK file (see <u>Backup</u>).
- 3. Launch TO3000 3D+
- 4. Go to **Database Settings**, click **Restore** and select the created BAK file to restore the database (see <u>Restore</u>).

It is also possible to transfer Projetex database into TO3000 this way. You can create BAK files for Projetex on the "Database" tab of the Server Administrator utility on the Projetex server machine.

#### TO3000 11 and 10

The TO3000 3D+ Database Converter is an application supplied in the standard TO3000 3D+ setup file. It allows to continue the use of a database from TO3000 10 or 11. Running the TO3000 3D+ Database Converter is a convenient way to upgrade a database from TO3000 11 to operate with TO3000 3D+.

1. Run the utility from either the startup menu or by double-clicking the TO3000\_3DConverter.exe file (the default location is ...\AIT\Translation Office 3000 Version 3D\Admin\DBConverter).

2. The TO3000 3D+ Database Converter will start with a list of requirements for it's successful operation. Make sure that the database of your previous installation of TO3000 10 or 11 is present on the computer and that the MS SQL server is set up and configured. Then click the **Next** button.

🏠 TO3000 3D+ Database Conver	ter   Version 16.0.0.2	
	Welcome Welcome to database converter	
Welcome Select Source DB File Select MS SQL Server Ready to process Data Transfer Finish	This tool is used to convert TO3000 database from version 10/11 to version 3D+. (Projetex database version 10 also may be converted) Requirements: 1. The TO3000 10/11 database file (default location: C:\Users\Public\Documents\AIT\TO3000, Version 17\TO3000.FDB) or the Projetex 10 database file (default location: C:\Program Files (x86)\AIT\Projetex 10\Projetex Server\Database\Projetex.FDB) 2. Installed and configured the database server MS SQL Server EXPRESS LocalDB	
www.to3000.com	<u>B</u> ack <u>N</u> ext <u>C</u> an	cel

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3. Navigate to the directory where your TO3000 10 or 11 database is installed. The database file should appear in the lower field. Select it and click **Next.** 



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4. Click the name of the MS SQL server that is available on your computer and click Next.

TO3000 3D+ Database Conver	ter   Version 16.0.0.2	×
	Select MS SQL Server LocaIDB TO3000 3D+ database will be created on this server.	
	Available SQL Servers	
Welcome Select Source DB File	(LocalDb)\MSSQLLocalDB (MSI)	
Select MS SQL Server		
Ready to process		
Data Transfer		
Finish		
www.to3000.com	<u>B</u> ack <u>N</u> ext <u>C</u> ancel	

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5. The utility will connect to the server. If you installed TO3000 3D+ with the demo or empty database, the utility will ask you to confirm that you wish to overwrite the existing database. Make a backup copy of it if you do not wish to lose it. When you are ready to proceed, check the box "Overwrite existing TO3000 3D+ database." and click Start.

TO3000 3D+ Database Conver	ter   Version 16.0.0.2	
	Ready to process Everything is ready to start transferring data	
Welcome Select Source DB File	Source database file: C:\Users\Public\Documents\AIT\TO3000, Version 10\DB\TO3000.fdb Target SQL Server: (LocalDb)\MSSQLLocalDB Connect to SQL Server LocalDB: Ok Warning! Database "TO30003D+" found on this server. Database folder: C:\Users\Public\Documents\AIT\TO3000, Version 3D+\db\	>
Ready to process Data Transfer		
Finish	Overwrite existing TO30003D+ database. Existing data will be lost.	
	Press Start button to begin Data Transfer proccess	
www.to3000.com	<u>B</u> ack <u>Start</u> <u>C</u> ance	el 🛛

6. The Data transfer will proceed automatically. Then it is finished, click **Finish** to close the utility.

#### TO3000 9 or older

IF you are using a version of TO3000 older than 10, you can use the TO3000, Version 11 Database Converter first. It is an application supplied in the standard TO3000 3D+ setup. It allows to transfer a database from Translation Office 3000 (Versions 7, 8, 9 and 10) into a form compatible with the TO 3000 3D Database Converter.

1. Run the converter from either the startup menu or by double-clicking the DBConverter.exe file (the default location is ...\AIT\Translation Office 3000 Version 3D\Admin\DBConverter10\).

2. Select your current version of the TO3000 database and click Next button.

3. Select the Create TO3000 11 Database radio button.

4. TO3000 11 Database Converter will automatically locate the installation of TO3000 and select the source database file to be transferred. If the program cannot find TO3000 database, click the **Browse** button, manually specify a path to the source database file and click the **Next** button.

5. Specify a directory in which the new database file should be generated and click the **Next** button.

6. Click the **Start** button to convert the database for TO3000 11.

7. Run the TO3000 3D+ Database Converter to convert the newly created database into one compatible with TO3000 3D+.

**IMPORTANT NOTE:** Make sure that you convert the 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 Projetex or TO3000, it is required to have French as the *Language for non-Unicode programs* in the *Region and Language* options of the computer, in which you perform the conversion of the TO3000 3D+ database.

#### How to change System Locale:

- You must be logged in with an account that has administrative privileges in order to change the system locale.
- The appropriate language packs should be installed on the operating system.

View the System Locale settings for Windows

- 1. Click Start then Control Panel
- 2. Click Clock, Language and Region
- Windows 10, Windows 8: Click Region Windows 7: Click Region and Language Windows XP: Click Regional and Language Options The Region and Language options dialog appears.
- Click the Administrative tab On Windows XP, click the Advanced tab If there is no Advanced tab, then you are not logged in with administrative privileges.
- 5. Under the **Language for non-Unicode** programs section, click **Change system locale** and select the desired language.
- 6. Click OK
- 7. Restart the computer to apply the change.

**NOTE:** If you are installing TO3000 3D on a new PC, ensure that the *Business* folder used by the previous version of 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 the TO3000 3D+ setup folder. Listed below locations of *templates, CAT schemes* and *Local Custom Filter settings* in TO3000 V8, TO3000 V9.0, TO3000 V10, TO3000, Version 11 and in TO3000 3D:

#### Templates

- •TO3000 V8: ...\Translation Office 3000 V8\Templates\
- •TO3000 V9.0: ...\Translation Office 3000 Version 9.0\Templates\
- •TO3000 V10: C:\Users\Public\Documents\AIT\TO3000, Version 10\Templates\
- •TO3000, Version 11: C:\Users\Public\Documents\AIT\TO3000, Version 11\Templates\
- •TO3000 3D: C:\Users\Public\Documents\AIT\TO3000, Version 3D\Templates\
- •TO3000 3D+: C:\Users\Public\Documents\AIT\TO3000, Version 3D+\Templates\

#### CAT schemes

- •TO3000 V8: ...\Translation Office 3000 V8\System\Schemes\
- •TO3000 V9.0: ...\Translation Office 3000 Version 9.0\Schemes\
- •TO3000 V10: C:\Users\Public\Documents\AIT\TO3000 3D+\Schemes
- •TO3000, Version 11: C:\Users\Public\Documents\AIT\TO3000, Version 11\Schemes
- •TO3000 3D: C:\Users\Public\Documents\AIT\TO3000, Version 3D\CatCount 4\Schemes
- •TO3000 3D+: C:\Users\Public\Documents\AIT\TO3000, Version 3D+\CatCount 4\Schemes

#### Local Custom Filter settings

- •TO3000 V8: ...\Translation Office 3000 V8\Filters\
- •TO3000 V9.0: ...\Translation Office 3000 Version 9.0\Filters\
- •TO3000 V10: C:\Users\Public\Documents\AIT\TO3000, Version 10\Filters\
- •TO3000, Version 11: ...C:\Users\Public\Documents\AIT\TO3000, Version 11\Filters\

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

## 1.5. Quick start

The following guidelines describe the most basic working procedures in TO3000 3D+, such as:

Setting currencies and services

Creating Client database

Creating Quotes and Projects

Creating jobs

**1. Setting currencies and services.** A newly installed TO3000 3D+ will not have all the **currencies** you need. However, all required currencies can be quickly added to the database. Also, you many need to adjust your **base currency**. Having installed TO3000 3D+, please take a moment to set the system up for your business.

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

To enter new currencies:

•Run TO3000 3D+, enter the Backstage view and select Business Settings.

•Click Currencies to open the currencies section of the Business Settings menu.

•Click the New button to create a new currency record.

•Enter the new currency's **Descriptive Name** and a 3-letter abbreviation in the **New Currency** window.

To change your base currency:

•Select Backstage > Advanced Settings.

•Click General.

•Click the Base Currency button and select your base currency.

**Services** in TO3000 3D+ can vary from "*translation from source to target language*" to more unusual ones like "*training*" or "*consulting*". You can enter services of any type into the TO3000 3D+ Business Settings.

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

#### •Select Backstage > Business Settings.

•Click Groups of Services and add a group for a new service (optional).

•Click the <u>Services</u> section and enter a new service by clicking **New** button.

**2. Creating a Client database.** There are two ways to fill your database with **Clients**: entering all the Clients manually or importing them from previous versions of TO3000. If you own a previous version of Translation Office 3000 — you can quickly import your **Clients** (along with all other data) by using the TO3000 3D+ Database Converter.

To enter a new Client manually:

•Open the Clients section of the Ribbon and click Client.

•Click Main and then New Client and enter the required details.

Please refer to the <u>Upgrade to TO3000 3D+</u> topic for details on importing data from previous versions of TO3000.

**3. Creating Quotes and Projects. Quotes** and **Projects** can be created using the <u>Quotes tab</u> and <u>Main tab</u> of the Project window respectively. A Project can also be created using data from a quote.

To create a Quote:

•Open the Clients section of the Ribbon and click the Client icon.

•Click the **Quotes** tab.

•Click the New Quote button, to begin creating a new Quote

To create a Project (for With Projects Mode):

•Open Projects section of the Ribbon and click the Project icon.

•Click the Main tab.

•Click the New Project button, to begin creating a new Project.

**4. Creating jobs.** In TO3000 3D+, any Project consists of a number of jobs. A job represents a certain amount (characters, words, hours, custom units) of a certain service (like translation from source to target language), assigned on a certain date and having a deadline.

The quickest way to create *Jobs* is to do so in the **Client jobs** tab of the **Project** window. For more information about jobs, please refer to <u>Project window Client jobs tab</u> topic.

To create Client Jobs (for With Projects Mode):

•Open the Projects section of the Ribbon and click the Project icon.

•Click the Main tab and select a Project.

•Click the **Client jobs** tab and click the **New** button to create a *client job*.

To create Client Jobs (for Without Projects Mode):

•Open the Clients section of the Ribbon and click the Client icon.

•Click the Main tab and select a Client..

•Click the Client Jobs tab and click the New button to create a *client job*.

#### 5. Issuing Invoices

TO3000 3D+ 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 a Client:

•Open the **Clients** section of the Ribbon and click the **Client** icon.

•Click the Main tab and select a Client.

•Click the Invoices tab.

•Click the **New** button to begin creating an Invoice for this client. See <u>Creating invoices to clients</u>

•Add required **Client Jobs**, select markups and discounts, and click the **Apply** button.

#### To create a Payment from Client:

•Open the Clients section of the Ribbon and click the Client icon.

•Click the Main tab and select a Client.

•Click the Payments tab.

•Click the New button to begin creating a payment from this client.

## 1.6. Registration

#### 1.6.1. Trial period

You are welcome to use TO3000 3D+ free of charge during the 30-day evaluation period.

During the evaluation period TO3000 3D+ is fully functional, but the number of Clients and Projects is limited to 50.

#### **1.6.2.** Purchase information

After purchasing TO3000 3D+, you will receive an encrypted *License Key* for your TO3000 3D+ by e-mail.

**NOTE:** Registration implies entering the License Keys into TO3000 3D+, thus switching off the evaluation mode and removing evaluation period limitations.

#### 1.6.3. Registering TO3000 3D+

To register your copy of TO3000 3D+:

1. Run TO3000 3D+.

2. In the **Backstage** view, click **Help > Register**.

3. Paste your TO3000 3D+ Serial Number, which you will receive by email into the **Register TO3000 3D+** dialog box, and click **Unlock**.

# 1.7. Workflow Modes

TO 3000 can support two Workflow Modes mirroring the two most widespread workflow management methods for Freelance Translators:

•With Projects Mode. This workflow mode allows to group jobs in a project.

•<u>Without Projects Mode</u>. This workflow mode allows to work with jobs directly, without creating projects.

**NOTE:** Workflow Modes can be changed in the **Backstage** > **Advanced Settings** > **Workflow Modes dialog**.

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

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

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

#### 1.7.1. With Projects Mode

To choose With Projects Mode, enter the Backstage view and then click Advanced Settings > Workflow Mode. In the opened window choose With Projects Mode and click OK.

This mode has the following workflow:

1.Create a *client*. For this go to **Clients > Client** and click the **New Client** button.

2.Create a *project* for this *client*. For this go to the **Projects tab** of the client and click the **New** button.

3.Create *client jobs* assigned to the *project*. For this right-click the project and click **Open Project**, then switch to **Client Jobs tab** and click **New** button.

Pros	pects Clients	Projects	
	iii 🗑	J 🗸	
Client Prices	Quotes Client Jol	bs Invoices Credit N	otes Payments Refunds
Unlimited Concepts	Unified: Projects 🝷		
Main Contacts	Marketing Prices	s Quotes Projects	Client Jobs Invoices C
New	<u>E</u> dit <u>D</u> elet	te Status: *All*	
Enter text to sea	rch	•	Find Clear
* Project Code	Proj	ect Name	Assigned
• 0044	UCU web-site lo	Open Client	06.01.2017 14:18
0045	Booklet about U	Open Project	11.12.2014 9:00
		Grid Settings	
		Export	
		Print	

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 tasks for one job. For example, if you make a 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 *groups of services*.

•Translate into several languages. For example if you make a 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 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.

#### 1.7.2. Without Projects Mode

To choose **Without Projects Mode**, enter the **Backstage** view and then click **Advanced Settings > Workflow Mode**. In the opened window choose **Without Projects Mode** and **OK**.

This mode has the following workflow:

1.Create a *client*. For this go to **Clients** > **Client** and click the **New Client** button.

2.Create a *client job* for this *client*. For this go to the **Client Jobs tab** of the client and click the **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 not be useful for freelance translators who:

•Group several jobs in a project.

•Perform several tasks for one job. For example, if you make a 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 *groups of services*.

•Translate into several languages. For example if you make a 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 English => German and English => Spanish are *services*.

#### 1.7.3. Common workflow

After jobs are created (see topics above) the workflow is commonly as follows:

1.After *jobs* had been completed, you can mark them as *completed* by editing the job's timeline (**Clients > Client > Client Jobs** tab > **Edit** button). Then go to the **Clients > Client > Invoices** tab and create a new invoice by clicking the New button. Add all necessary jobs to this invoice, select taxes, discounts and click the OK button.

2.After a payment for this invoice has been received, go to the **Clients > Client > Payments** tab, click the **New** button, type the value of this payment, switch to the **Linked with Invoices** tab, click the **New Link** button and connect this payment with appropriate invoices. Click the OK button. Alternatively, you can click the **Mark as Paid** button in the **Edit Invoice** window to create and link 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 the **Projects** > **Project** > **Main** or **Clients** > **Client** > **Projects** tab.

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

Edit Client Qu	iote							х
	Client: Unlimited Concepts Unified Date Sent: 28							
	Client PM:	- None -				Code:	Q-UNLICON0001	
						Status:	Accepted	•
	Draft Project:	Multilingual Ir	ventory of Cul	tural Heritage in	Europe		Unknown Received	
Client Jobs	Request for Quote	nswer Custo	m Fields				Corrected Accepted	_
<u>N</u> ew	Edit	<u>D</u> elete					Rejected	
* Name	Group of Service	Service	Unit	Volume	Price	Pricing	Total	
Inventory	translati Translation	English => Fre	words	29000	0,09	per unit	2610,00	

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

U	Unlimited Concepts Unified: Quotes 💌											
	Main	Contact	s Marketing	Prices	Quote	s P	rojec	ts Cli	ent Jobs	Invoice	es Cre	edit Notes
	<u>N</u> ew	Quote	<u>E</u> dit	<u>D</u> el	ete	$\equiv$	•	Status:	*All*			- C
								e				
	Enter	text to se	arch				Crea	te Projec	t Based on	Quote		
344		a da			l	-	-	clia			A	l an a d
- 24		ode	Ni			Cile	10		ASSI	gnea		
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	Q-UN		Nasa Astrophysi	ics Data S	ystem (/	4 Un	imite	d Conce	pts Unifie	d	22.10.2	016 9:00

# 2. User interface

		<b>⊎</b>	Bac	kstage b	outton				TO3000, Version 31	) - Evaluate Period				_ <b> </b>
		Prospe	ects C	Clients	Projects					🔍 Sea	arch	<b>•</b>	Off 💡 🕵	🛞 Windows 🝷
Clier	it F	Prices	Quotes	Client Jo	obs Invoice	S Credit N	Notes Paymer	nts Refund	ds Client Account:	Business Expense	Ribbo	n (one tab)		
Transla	ation D	esigns C	lients: Pric	ces 0045, E	Booklet about	Unlimited Co	oncepts Unified:	CI -						
	Tran	slation De Clients: P	rices			-+   0i	anta Clinate la		C #4 Mistor	Durante Defin	.d	n Info Colondar	_ <b>_</b> X	x
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	l F	n Mai	n Clien	nt Jobs	Files Info	Calendar								
3	•		New	Edi	it <u>c</u>	elete	Status: *All*			<ul> <li>Invoid</li> </ul>	ed: *All* 🗸			
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-		* (	Code	loL	b Name		Project		Assigned	Deadline	Completed	Group of Services	Service	Pricing
ŀ	A A H	→ J-U dh → J-U		UCU book UCU book UCU book	klet translatio klet DTP klet proofrea	n Booklet Booklet d Booklet	about Unlimite about Unlimite about Unlimite	d Concepts d Concepts d Concepts	11.12.2014 9:00 14.12.2014 9:00 11.12.2014 9:00	14.01.2015 18:00 06.01.2015 18:00 07.01.2015 18:00	- No - - No - 07.01.2015 18:00	Translation Editing Editing	English => Swedish DTP check Proofreading	per unit flat fee per unit
		Adva	anced	<filter is<br="">1 of</filter>	Empty> f 3	F 144 44 4	C I							
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Da	shb	oard	Wc	orkspa	ace Ca	lendar	Report	ts Kno	wledgebas	se the second	vaviyau011 Ddl			

# **The Navigation Bar**

The **Navigation bar** contains links to the five main sections of TO3000 3D+: the Dashboard, the Workspace, the Calendars, the Reports, and the Knowlegebase.

For more information, see the Navigation Bar topic.

# The Ribbon

The **Ribbon** consists of tabs of shortcuts (icons with text captions) within the currently open section. The exact tabs and shortcuts available are different for each section.

For more information, see the Ribbon topic.

# The Backstage view

The Backstage view gives access to all of the program's settings and the registration/update/upgrade interface.

See the **Backstage** topic for details.

# 2.1. Basic interface options

The majority of data in TO3000 3D+ is being stored in various tables. Each of these tables can be customized to a certain extent to adopt to each user's preferences.

Described below are four main aspects of table customization.

#### 2.1.1. Columns Customization

You can easily choose columns to be displayed in a table. To choose displayed columns:

1. Click the Asterisk symbol in the top-left corner of a table to display a list of columns, available for that table.

2. Choose columns which should be displayed by selecting the appropriate check boxes.



#### 2.1.2. Moving columns

You can easily change the order of the columns displayed. To change column order:

- 1. Click the column caption and hold the mouse button.
- 2. Drag your cursor without releasing the mouse button, to the desired column.

3. Release the mouse button. The column will be moved to the place indicated by the green arrows.

Job Name	Assigned	Deadline	Completed 📍
UCU web-site locaComple	ted.01.2017 09:00	09.02.2017 18:00	- No -
UCU web-site DTP	10.01.2017 09:00	06.02.2017 18:00	- No - I

**Note:** Optionally you can click and drag entries in the **Customize Columns** window described above to change the order of the columns.

Assigned
7 09:00
al 7 09:00
al (EUR)
/ 03.00
Global Code 🕴 09:00
Code 1 09:00
Status
4 09:00

To open the **Customize Columns** window, click the Asterisk symbol \* in the top-left corner of a table.

#### 2.1.3. Sorting records

The majority of data in TO3000 is stored in various tables. Each of these tables can be customized to a certain extent, in order to adapt to each user's preferences.

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

- If you want to sort your table by a certain column, left-click the caption of the column.
- The sorting order (ascending or descending) is shown as a triangle arrow near the column title.
- If you click the same column caption one more time, the order of sorting will be reversed.

Code 🔹 🖣	Global Code	Sent
I-INTSEC0002	ACME-I0018/201	11.05.2016
I-INTSEC0001	ACME-I0017/201	24.07.2016
I-INTI0002	ACME-I0030/201	06.10.2016

#### 2.1.4. Grouping Records

In addition to traditional sorting, records in TO3000 tables can also be grouped.

This is especially useful if you want to look at records that have specific values in specific fields.

To group a table by a certain column, drag that column's header into the Group Box.

	Enter text t	o search		▼ Find	Clear	]		
Group of Services Group by that column								
*	Code	Job Name	Assigned	Deadlin	e	Completed	Group of Services	Ŷ
۲	J-UNLICO1	UCU web-site localizatior	18.01.2017 09:00	09.02.2017	18:00	- No -	Translation	

The table will be displayed as a list of Groups (values of the column). You can click a Group to expand or collapse it.

	Group of Services 🔻											
*		Code	Job Name									
۲	۲	Group of Services : Translation										
	Ŧ	Group of S	Group of Services : Testing									
		J-ILLDESOC	User hints translation	v								
		J-WIREAD(	Winlexic localization testi	W								
		J-WIREAD(	Winlexic localization testi	W								

You can drag multiple headers into the Group Box to create a hierarchy of groups.

Gro	oup	of Services	Service      Complete	d ▼				
*		Code	Job Name					
• -	Gr	roup of Services : Translation						
	Þ	Service : English = > Finnish						
	-	Service : English = Spanish						
		<ul> <li>Completed : 14.12.2016 18:00</li> </ul>						
		J-NETCO	DN Analog deviation part 3	Analo				

When you drag a header out of the Group Box, it will snap back into its previous position in the table.

# 2.2. Multi-window interface

Every time you click an icon on the Ribbon to open a table, report, calendar, dashboard, or knowledgebase, it opens in a new window inside the program.

Prospects	Clients Projects			٩,	Search	-	Off 💡	
ject Client Jobs								
net Security Technolog	gies: Prospect Jobs Unlim	ited Concepts Unified: Client Jobs 00	45, Booklet about Unlin	nited Concepts Unified:	CI 🕶			
							_ 🗆 X	
Unlimited Concept							_ □	х
💦 🏠 0045, Booklet	about Unlimited Concept	s Unified: Client Jobs					_	
Main Client	Jobs Files Info /	Calendar						
New	<u>E</u> dit <u>D</u> el	ete Status: *All*		- Invoice	d: *All* •			
4	search	✓ Find	Clear					
* Enter text to	Scureniii							
* Enter text to	Job Name	Project	Assigned	Deadline	Completed	Group of Services	Service	P

These windows can be manipulated just like the window of the program itself: moved, resized, maximized, minimized and closed.

The control buttons for a maximized window are found directly under the control buttons for the program itself.

Evalua	ate Period			_	B		x
	🔾 Search	•	Off 💡 🕵 🕏	Windows 🔻	_	8	×

Minimized windows are lined up right above the Navigation Bar and can be moved around as well.



#### 2.2.1. Jump tabs

Every open window creates a new Jump tab just below the Ribbon.

Cyber Computation Technologies, Inc	Clier	nts: Invoices 💌 0036, Trainir	ng Schedule
Mass Invoicing <u>E</u> di	×	Close	
	×	Close All	
Enter text to search		Close all except this	Find Clear

Clicking a jump tab will immediately bring the corresponding window to the front. Clicking the arrow on the right side of a tab will bring down a menu that will allow you to close either that particular window, all windows in the current section, or all windows except the current one.



#### 2.2.2. Quick Window Modes

The "**Windows**" drop down menu near the top right corner of the main window offers a number of quick options for the layout of currently open windows:

- **Cascade** line up the windows behind each other os that the header and left edge of each is visible.
- **Tile Vertically** move and re-size the windows so that all are fully visible, with priority given to lining them up side-by-side.
- **Tile Horizontally** similar to Tile Vertically, but gives priority to stacking windows on top of each other.
- Minimize All / Maximize All minimize/maximize all currently open windows.
- Close all Windows immediately closes all windows.

## 2.3. Navigation Bar

The Navigation Bar is located near the bottom of the TO3000 window. It allows the user to switch between the five main sections of TO3000: the **Dashboard**, **Workspace**, **Calendar**, **Reports** and **Knowledgebase**. The active section has its name highlighted in blue.

Dashboard Workspace Calendar Reports Knowledgebase

#### Dashboard

The **Dashboard** allows the user to see basic information on client jobs, invoices, POs and Projects in the form of special widgets, which can be used to quickly navigate to relevant tables.

#### Workspace

The **Workspace** is where Prospects, Clients, Projects, Corporate Experts, Freelancers and Applicants are managed.

#### Calendar

The **Calendar** is where the time constraints, as well as the status of projects and jobs can be viewed and edited in an easy to read graphical format.

#### **Reports**

The **Reports** section is used to gather, filter and sort data into static and dynamic reports.

#### Knowledgebase

The **Knowledgebase** acts as the central repository of internal manuals and guides for Project Managers, Experts, Sales Executives, HR Managers and Accountants.

# 2.4. Ribbon

The Ribbon is a part of the TO3000 user interface designed to make navigating the program more intuitive.

In each of the five sections on the Navigation Bar, the Ribbon contains a unique set of icons, grouped into tabs, for accessing various related windows or performing other functions.

You can collapse (minimize) the Ribbon either by right-clicking one of the tabs and clicking "Minimize the Ribbon", or by clicking the "**Collapse the Ribbon**" button in the lower-right corner of the Ribbon.

To pin the Ribbon, so that it is always displayed, do the above actions again.

🔾 Search	-	Off 💡 🕵	🖗 🗕 🗗 🗙
Due Date This Week	Open	Due Date In Next 2 Weeks	
Due Date Next Week	Due Date Today	Due Date This Month	
Total Overdue POs	Due Date This Week	Due Date In Next 30 Days Mi <u>n</u> imize the Ribbon	
			Collapse the Ribbon

While collapsed, the Ribbon's icons will only be displayed when you click on a tab, and will be hidden when you click outside the Ribbon.

# 2.5. Dashboard lcons

The Dashboard ribbon has only one tab, also called Dashboard.

The icons on the dashboard Ribbon represent all the available Dashboard widgets. A click on an icon opens the corresponding widget in the main window.

The icons are separated into four groups, according to the subject matter of the widgets.

#### 2.5.1. Client Job Widgets

Open Not Invoiced Volume Volume Due Date Due Date In Due Date D Total Last Month This Month This Week Next 2 Weeks This Month Ne			<b></b>	Q.		<b>A</b>		
Client Jobs	Open	Not Invoiced Total	Volume Last Month	Volume This Month	Due Date This Week	Due Date In Next 2 Weeks	Due Date This Month	Due Date In Next 30 Days

The Client Job widgets display the number and total volume of the corresponding client jobs, Except for "Not Invoiced Total", which displays the total value in the Base Currency rather than the volume.

#### 2.5.2. Invoice Widgets



The Invoice widgets display the number of corresponding invoices. "Total Overdue" also displays the total value in the Base Currency.

#### 2.5.3. Project Widgets



Project widgets display the number of corresponding projects. The "Open" widget additionally displays the total number of projects in any status.

# 2.6. Workspace Icons

The icons on the Workspace Ribbon link to all the main tables used to view and manage clients, projects, experts and all related documentation.

For ease of navigation, the Ribbon is divided into three tabs: **Prospects**, **Clients**, **Projects** (only in With Projects mode).

# 2.6.1. The Prospects tab

Frospect	The <b>Prospect</b> window displays a list of prospective clients and all the information about the selected prospective client. Prospect data is broken into the following tabs: <b>Main,</b> <b>Contacts, Marketing, Prices, Quotes, Prospect Jobs, Invoices, Credit Notes,</b> <b>Payments, Payments, Files, Info.</b> Note that you can not manage Projects, convert quotes into projects, create jobs, invoices, payments, etc., for Prospects. The purpose of these tables in the Prospects tab is to keep track of past transactions with a temporarily or permanently inactive client.
Prices	The <b>Prospects: Prices</b> window provides access to a general price list: each price representing a rate in a chosen currency for a certain service (language pairs, translation, proofreading, etc.). This list also appears in the <b>Clients: Prices</b> tab.
Quotes	The <b>Prospects: Quotes</b> window provides access to all quotes created for prospective clients. This window can be used to add/edit/delete draft jobs for existing prospect quotes.
Prospect Jobs	The <b>Prospects: Prospect Jobs</b> window displays the list of all client jobs undertaken for former or inactive clients.
Invoices	The <b>Prospects: Invoices</b> window provides access to all invoices issued to all temporarily or permanently inactive Clients.
Credit Notes	The <b>Prospects: Credit Notes</b> window lists all credit notes given to all temporarily or permanently inactive Clients.
Payments	The <b>Prospects: Payments</b> window lists all payments received from all temporarily or permanently inactive Clients.
Refunds	The <b>Prospects: Refunds</b> window lists all refunds given to all temporarily or permanently inactive Clients.

# 2.6.2. The Clients tab

Client	The <b>Client</b> window displays a list of clients and all the information about the selected client. Client data is broken into the following tabs: <b>Main</b> , <b>Contacts</b> , <b>Marketing</b> , <b>Prices</b> , <b>Quotes</b> , <b>Projects</b> , <b>Client Jobs</b> , <b>Invoices</b> , <b>Credit Notes</b> , <b>Payments</b> , <b>Payments</b> , <b>Account</b> , <b>Files</b> , <b>Info</b> , <b>Calendar</b> .
Prices	The <b>Clients: Prices</b> window provides access to a general price list: each price representing a rate in the chosen currency for a certain service (language pairs, translation, proofreading, etc.). This list also appears in the <b>Prospects: Prices</b> tab.
Quotes	The <b>Clients: Quotes</b> window provides access to all client quotes ever issued. This window can be used to create a new project based on a quote and add/edit/delete draft jobs for existing quotes.
Client Jobs	The <b>Clients: Client Jobs</b> 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, as well as edit existing client jobs.
# 37 Translation Office 3000 Help

Invoices	The <b>Clients: Invoices</b> window provides access to all currently issued invoices. Use this window to calculate invoice totals, view and edit invoices, print any of these invoices, and perform Mass Invoicing.
Credit Notes	The <b>Clients: Credit Notes</b> window lists the credit notes given to all Clients. Use this window to calculate due totals, link credit notes with invoices and refunds and edit credit notes.
Payments	The <b>Clients: Payments</b> window lists the payments received from all Clients. Use this window to calculate payment totals, link payments with invoices, edit payments and perform Mass Payments.
Refunds	The <b>Clients: Refunds</b> window lists the refunds given to all Clients. Use this window to calculate refund totals, link refunds with credit notes and edit refunds.
Client Accounts	The <b>Client Accounts</b> window displays a simplified balance sheet broken into entries for each client and based on payments from clients and invoices to clients. Accounting staff can use this window to identify which of the clients' accounts require attention. Can be viewed in the Base Currency or Client Currencies.
Business Expenses	The <b>Business Expenses</b> window can be used to make and view entries about any additional expenses.

# 2.6.3. The Projects tab

Project	The <b>Project</b> window displays a list of projects and all information about the selected project. Project data is broken into the following tabs: <b>Main</b> , <b>Tree</b> , <b>Corporate Jobs</b> , <b>Corporate Jobs</b> , <b>Freelance Jobs</b> , <b>Freelance Teem</b> , <b>JAs</b> , <b>POs</b> , <b>Account</b> , <b>Files</b> , <b>Info</b> , <b>Calendar</b> .
Client Jobs	The <b>Projects: Client Jobs</b> window displays a list of all client jobs stored in the database. With the help of this window you can have a quick overview of all client job statuses, calculate client job totals and edit existing client jobs.

# 2.7. Calendar Icons

The Calendar **Ribbon** has only one tab at first, called **Calendars**. The icons on the tab allow you to open one of the two main calendars in TO3000.

When you open a calendar, your ribbon automatically switches to the **Options** tab. If you want to open another calendar, click the **Calendar** tab and click the corresponding icon.

## 2.7.1. The Calendars tab



## 2.7.2. The Options tab

- 1		
	G C	The <b>Backward</b> and <b>Forward</b> icons switch the view to the previous or the next "page" of the calendar.
	Go to Today	The <b>Go to Today</b> icon displays the page containing the current date.
	Reference to the second	The <b>Zoom In</b> and <b>Zoom Out</b> icons change the interval that each row represents in <b>Day View</b> and <b>Work Week View</b> , and the interval that each column represents in <b>Timeline View</b> .
	1 Day View	In the <b>Day View</b> , each page of the calendar covers one day, and is broken into rows representing intervals of time between 5 minutes and 1 hour each (depending on the Zoom level).
	5 Work Week View	In the <b>Work Week View</b> , each page of the calendar covers five days and is broken into columns representing days and rows representing intervals of time between 5 minutes and 1 hour each (depending on the Zoom level).
	7 Week View	In the <b>Week View</b> , each page of the calendar covers one week and is broken into cells representing days.
	31 Month View	In the <b>Month View</b> , each page of the calendar covers five weeks and is broken into cells representing days.

365 Year View	In the <b>Year View</b> , each page of the calendar can cover a quarter, a half- year, or a full year, and is broken into rows representing months and columns representing days.
Timeline View	The <b>Timeline View</b> is used to track a large number of concurrent projects/jobs. it is broken into columns representing half-hours or days (depending on the Zoom level).
31 Group by None	The <b>Group by None</b> icon enables the default layout for all views. It displays all ongoing projects\jobs in the selected period, without splitting them across experts.
Group by Date	The <b>Group by Date</b> icon changes the layout to display which projects/jobs belong to which clients, with precedence given to division by viewed interval.
Group by Clients	The <b>Group by Clients</b> icon changes the layout to display which projects/jobs belong to which clients, with precedence given to division by client.
Compress Weekend	The <b>Compress Weekend</b> icon is only active in Month View and clicking on it will toggle the display of weekends as a single column.
Working Hours	The <b>Working Hours</b> icon is only active in Day View and Work Week View, and clicking on it will toggle the display of off hours in the calendar.

# 2.8. Report Icons

The **Reports** Ribbon is separated into several tabs for different kinds of reports, and each icon represents a specific report template.

## 2.8.1. The Clients tab

Contains Static Reports showing the total funds invoiced by clients.

Cli	ients J	lobs Ir	nvoices I	Payments	Custom	3D
	$\mathbb{Y}$	Y	$\mathbf{V}$	Y	$\mathbb{Z}$	$\mathbb{V}$
All	Тор	Top	Top	Тор	Top	Top
Selected period	5	This yea	r	5	All time	25

The All report adds up invoices within the period specified by the Global Date Filter.

The **Top 5/10/25** reports each come in two versions: **This year** and **All time**. They show the indicated number of clients with the greatest total invoices over either the current year or across

the entire database. They also show the overall percentage of the displayed clients' invoices in your gross revenue.

#### 2.8.2. The Jobs tab

Contains static reports relating to Job productivity, Incomes and expenses, and service sales. All reports on the tab except **Sales History** and **Sales by service** are affected by the Global date filter.

Jobs Chart	A bar diagram showing the monthly total volume of jobs created for a specific client
Jobs Table	Similar to <b>Jobs Chart</b> , but presented as a table.
Total Volume of Completed Jobs	A table showing the total volumes of completed jobs, with columns representing months and rows representing volume units.
Income and Expense Report #1 and #2	Tables showing monthly incomes and expenses, and totalling them to arrive at the overall balance. The two reports differ mainly in layout.
Sales Table	A table showing total sales for each month in the selected period.
Client Sales Report	A table showing the total volume and sum value of each kind of unit sold to a particular client.
Sales by units	A table showing the total volume and sum value of each kind of unit sold to all clients
Total Sales by Clients	Contains separate tables for each client, with the total volume and value of each "Group/service/unit" combination sold to each client.
Sales History Report by Clients	Shows the total volume and value of each unit type sold to each client over the entire history of the database. Not affected by the Global Date Filter.
Sales chart	A bar diagram showing the total monthly sales over the selected period.
Sales History chart	A bar diagram showing the total monthly sales over the entire history of the database. Not affected by the Global Date Filter.
Sales by Service	A pie diagram showing the percentage of specific services in the total sales volume. Not affected by the Global Date Filter.

## 2.8.3. The Invoices tab

Contains reports on performance and service distribution in terms of invoices.

Customer ledger	A table showing the total payments received from each client, further added up to totals in each currency and the grand total in the base currency.
Income Report #1	Shows a list of all payments issued over the selected period, with issue date and total in both client's currency and base currency.
Income Report #2	A table of monthly payment totals from all clients, in the base currency.
Sales chart	A bar diagram showing the total monthly sales over the selected period.
Sales History chart	A bar diagram showing the total monthly sales (based on invoices) over the entire history of the database. Not affected by the Global Date Filter.

#### .....

Contains reports on profits and service distribution in terms of payments.

Account Receivable	Shows the totals of expected payments from each client. Is not affected by the Global Date filter.
Customer ledger	A table showing the total payments received from each client, further added up to totals in each currency and the grand total in the base currency.
Invoice Register	Contains tables showing basic information on all invoices issued to each client (Date issued, Date due, number, value, linked value, currency).
Outstanding Invoices	A table of all invoices, which have not been fully paid yet. Is not affected by the Global Date filter.
Sales chart	A bar diagram showing the total monthly sales (based on payments) over the selected period.
Sales History chart	A bar diagram showing the total monthly sales (based on payments) over the entire history of the database. Not affected by the Global Date Filter.

### 2.8.5. The Custom tab

The Custom tab contains any additional reports added to the database via the Load function in the Advanced Settings>Reports window if the Backstage view.

### 2.8.6. The 3D tab



The **3D** tab contains Dynamic Reports: presets for the Pivot Grid, which can be customized, sorted and filtered to display only the relevant information before being exported to any compatible format. Each of the three reports available has a unique set of fields which can be placed into the Pivot Grid. For more details, see the <u>Dynamic Reports</u> topic.

## 2.9. Knowledgabase lcons

The Knowledgebase Ribbon has only one tab, also named Knowledgebase. The icons there will open one of six knowledgebases included in TO3000 3D+, each dedicated to specific type of freelancer internal notes.

Team	The <b>Team</b> knowledgebase is used for general notes.
TM	Store your translation memory files and software manuals in the <b>TM</b> knowledgebase
CV	The <b>CV</b> knowledgebase is used to store resumes and CVs for different companies and occasions.
Dictionaries	Store your general purpose and specialised dictionaries here.
Glossaries	Store project-specific glossaries here. This is especially useful if you are frequently contacted by the same client.
Other	Any useful notes and files that do not fit in other categories can be stored here.

## 2.10. Local custom filter

The Local Custom Filter is an essential tool that is used to search for specific data in large tables.

In TO3000 3D+, the Local Custom Filter consists of three main parts: the <u>Filter Builder</u>, the <u>Filter</u> <u>Box</u> and the <u>Column filters</u>.

### 2.10.1. Filter builder

The filter builder can be accessed directly via the "Advanced..." button in the Filter box or the additional button in the Page navigation panel

	1000000	L OBDIOTOG	
Filter builder - [untitled.fit]			X
Filter <u>AND</u> <root></root>			
<u>Client</u> <u>contains</u> Network			
<u>OR</u> applies to the following co	onditions		
Add Condition			
dd <u>G</u> roup			
× Remove Row			
press the batton to add a nev	v condition		
Open Save As	ОК	Cancel	<u>A</u> pply
Advanced 🗙 🗹 (Client contains Netwo	ork) and ((Flag is blank) or (Co	mpleted is past))	
₩ • • • • • • • • • • • • • • • • • • •	M 🖓 🔽 🕢		

The **Open...** button browses for previously saved FLT files.

The Save as... button saves the current settings of the Local Custom Filter as an FLT file.

The **Filter** button and the "..." buttons next to conditions and condition groups are used the add and remove conditions and groups.

When setting up a filter condition you select the column to be filtered, the operator and enter the comparison value(s), if needed.

#### **Standard Operators**

=	equals			
≠	does not equal	Mathematical aparators are used primarily on fields with		
<	is less than	numerical values. They can also be used on text strings.		
$\leq$	is less than or equal to	Equals/Does not equal can also be used on fields with a		
>	is greater than	predetermined set of possible values.		
≥	is greater than or equal to			
abc	contains	Contains/Does Not Contain take strings of text as values and		
acb	does not contain	either display or exclude all entries where the indicated field contains that string.		
[a]b	begins with	Begins With/Ends With are similar to Contain, but are satisfied		
b[c]	ends with	only if the target string is found at the beginning or end of a filed's contents.		
0	is blank	Is Blank/Is Not Blank take no values. They simply display or		
0	is not blank	exclude entries, where the indicated field is blank.		
4	between	Between/Not Between take two values that define an interval		
14	not between	and either display or exclude all entries where the indicated field's value is within the interval.		
		In/Not In can take any number of values and display or exclude		
000	in	all entries where the indicated field's value matches any value in the		
000	not in	New values can be added to the set with the '+' button to the left		
		of the last entered value.		

### **Condition Groups**

Conditions can be assembled into groups. Groups can also contain other groups. In Filter builder, all conditions and groups are considered to be part of the <root> condition group.

How conditions in a group are processed depends on the group's logical operator:

- AND entries must satisfy all conditions in a group
- OR entries must satisfy at least one condition in a group
- NOT AND entries must violate at least one condition in a group
- NOT OR entries must violate all conditions in a group

Removing a condition group will also remove any conditions or groups within it.

To clear the current filter altogether, click "Filter>>Clear All".

### 2.10.2. Filter box

The Filter Box, located just above the Page Navigation panel, displays the filter currently in effect.

The check-box to the left of the filter expression will enable/disable the filter, while the X symbol will clear it.

Clicking the description will bring up a menu of the last eleven previously used filter expressions

The Advanced... button opens the Filter Builder.



#### 2.10.3. Column Filters

Hovering the cursor over a column header reveals a small Filter symbol in the upper-right corner of the header.

Clicking the symbol opens a drop-down menu containing a checklist of all the currently displayed values in that field, and two special options: (All) and (Custom...).

Currency		E-Mail
EUR	(All) (Custom)	info@netcommunity-tech.com
EUR	China	hr@illustrative-design.com
EUR	🗹 Finland	info@internet-security.fi
EUR	France	general@dn-entertaiment.com
	🗹 Germany	
	🔲 Italy	
	🔲 Japan	

Checking one or more of the values in one column automatically creates a filter that displays only entries containing the checked values.

Checking values in several columns will only display entries that satisfy the conditions in ALL columns.

Clicking (All) will remove the filter conditions for that column.

Clicking (Custom...) will open a special window where you can specify up to two conditions for that column, with any operator, and choose an AND or OR relationship for the two conditions.

	Custom Filter	х
	Show rows where:	
	Name	
l	like 🔻 Digital%	
	O AND OR	
	equals   Massive Archway, Inc	
	Use % to represent any series of characters	
1	Use _ to represent any single character	
1	OK Cancel	

If three or more values are already checked, clicking (Custom...) will open the Filter Builder instead.

## 2.11. Global date filter

The global date filter can be set to display only the records that fall within a certain time interval. For example, you can set the global date filter to display only records for a certain year, quarter, month or to specify a custom time interval.

		_	8	x
🔍 Search 🝷	Off 💡 🕵 🕏		- 6	× 4

The three buttons on the filter display are, left to right: **Edit** (opens the filter's dialog window), **Off** (clears the current filter), and **Recent** (restores the most recent previously used filter).

The global date filter's effect is not limited to the currently open window. Once applied, it works in all date-relevant records.

### **Filter Options**

\*All Dates\*/Off - the default setting. The filter tis not active.

Preset period - select a specific year, quarter, or month to view.

Edit Global Date Filter				x
*All Dates* Preset Period Custom Period	Year Quarter Month	2017 2016 2015 2014 2013 2012 2011 2010 2009 2008 2007 2006 2005 2004 2003 2002	Jan-Mar Apr-Jun Jul-Sep Oct-Dec	X
			OK Cancel	

Custom period - manually select the start and/or end

Edit Global Date Filter			х
*All Dates* Preset Period Custom Period	Start:	22.05.2016 31.03. <mark>2017</mark>	

#### Affected areas

The following windows and tabs are affected by the global date filter:

In the **Prospects** Workspace tab:

- The Prospect window tabs: Marketing, Quotes, Prospect Jobs, Invoices, Credit Notes, Payments, Payments and Accounts.
- The Prospects: Quotes window.
- The Prospect Jobs window.

- The Prospects: Invoices window.
- The Prospects: Credit Notes window.
- The Prospects: Payments window.
- The Prospects: Refunds window.

In the Clients Workspace tab:

• The Client window tabs: Marketing, Quotes, Projects, Client Jobs, Invoices, Credit Notes, Payments, Payments and Accounts.

- The Clients: Quotes window.
- The Client Jobs window.
- The Clients: Invoices window.
- The Clients: Credit Notes window.
- The Clients: Payments window.
- The Clients: Refunds window.
- The Business Expenses window.
- The Client Accounts window.

In the Projects Workspace tab:

- The Project window tabs: Main, Client Jobs.
- The Client Jobs window.

Most Static Reports are also affected by the filter.

**NOTE:** The **Global date filter** affects the whole database. If you change it in one tab or window, it will change globally throughout the TO3000 3D+ database.

**NOTE:** The **Global date filter** setting is saved when you close the program and will be used next time you run TO3000 3D+.

## 2.12. Global Search

Use the Global Search field near the Global Date Filter to search for a specific string of text across the entire database.

Once the search is complete, a Search Results windows will open, Where you can review and refine them.

			-	ð		x
$\mathbf{Q}$ translation	•	Off 🂡 🕵 🖏		-	8	×

#### **Result tables**

Search Results are displayed in table form in two separate tabs: Objects and People.

- The Objects table contains Projects, Jobs, Invoices, Payments, and other documentation. It is divided into four columns: Context (i.e. the table, where the object is found), Code, Name, and Assigned (date).
- The People table contains Clients, Contacts and Prospects. It is divided into four columns: Context, Name, E-mail, and Phone.

Both tables are initially sorted by Context. Double-clicking a result will take you to the table where it originates from.

	Objects [42]	People [7]	
*	Context	Name	E-mail
	Client	Unlimited Concepts Unified	translations@unlimited-concepts.es
	Client	Translation Designs	
	Client	Definition Designs	translations@definition-designs.net
	Contact	Roswell Greenstone	roswell.greenstone@translation-design.com
	Contact	Jessie Classen	jessie.classen@translation-design.com
	Contact	Eric Parker	doc_dept@translation-design.com
۲	Prospect	Internet Security Technologies	info@internet-security.fi, translations@interr

#### **Refining search results**

The left-hand side of the Search Results window consists of a dialog box used to alter the search parameters and refine the results.

The Search Area window displays all the tables to be searched. You can check and uncheck any of them to define the exact scope of the search.

You can also determine whether the search is case sensitive, define the maximum number of results displayed from each context, and set the maximum age of entries to appear in the results (only affects Objects).

After making the desired alterations to the parameters, click **Search** to apply them.

Search for:	
translation	Search
Search area:	
<ul> <li>Projects</li> <li>Prospects</li> <li>Profiles</li> <li>Clients</li> <li>Profiles</li> <li>Contacts</li> <li>Quotes</li> <li>Jobs</li> <li>Invoices</li> </ul>	
Case sensitive	
Limit search results to:	20 🗘 entries per context
Search only:	All time 🔹

## 2.13. Find Panel

All Tables in TO3000 3D+ can be searched for specific strings of characters with the Find Panel local search function.

	Digit		▼ Find Clear	
*	Code	Name	Client	
۲	Q-DFC0001	Power Redirection System Guide1	Digital First Concierge	
	Q-IUC0002	Digital Library Program Guide	Internet Unified Corp.	
	Q-DNE0001	Document Search Tools Localizatio	Digital Network Entertaiment	
	Q-DNE0002	The Avalon Project	Digital Network Entertaiment	
	Q-GCU0002	Security Digital Library	Global Concepts Universal	
	Q-DFC0002	NCAA sports rulebooks	Digital First Concierge	

Enter the string to search for into the field and click Find.

The table will now display only the records which contain that string, and highlight the string in question.

Click **Clear**, and the table will display all records again.

# 2.14. Right-click menu

The right-click menu can be opened by right-clicking any table in the TO3000. The commands it contains depend on the table in question.

## 2.14.1. Context jumps

Right click an entry in tables such as Jobs, Payments, or Quotes and you will be able to quickly jump to connected entries on other tables.

After clicking the **Open Client** option you will jump to the **Client** window, the exact tab depends on the window opened and the entry you right-clicked.

Q	Quotes to Clients   Client: Future Unified Resources											
	Edit											
*		Client		Assigned	Deadline							
		Enigma Server Technologie	s, I	07.05.2016 09:00	28.05.2016 18:00							
•	Cŧ	c Future Unified Resources		Open Client	03.06.2016 18:00							
		Network Community Techn		Open Project	14.09.2015 09:00 18.10.2016 18:00							
		Internet Unified Corp.		Open Expert	02.07.2016 18:00							
		Internet Unified Corp.		Grid Settings	14.11.2016 18:00							
	H	Unlimited Concepts Unified		Export	09.01.2015 18:00							
	A Unlimited Concepts Unified			Print	01.10.2016 18:00							
		Intelligent Interworks	-	03.00.2016 09:00	14.06.2016 18:00							

Example:

If the **Clients: Quotes** window is opened and you right-clicked a certain entry, then clicked **Open Client,** TO3000 will switch to the **Quotes** tab of the **Client** window, displaying all the quotes of the corresponding client.

The Open Project and Open Expert options work similarly.

Clicking **Open Project** switches to the corresponding tab of the **Project** window, displaying data associated with the corresponding project.

**Open Expert** switches to the corresponding tab of the **Expert** window, displaying data associated with the corresponding expert.

## 2.14.2. Grid Settings

This set of options toggles the presence of several additional interface elements in any Workspace table.

Hover your mouse over "Grid Settings" and the following options will appear:

- 1. Show Find Panel toggles the Find Panel local search interface.
- 2. **Show Group Box** toggles the Group Box layout control interface. Note that hiding the Group Box does NOT reset the appearance of an already grouped table.
- 3. Show Filter Box toggles the additional interface for the Local Custom Filter.
- 4. **Show Footer** toggles the footer showing the grand total of fields like "Total paid (Base Currency)" for all entries currently shown. Note that disabling this does NOT remove the subtotals shown for each group in a grouped table.
- 5. **Show Navigator Filter Button** toggles the button for Filter Builder access next to the page navigation buttons.

The following screenshot shows all five options enabled and numbered in accordance with the above list:

Enter text to sea	rch		▼ Find	Clear	φ						
rag a column he	ader here to group by	that	column								
	Client		de	Date R	eceived	Total Paid	Linked	Currency	Exchange Rate	Total Paid (EUR)	Linked (EU
The Illustrative P	Open Client	-	P-ILLDES0001	28.03	.2016	45,00	45,00	EUR	1,00	45,00	4
The Illustrativ	Open Project	F	P-ILLDES0002	11.01	2014	1 400,00	0,00	EUR	1,00	1 400,00	
ne Lightning	Open Expert	F	P-LIGRA0001	19.04	.2015	500,00	0,00	USD	0,77	385,00	
ligital First C	Cold Coldina A		P-DFC0001	09.08	.2016	57,60	57,60	USD	0,77	44,35	4
ne Lightning	ond settings 🔹	×.	Show Find Panel		014	100,00	0,00	USD	0,78	468,00	
nigma serve	Export	×.	Show Group Box		015	100,00	224.00	LICD	1,00	100,00	10
uture Unifieram	Print	4	Show Footer		016	1 500 00	1 500 00	ELIR	1.00	1 500,00	1.50
uture Unified R	esources	-	Show Navigator Filter But	ton	016	1 500,00	1 500,00	FUR	1,00	1 500,00	1 50
letwork Commi	inity Technologies	Ŀ	P-NETCOM0001	10.12	2014	1 000,00	1 000 00	FUR	1,00	1 000,00	1.00
Jetwork Commi	inity Technologies		P-NETCOM0002	30.07	2016	3 000 00	3 000 00	FUR	1,00	3 000 00	3.00
nternet Unified	Corp.		P-IUC0001	19.12	.2016	1 000,00	1 000,00	EUR	1	1 000,00	1 00
									· •	101 295 97	88.75

### 2.14.3. Flags

The Main tab of all Workspace tables includes a Flag field. Flags are a handy visual way of indicating any special statuses for clients or projects.

To change the Flag for a table entry, just right-click the entry and select one of seven flag colors or the "No flag" status.

м	ain	Contacts	Ma	rketing	Ρ	rices	Quotes	Proj	ects
	N	ew Client		<u>D</u> elete	2		-		
E	nter	text to sear	ch			•	Find	Clea	ar
*	E-M	ail				P	none		
a	unlin	nited-conce	pt						
									P
na	a-sen	ver.com					No Flag		
le	-netv	work.no				P	Red		
ц	rces-	global.com				Pink Pink			
in	ng-gr	aphics.com				P	Magenta		P
)a	alcon	cepts-univ.c	om			P	Orange		
v	e-de	sign.com		+358-84	4-	P	Yellow		P
-	-concierge.ru mmunity-tech.com ve-archway.co.uk			+7 445 (	66	P	Green		P
n						P	Blue		P
/6							Grid Setting	s 🕨	P

## 2.14.4. Special Client Job options

The Right-click menu of the Client Jobs tab in the Projects (in With Projects Mode) or Clients (in Without Projects mode) contains two special options:

0018, Engine scheme ER-34221: Client Jobs 💌											
Main	Files	In	fo	Calend	ar						
<u>N</u> ew <u>E</u>			dit	t <u>D</u> elete			]				
* C	ode	J	ob Nan	ne		Proj	ect Code				
• J-C J-C	J-C J-C Grid Expr		t	•	34221 34221 34221	0018 0018 0018					
	An Cle	yCount one									

# 2.15. Hot keys

To use *hot keys* in TO3000 3D+, press Alt and an underlined character of an appropriate button on the TO3000 3D+ window.

Clients: Prices -			
New	<u>E</u> dit	<u>D</u> elete	

Press Ctrl+E to call up the Local Export dialog.

# 3. Backstage

Most settings for TO3000 are available via the Backstage view.

To open the Backstage view, click the Backstage view button near the upper-left corner of the window.

<b>R</b>		۵	₹
	2	Pro	spects

You will see the following options on the left-hand side:

- The User settings option gives access to settings controlling the usage and general appearance of TO3000.
- The **Business settings** option gives access to settings that affect the database, such as the list of services offered or template storage locations.
- The **Advanced settings** option gives access to settings that affect the TO3000 system itself, such as workflow modes or documentation codes.
- The Database settings option Give access to database backup/restoration and updating.
- The Help option allows you to check for updates and download new builds of TO3000, enter your license code when you Register or Upgrade your installation of TO3000, or view current the version and build information of your TO3000.
- The Exit command ends your work session with TO3000.

## 3.1. User settings

To open the **TO3000 3D+ Personal settings** window, enter the Backstage view and click the **User Settings** command.

User Settings	Appearance
Business Settings	<ul> <li>Confirmations</li> <li>Colors: Status</li> <li>AnyCount</li> </ul>
Advanced Settings	Email
Database Settings	
Help	

#### 3.1.1. Appearance

Here you can customize the general appearance of TO3000 3D+.

Skins - choose between several skins for TO3000.

**Color Scheme Accent** is only active when No Skin is selected and determines the color of the header in the main window and the sidebar in the Backstage view.

Interface Font and **Interface Font Size** - chose and size the font used for the TO3000 interface and tables.

**Use System Font** instantly switches the used font to the one used by your system interface.

**Rich-View Font** and **RichView font Size** - Choose the default font for large test fields like the General Information fields or Knowledgebase topics.

**Use Default Font** resets the RichView font to Times New Roman, size 12.

**Touch-Friendly User Interface** - check this to make interface buttons larger and easier to use with a touchscreen.

**Collapse Ribbon** - check to hide the Ribbon whenever it is not in active use. This can also be set by right-clicking the Ribbon itself.

**Save Workspace state on logout -** check to save the state of all windows open in the **Workspace** and re-open them automatically when you launch the program next time.

**Remember last open tab in Clients, Projects -** if checked, new Clients and Projects windows will open on the same tab the last window of the same type was closed on. Otherwise, they will always open on the Main tab.

<ul> <li>Appearance</li> <li>Confirmations</li> </ul>	Skins:	Color scheme accent:				
🧐 Colors: Status	Classic 🔹	Blue				
AnyCount Position of Custom Fielc Email	Interface font: The Segoe UI	Interface font size:				
eman	RichView font: Touch-friendly user interface Collapse Ribbon Save Workspace state on lo Remember last open tab in	RichView font size: 12  Use Default Font ce bgout n Clients, Projects				

### 3.1.2. Confirmations

Here you can select form a number of automatic consistency checks that will help identify disparities in job and project parameters.

If the parameters violate a consistency check, a warning message will be displayed on screen when trying to enter these parameters into the database.

Date Check - checks whether the timelines within jobs and the timelines between projects and their jobs do not contain disparities, (e.g. a job's deadline being earlier than it's assignment, or a job's completion being later than the completion of it's parent project). There are three options for Date Check:

- Notify and Deny an error message will appear and the new data will not be entered.
- Notify and Ignore (optional) a warning message will appear, and ask the user whether they want to ignore the disparity and enter the new data.
- No Check Date Check is disabled completely.

Appearance							
✓ Confirmations	Dates check: Assigned, Deadline, Completed:						
<ul> <li>Oclors: Status</li> <li>AnyCount</li> <li>Position of Custom Fields</li> <li>≥ Email</li> <li>Local File Store</li> </ul>	<ul> <li>Notify and deny</li> <li>Notify and Ignore (optional)</li> <li>No check</li> </ul>						
	Description:						
	Middle Level. In case of the dates' disparity, the user will receive an error message with two options: Ignore or Fix the disparity for further processing.						

#### 3.1.3. Colors: Status

To make job, project, quote and invoice tracking more effective, TO3000 3D+ uses different colors to mark records with different statuses.

You can change the colors to mark off item status on the Colors: Status tab of the User settings.

To open the **Colors: Status** tab, go to **Backstage > User Settings** and click **Colors: Status**.

Use the corresponding buttons to open a 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.

<ul> <li>Appearance</li> <li>Confirmations</li> <li>Colors: Status</li> <li>AnyCount</li> <li>Position of Custom Fields</li> <li>✓ Email</li> <li>Local File Store</li> </ul>	Current Projects and Jobs: Deadline is in the future: Deadline is today: Deadline is in the past:	Use warning color days and t t hours in advance	Quotes:          Accepted         In Process         Rejected         Regeived         Corrected
	Outstanding Invoices:       Not Due Yet:       Due today:       Overdue:		Currently selected row in all tables:

#### 3.1.4. AnyCount

You can specify AnyCount settings (general and specific for different file formats) on the **AnyCount** tab of the **User Settings** window.

<ul> <li>Appearance</li> <li>Confirmations</li> </ul>	🖺 CSV  🖞 P	DF TXT	🖄 XML	🔝 MIF	🕐 HLP	🗳 снм	🗟 odt,	SXW, SDW
Olors: Status	🚺 ODS, SXC, SDC	lodp, sxi	i, SDD	SLP 🗵 .F	PUB 🕙 .\	/SD, .VSDX	🖄 .BMP, .JP	G, .PNG, .GIF
AnyCount Position of Custom Fields	Common	Doc, rt	F, WPD, DOCX	8	XLS, XLSX	🖳 ррт	, PPS, PPTX	🖲 HTM
🖂 Email 🖳 Local File Store	Skip Numbers							
	Show Full Path							
	Multi-Core Proces	sing						

#### **Common options**

When the **Skip Numbers** check box is selected, AnyCount produces a count omitting numbers in the documents.

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

Multi-Core Processing should only be enabled on multi-core machines.

#### File type specific options

To configure counting options for specific file types, click the tab with the required file type. Different file types have different options, mostly concerning which types of contents should and should not be counted.

**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.

#### 3.1.5. 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 major part of the database — **Clients**, **Projects/Prospects** and **Business Expenses**. Custom fields can be grouped into custom groups.

Custom fields can be added on the <u>Custom Fields</u> section of the **Advanced settings** window.

On the **Position of Custom Fields** section of the **User settings** you can change how custom field groups are displayed.

To open the **Position of Custom Fields** tab, go to **Backstage > User Settings** and click **Position** of **Custom Fields** in the left part of the window.

Choose either the Top or Left option to place custom groups' tabs in the corresponding location.

Appearance		
✓ Confirmations	Position of group tab :	Example
🧐 Colors: Status 掻 AnyCount	⊚ Тор	Group1 Group2 Group3
📰 Position of Custom Fields 🖂 🖂 Email	○ Left	Custom fields of group 1
昌 Local File Store		

## 3.1.6. Email

Here you can set up an e-mail connection for TO3000.

Enter the Address, connection type, and access credentials (if needed) for your SMTP server.

<ul> <li>Appearance</li> <li>Confirmations</li> <li>Colors: Status</li> </ul>	SMTP Server
AnyCount Position of Custom Fields	Server:
🖂 Email	Connection: Regular
🖶 Local File Store	Port: 25
	Use Authentification
	User Name:
	Password:
	Save outgoing mail into IMAP folder: Do not save mail Configure
	From
	Name: William McSun
	Email Address: wms@translation3000.com
	Organization: Vitaliy Gutyk
	Connection Test

Also you can set up an IMAP folder to store your outgoing mail:

- 1. Click Configure to open the Edit IMAP Sent Folder window.
- 2. Enter the Address, connection type, and access credentials to the IMAP server.
- 3. Import the server's folder list and choose the folder for your Sent mail.

dit IMAP Sent Folder		X
IMAP Server		
Server:		
Connection:	Regular 🔹	
Port:	143	
User Name:		
Password:		
	Request IMAP Folder List	
IMAP Sent Folder:	Do not save mail	
	OK Cancel	

You can also specify the default 'From' line of your TO3000-generated e-mails by entering your name, e-mail and company name.

Click Connection Test to check if the connection parameters were entered correctly.

# 3.2. Business settings

To open the **Business Settings** window, enter the Backstage view and click the **Business Settings** option.



## 3.2.1. Groups of Services

On the **Groups of Services** tab you can specify the kinds of services you offer to your clients (e.g. translating, editing etc.). When creating jobs or setting prices in TO3000 3D+ you will have the possibility to specify the group of services, selecting it from the list created here.

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

Checking **Not Available for future choice** will prevent the group from appearing in the drop-down lists of the New/Edit Job windows.

A group of services cannot be deleted if it has any services in it.

Groups of Services			<u>N</u> ew	<u>E</u> d	it	<u>D</u> elete	
Services Volume Units Unit Ratios Currencies Exchange Rates		*	Click - None - Consulting	Gro here to	up define a	filter	
<ul> <li>Taxes</li> <li>Discounts/Markups</li> <li>Countries</li> <li>Categories</li> <li>Payment Methods</li> <li>Templates</li> <li>Email Templates</li> </ul>	New Service Group	s: for	future choice				× 5
					ОК		Cancel

### 3.2.2. 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 3D+ you will have the possibility to specify the service, selecting it from the list created here.

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

Checking **Not Available for future choice** will prevent the Service from appearing in the dropdown lists of the New/Edit Job windows.

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

Groups of Services			New	Edit	<u>D</u> elete	
Services						]
🗿 Volume Units		*	Group of Service	es	Service	
📲 Unit Ratios		٩	Click ł	here to de	efine a filter	
\$ Currencies			- None -	- N	one -	
≒ Exchange Rates		r	Other	Add	litional work	
📄 Taxes		Ê	other	Add	Internal work	
Discounts/Markups	Edit Service					? X
🔮 Countries						
<ol> <li>Categories</li> </ol>	Service:					
Payment Methods	Additional work					
🖬 Templates						_
🛅 Email Templates	🗌 Not Available	for	future choice			
	Crown					
	Group:					
	Other					-
				0	K	Cancel
l		1	Lausiausu			

#### 3.2.3. 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 job volumes.

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

Groups of Services			<u>N</u> ew	<u>E</u> dit	<u>D</u> elete		
O Volume Units		*		Name			
📲 Unit Ratios	Ratios		(	Click here to defi	e to define a filter		
\$ Currencies		-	- None -				
📛 Exchange Rates		-	characters	(with spaces)			
Taxes			characters	(with spaces)			
Discounts/Markups	Edit Volume Unit						? X
Countries	Name:						
Categories							
Payment Methods	lines (55 characters	)					
Templates	🗹 Used by AnyCou						
Email Templates				-			
	Volume Unit cons	ists	s of:				
			55 Unit	t Type			
			01	Words			
			0	Characters (with s	(naces)		
				characters (with s	,pucco,		
			0	Characters (witho	ut spaces)		
					01/		Canaal
					OK		Cancel

To add a new custom volume unit, click the **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 the built-in AnyCount:

select the 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 text volume, e.g. "hours", leave the Used by AnyCount option unselected. Instead, you may check the Used by ExactSpent box to allow the unit to be used in tandem with the ExactSpent program.

#### 3.2.4. Unit Ratios

On the **Unit Ratios** tab of the **Business Settings** window you can specify how many basic units (words by default) any Volume Unit is equivalent to.

This is used when calculating Job volumes as converted into basic units.

Groups of Services			<u>N</u> ew <u>E</u> dit <u>D</u> elete			
Volume Units	•	*	Unit	=words		
📲 Unit Ratios		ę	Click here to define a	filter		
\$ Currencies			haracters (with spaces)	0	15	
📛 Exchange Rates			· · · ·			
📄 Taxes	New Unit Ratio					? X
Discounts/Markups						
🌍 Countries	1 cha	ara	cters (with spaces)	-	words	<
<ol> <li>Categories</li> </ol>	-			-	word.	
Payment Methods						
Templates						
🛅 Email Templates						
					O	K Cancel

The **New** button opens the **New Unit Ratio** window, which can be used to select a volume unit form a drop-down list and enter how many basic units the unit is equivalent to.

The Edit button opens currently highlighted unit ratio for editing.

The **Delete** button deletes currently highlighted unit ratio.

### 3.2.5. 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 3D+ financial records. To open the **Currencies** tab click **Currencies** in the left part of the <u>Business settings</u> window.

Groups of Services		New	<u>E</u> dit	<u>D</u> elete
Volume Units		<ul> <li>Currency</li> <li>Click here</li> <li>AUD</li> </ul>	Description e to define a filt Australian Dolla	er ar
<ul> <li>Exchange Rates</li> <li>Taxes</li> <li>Discounts/Markups</li> <li>Countries</li> <li>Categories</li> <li>Payment Methods</li> <li>Templates</li> <li>Email Templates</li> </ul>	Edit Currency 3-letter Abbrev AUD Descriptive Na Australian Doll	viation: ime: lar		x
		ОК	Cance	el

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

#### 3.2.6. Exchange Rates

TO3000 3D+ provides you with the ability to assign a different *client currency* to each *client*, and still be able to see 'the whole picture' using your *base currency*. (The b*ase currency* is set in the <u>General</u> section of the **Advanced Settings** window)

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

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

Groups of Services			<u>N</u> ew	<u>E</u> dit	<u>D</u> elete
O Volume Units		*	Currency	=EUR	
📲 Unit Ratios		٩	Click	lter	
S Currencies			AUD	Australian Dollar	0,6501
🚍 Exchange Rates	New Exchange Rate				7 X
Taxes	_	_			
Discounts/Markups	4 400				
Countries	1 AUD		• = El	лк	
<ol> <li>Categories</li> </ol>					
Payment Methods					
Templates					
📹 Email Templates					
				ОК	Cancel

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

**NOTE:** The currencies list consists of currencies added on the <u>Currencies tab</u> of the <u>Business</u> <u>settings</u> window.

#### 3.2.7. Taxes

TO3000 3D+ provides you with the ability to automatically consider taxes when issuing invoices. You can specify tax names and rates on the **Taxes** tab of the **Business Settings** window. To open the **Taxes** tab click **Taxes** in the left part of the <u>Business settings</u> window.

Groups of Services			<u>N</u> ew	<u>E</u> dit	<u>D</u> elete
Volume Units		* ? I	Name Click here to Tax return	Value define a filter -7,00	
Exchange Rates     Taxes	Edit Tax				? X
<ul> <li>Discounts/Markups</li> <li>Countries</li> <li>Categories</li> <li>Payment Methods</li> <li>Templates</li> <li>Email Templates</li> </ul>	Tax Name: Tax return Tax Value (%)	7,00			
				ОК	Cancel

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

#### 3.2.8. Discounts/Markups

TO3000 3D+ provides you with the ability to add and automatically consider discounts and markups when issuing invoices.

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

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

Groups of Services			<u>N</u> ew <u>E</u> dit	<u>D</u> elete	
Volume Units Unit Ratios Currencies		* 9 T	Name Click here to define a	Value a filter	
📛 Exchange Rates 📄 Taxes	Edit Discount		Early payment discount	-7,00	? X
<ul> <li>Discounts/Markups</li> <li>Countries</li> <li>Categories</li> <li>Payment Methods</li> <li>Templates</li> <li>Email Templates</li> </ul>	Discount Name: Early payment di Discount Value(%	sco )	unt -7,00		
			ОК		Cancel

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

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

### 3.2.9. Countries

When creating a new *client* record in TO3000 3D+ you can enter the postal address and specify the country by 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, the TO3000 3D+ database already contains an almost exhaustive list of countries.

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

The entries for each country contain it's name, flag (optionally), and time zone.

Groups of Services		New Edit	Delete		
Services			<u>_</u>		
Volume Units	*	Name	Time Zone	Time Zone Reristry Name	Flag
🛱 Unit Ratios	٣		Click here to define	a filter	
Currencies		Denmark	(UTC+01:00) Brussels, Copenhag	Romance Standard Time	
🕽 Exchange Rates		Diibouti	(UTC+03:00) Nairobi	E. Africa Standard Time	
Taxes		Dominica	(UTC-04:00) Georgetown, La Paz,	SA Western Standard Time	-0-
Countries		Dominican Republic	(UTC-04:00) Georgetown, La Paz,	SA Western Standard Time	
Categories		East Timor	(UTC+08:00) Kuala Lumpur, Sing	Singapore Standard Time	$\rightarrow$
Payment Methods		Ecuador	(UTC-05:00) Bogota, Lima, Quito	SA Pacific Standard Time	ö
Templates		Egypt	(UTC+02:00) Cairo	Egypt Standard Time	528
Email Templates		El Salvador	(UTC-06:00) Central America	Central America Standard Time	ø

## 3.2.10. Categories

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

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



To add a new category click the **New** button, and enter it's name.
## 3.2.11. Payment Methods

**The payment method** is one of the many parameters that can be added to an invoice when it is issued with TO3000 3D+. The payment method contains details for performing the payment (bank details, for example).

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

To open the **Payment Methods** tab click **Payment Method** in the left part of the <u>Business settings</u> window.

Groups of Services Services Volume Units Unit Ratios Currencies	( * 7 1	New Paymo Click here Bank wire tra	Edit ent Method to define a filter	<u>D</u> elete
Taxes Discounts/Markups Countries Categories	Edit Payment Method Payment Method: Bank wire transfer			? X
<ul> <li>Payment Methods</li> <li>Templates</li> <li>Email Templates</li> </ul>	Description: (Bank account detai	ls)		·
			OK	Cancel

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

## 3.2.12. Templates

All documents issued in TO3000 3D+ can be saved in the .rtf format and/or printed/sent via Email using corresponding .rtf templates.

All templates are stored in subfolders of the Templates folder at C:\Users\Public\Documents\AIT\TO3000, Version 3D\Templates.

On the **Templates** tab of the **Business settings** you can manage templates and folders inside the Templates folder.

Tree filed displays the structure of template folders. By default, the Templates folder contains three subfolders: CLIENTS, PROSPECTS and PROJECTS. The CLIENTS and PROSPECTS folder contain separate subfolders for each document type.



## **File options**

Template files contained in the currently selected folder are displayed in the right field. Doubleclick a template to edit it. Selecting and right-clicking a file or folder will open the standard Windows context menu for it.

# 3.2.13. Email templates

Here you can create and edit Email templates - standard messages meant to accompany template based documents when sending them to your clients via the <u>Mail Sender</u>.

🖶 Groups of Services			New	Edit	Delete		
Services							
🕜 Volume Units	Clients		* Templat	te name		Te	mplate subject
📲 Unit Ratios	Prices		<b>Υ</b>			Click here to define	a filter
\$ Currencies	Quotes		T Invoice to d	lient - 1		ODE) for \CLIENT NAM	E)
📛 Exchange Rates	Jobs		anvoice to c		noice prototet_e		
📄 Taxes	Invoices	Edit Client Invoices template					? X
Discounts/Markups	Payments						
🌑 Countries	Credit Notes	Name:					
<ol> <li>Categories</li> </ol>	Refunds	Invoice to client - 1					
Payment Methods	Prospects						
Templates	Prices	Template subject:					
Email Templates	Quotes	Invoice \INVOICE_CODE\ fo	or \CLIENT_NAM	IE\			
	Projects	Template text:					
		Dear \CONTACT_NAME					<u> </u>
		Thank you for the opportu \INVOICE_CODE\ for the r I look forward to working v Kind Regards, \CURRENT_USER_NAME\ \COMPANY_NAME\ \ATTACHPDF\	nity to do busin. ecent services I   with you again s	ess with you. F provided. Pay oon.	Vlease review the a ment is due \CLIEN	ttached invoice, ≢ IT_PAYMENT_TERMS\	~
		Note: You can use variable	s from the corre	esponding RTI	F templates		
						ОК	Cancel

The left frame contains the list of RTF template-based documents, and the right frame contain a list of email templates for the currently selected type.

Use the New, Edit and Delete buttons to manage the email templates.

When editing E-mail Templates, you can add the same variables that are used in the corresponding RTF templates both to the subject line and the body of the e-mail. See below for a list for links to topics covering all variables.

# 3.3. Advanced settings

**Advanced settings** can be used to manage the more complex aspects of TO3000 3D+, like global *codes*, folder settings, *database customization* and *custom report* building.

To access **Advanced Settings** enter the Backstage view and click the **Advanced Settings** option.



# 3.3.1. General

This tab of the Advanced Settings includes a set of general options for TO3000 3D+:

General Workflow Mode Folders Codes	My Logo	
Salutations Template variables	Base Currency:	EUR
🍓 Queries 🖏 Fields	Base Unit:	words
Reports CATCount	Postal Address Format:	Street Address 1 Street Address 2 City State ZIP Code Country
	${f V}$ Invoices in the middle of the r	ange can be deleted
	□ Enable numbering of Client Inv ✓ Enable ExactSpent feedback	voice copies

## Changing your logo

You can load you personal logo into TO 3000 by clicking the **My logo** button and choosing **Paste** or **Load**. A miniature version of it will appear on the **Backstage** button.

#### Changing the base currency

To set your **Base Currency**, click the **Base Currency**: button. The list of currencies available for selection can be configured with the help of <u>Currencies</u> section of <u>Business settings</u>. After switching to a different currency, you will immediately be prompted to define it's exchange rates to all other currencies.

## Changing the base unit

To set the Base unit for your database, click the Base Unit button and select a unit from the dropdown list. After switching to a different unit, you will immediately be prompted to define it's ratios to all other units.

## Postal address format

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

Edit Postal Address Format			×
Street Address 1		Move Up	
Street Address 2		Move Down	
State		Move Down	
ZIP Code			
Country			
		Reset format	
Address Fields Delimiter:			
	ОК	Cancel	

Use the **Move Up** and **Move Down** buttons to change order of postal address elements. If you need to separate postal address elements using some special character (e.g. a comma), you can type this delimiter in the **Address Fields Delimiter** field.

## Additional options

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

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

If you have ExactSpent installed, the **Enable ExactSpent feedback** option will allow you to set the degree of <u>integration</u> with ExactSpent. If enabled TO3000 will both send Job data to ExactSpent and receive it. If disabled TO3000 will send Job data, but not receive any feedback.

## 3.3.2. Workflow Modes

*The Workflow Modes* menu is used to choose the workflow mode used in TO3000 3D+. 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 creating a project.

Select the mode you want to use and click Set Now.

🧔 General		
🖳 Workflow Mode	Choose Mode:	
Codes	With Projects Mode	Cat Now
Salutations Caracteriables Caracter	O Without Projects Mode	Set Now
Reports	Description:	
CATCount	Three-level structure: Client-Project-Client Job. Each Client has Projects assigned to it. A number of Client Jobs will be attached to each Project. Client Jobs cannot be created directly, users must first generate a Project.	

## 3.3.3. Folders

The location of *Business folder* as well as automatic folder creation options can be changed via the **Folders** section of the **Advanced Settings** window.

To change the location of Business folder:

- 1. Go to **Backstage > Advanced Settings**.
- 2. Click the Folders section.
- 3. Click the **Change** button.

🧔 General 🖳 Workflow Mode	General	Client Folder	Project Folder
E Folders	Location	of TO3000 Busi	ness Folder:
Salutations Template variables	<u>C</u> han	ge <b>D:\Busi</b>	ness\

### Additional folder settings

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

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

**NOTE:** This will only affect the folders created after the change. Existing folders will not be altered.

🧔 General 🖫 Workflow Mode	General Client Folder Project Folder	
<ul> <li>Workflow Mode</li> <li>Folders</li> <li>Folders</li> <li>Codes</li> <li>Salutations</li> <li>Template variables</li> <li>Queries</li> <li>Fields</li> <li>Reports</li> <li>CATCount</li> </ul>	Automatic Folder Creation:	Add Folder Add SubFolder Edit Delete Folder
	Project Folders names consist of:	
	☑ Project Code ☑ Project Name	Update Folders

The **Project** folder tab has an additional option - set whether Project names are included in the names of individual project folders. Click **Update Folders** to immediately rename all existing project folders.

# 3.3.4. Codes

In TO3000 3D+ "global" codes are used to identify *projects*, *clients*, and *invoices*. These codes are generated automatically each time a new project, client or invoice is created, and cannot be edited by users.

<ul> <li>General</li> <li>Workflow Mode</li> <li>Folders</li> <li>Codes</li> <li>Salutations</li> <li>Template variables</li> </ul>	Next Codes:	Next Project Next Global	Code: 61 Invoice Code: 71	
🖷 Queries	Global Invoice Cod	es:		
🖏 Fields 🗐 Reports	Prefix:		Suffix:	
/ CATCount	ACME-I	e.g. AIT-I-	/ / / / / / / / / / / / / / / / / / / /	e.g. /YYYY
	🗌 Enable annua	l numbering r	resets:	Davi
	Numberin	g reset date:		
	Codes in naming of Invoices for Clie Client-Specific	.RTF files	•	

#### Setting Next Codes

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

**NOTE:** The next code cannot be less than the last code of this type in the database. Thus if you already have a project with code 010, the 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 a prefix or suffix to invoice codes, type it into the Prefix or Suffix fields directly. If you wish to add a date or year as a prefix, use the common Windows date codes to specify the format in which the date must be added to the global invoice code:

#### Example:

YYYY - will display a four digit year, while YY will display two digit year;

MM - will display the month number;

DD - will add the date to the template.

Regulations in some countries may require resetting invoice counters each year. TO3000 3D+ can be configured to start invoice counting anew each year, starting with the first invoice issued in a new year. Select the **Enable annual numbering resets** checkbox to enable annual invoice code resets and adjust the reset date if needed.

**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 3D+ in your Business folder. Either the Client–Specific or Global code can be used.

# 3.3.5. Salutations

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

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

General			New	E	<u>E</u> dit	D	elete
<ul> <li>Folders</li> <li>Codes</li> <li>Salutations</li> <li>Tomplate variables</li> </ul>		* ? I	Salutation Click here Frau	n e to de	Gende efine a filt Fe	er er emale	
Queries	Edit Salutation					7	x
🖏 Fields 🔳 Reports	Salutation:						
<pre>ℓ CATCount</pre>	Frau						
	Gender:						
	Female		-				
	Male Female Undefined						
			C	ЭK		Cance	el

To edit salutations:

- 1. Go to **Backstage > Advanced Settings**.
- 2. Click the Salutations section and click New, or select a salutation and click Edit..

3. Enter the salutation and select the associated gender (Male, Female or Undefined), then click OK.

#### 3.3.6. Template Varaiables

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

#### **Example:**

If you enter EMAIL as the name of q variable and <u>info@marsonlymars.com</u> as the content, you will be able to use the \EMAIL\ variable inside all your .rtf templates. When a document is generated from a template, all variable names will be replaced with their contents.

🧔 General 🖳 Workflow Mode	New Edit Delete	
Folders	* Variable Name	
🕡 Codes	Click here to define a filter	
Salutations		
🖶 Template variables		
👒 Queries	I CORPADDRESS	
🖏 Fields	Edit Variable	? X
Reports	Mame:	
🦸 CATCount	VCORPADDRESS V	
	Content:	
	Galatea, 610, Madrid, Spain, 28042	
	this example custom variable - \CORPADDRESS\ is global and can be used in any .RTF-report throughout Projetex	Ť
	OK Can	cel
	Galatea, 610, Madrid, Spain, 28042	
	this example custom variable - \CORPADDRESS\ is global and can be use	d in any

To edit custom variables:

- 1. Go to **Backstage > Advanced Settings**.
- 2. Click the Custom Variables section.

Variable contents can be edited either in the Edit Variable window, or directly under the variables list, where the contents of the selected variable are displayed,

## 3.3.7. Queries

SQL-versed users can extract any data directly from the TO3000 3D+ 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. Go to Backstage > Advanced Settings.
- 2. Click the **Queries** section.

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

General	* Name	New
Workflow Mode	Client Jobs	Edit
Codes	Client Jobs (with Model)	Ean
Salutations	Clients - Invoices	<u>D</u> elete
Template variables	Clients - Invoices (with Model)	
🖷 Queries	Clients - Payments	Export Data
🖏 Fields	Clients - Prices	Print Data
Reports	Clients with custom fields (with Model)	Enine Data
🚺 CATCount	Custom Queries (with Model)	
	Custom Reports (with Model)	Load
	Projects (with Model)	Save
	Projects2 (with Model)	
Ç.	K4 ≪4 4 1 of 11 <b>▶ )&gt; ))) #2</b>	
	Description:	
	Client Jobs Query, Uses links with Invoices, Projects, Services, Units, Currencies, Clients, Project Managers tables.	

## 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 the currently selected query and prompt you to select the format of the output file.

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

#### Loading and saving queries

Queries can be saved to and loaded from special .px15 files.

To save a query in a .px15 file, select it and click the **Save** button. Enter name of the file and click **Save** button.

To load a query from a .px15 file, click the **Load** button and use the **Open TO3000 3D+ Query** window to locate the required px15 file.

## 3.3.8. Fields

TO3000 3D+ supports database structure customization in the form of adding custom fields to certain tables in the database. Custom fields can be added via the **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. Go to Backstage > Advanced Settings.

2. Click the Fields section.

The following windows contain Custom fields tabs:

1. Clients:

- The Main tab of the Client/Prospect window (Next to Client/Prospect profile)
- Quotes to Clients/Prospects (New/Edit quote window)
- Client/Prospect Jobs (New/Edit job window)
- Invoices to Clients/Prospects (New/Edit invoice window)
- Business Expenses (New/Edit expense window)

2. The Main tab of the Project window (Next to Project profile)

## Creating groups of custom fields

- 1. Select the table to which a new custom field must be added by selecting the corresponding tab.
- 2. Click the **New** button from the left-hand column of 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 a 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 within the **Custom Fields tab**, use **Move Up/Move Down** buttons.

Morttow Mode		nts Project	s							
Bolders	Mai	in Quotes	Jobs	Invoices						
Codes Salutations	Ð	Drag a colu	umn hea	ader here to grou		Change Group	Fix So	rting		
Template variables	V	* Group of	fields	-		Confirm Changes	Can	cel		
His Queries	×	Common				)rag a column header here to				Ð
Reports		lest			*	Field Name		Field type		
					•	First contact:			Date	×
						Active Client			Checkbox	
	×					Specialization			String	
						Referral			String	
						Special terms			String	æ

#### Creating custom fields

- 1. Select the necessary Group of fields (if you have created more than one).
- 2. Click the **New** button from the right-hand column 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.

**NOTE:** To create a drop-down list, select the String data type, check the "Has fixed set of values" check box and enter all the possible values.

•(optional) 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. <u>See also: Templates</u>

•Click OK to add the specified Custom Field or click Cancel to discard.

Edit Custom Field		? X	
Edit Custom Field ■ has fixed Education Electronics IT/Compute Law/juridica	Name: Specialization Type: String Variable: CLIENT_SPECIALIZATION d list of values: Prs	· ×	<ul> <li>G₀</li> <li>✓</li> <li>✓</li> <li>✓</li> <li>✓</li> </ul>
Marketing Medicine/P Oil and gas Telecommu	harmacy nications	el	

To move a **Custom Field** to another **Group of fields**, i.e. another tab, click the **Change Group** button, and select the target group in the window that opens.

To confirm all changes you have made, click the **Confirm Changes** button.

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

The new custom fields appear on the Custom Fields tab of the respective TO3000 3D+ windows.

### 3.3.9. Reports

Custom reports can be created edited and deleted from the Advanced settings window.

To manage custom reports:

- 1. Go to Backstage > Advanced Settings;
- 2. Click the **Reports** section to open *custom report* management options.

🧑 General	* Name	Compatibility	New
Workflow Mode	Accounting-All Sales Table Monthly	3D 🥝	Edit
Codes	Accounting-Customer Ledger	3D 🥝	Edit
Salutations	Accounting-Income and Expense Report	3D 🤡	<u>D</u> elete
🗄 Template variables	Accounting-Income and Expense Report 2	3D 🤡	Edi <u>t</u> Details
😼 Queries	Accounting-Income Report	3D 🥑 🖉	
😺 Fields	All Sales Chart-Based on Invoices	3D 🥑	
Reports	All Sales Chart-Based on Invoices (selected period)	3D 🧭	
CATCount	All Sales Chart-Based on Payments	3D 🥝	Preview
	All Sales Chart-Based on Payments (selected period)	3D 🥝	Load
	All Sales Chart-Client Jobs	3D 🤡	2000
	All Sales Chart-Invoices	3D 🤡	Save
	All Sales Chart-Invoices 2	3D 🤡	

### Custom report options

The following options are available for custom reports:

- The New\Edit\Delete buttons can be used to create\modify\delete the selected report.
- The Edit Details button provides access to the Edit Custom Report window where you can change the report's name and description. The names of fixed reports (bundled with the program) can not be changed
- The **Preview** button opens the **Preview** window where you can see how the selected report would look on paper and print it if needed.
- The **Load** and **Save** buttons will allow you to download new reports from .PX15 report files (*importing*) and save the existing reports to .PX15 files for (*exporting*).

**NOTE:** Custom reports which are displayed in **Custom Reports** section of TO3000 3D+ **Advanced settings** window, are the ones currently integrated into TO3000 3D+ database. *PX15* files are used solely for export-import purposes, thus deleting a *PX15* file from *C:\Users\Public\Documents\AIT\TO3000, Version 3D\Reports\* will not delete any of the reports in database.

**NOTE:** The Compatibility column displays which versions of TO300 the selected report is compatible with. This allows you to quickly see if you need to update your custom reports after upgrading the program to the newest version.

#### Exporting a custom report

To *export a custom report*, save the required report in a .PX15 file. This file can later be imported into another TO3000 3D+ database.

- 1. Select the required *custom report* in the list.
- 2. Click the Save button.
- 3. Specify the name and location for PX15 file being saved.

#### Importing a custom report

You can import a custom report to your database from a PX15 file.

To import a custom report, use a PX15 file to load required report.

1. Save the *PX15* file being imported to the *C:\Users\Public\Documents\AIT\TO3000*, Version 3D\Reports folder.

2. Click the Load button.

3. Locate the *PX15* file being imported, select it and click the **Open** button.

#### Editing a custom report

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

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

For detailed information, please visit the Fast Report Inc. Internet site: http://www.fast-report.com

# 3.3.10. CATCount

This area contains settings for the CATCount tool, used to calculate volumes of computer-assisted translation.

🧔 General		Change Unit 🗙
🖳 Workflow Mode	🗹 Enabled	
🗁 Folders	CATCount Unit:	Drag a column header here to group by that column
🗊 Codes		
🦻 Salutations	Change words	* Units
🖶 Template variables		• words
😼 Queries		
🖏 Fields		
Reports		
🚺 CATCount		
		₩ ≪ < 1 of 1 > >> >> 2 < < >>
		Only word-based units available.
		Note: Use Corporate settings to add custom volume units
		here.
		OK Cancel

Select the **Enabled** check box to enable **CATCount** in TO3000.

Click the **Change** button and select the word-count units in which CATCount must provide its counts. CATCount supports only word-based units.

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

**Note:** Units displayed in this list can be edited in the **Volume Units** area of the **Business Settings** tab in the **Backstage** view.

# 3.4. Database settings

**Database settings** window is used to perform maintenance operations over TO3000 3D+ database.

**TO3000 Database** string displays full path to TO3000 3D+ database file, which is normally located at C:\Users\Public\Documents\AIT\TO3000, Version 3D\db\TO30003D.ndf

**Database Version** string displays the version of TO3000 3D+ 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.

**The Database settings** window is used to perform maintenance operations on the TO3000 3D+ database.

User Settings	Database file:						
Business Settings	C:\Users\Public\Documents\AIT\TO3000, Version 3D\db\TO30003D.mdf						
	Database Version:						
Advanced Settings	3D.183.0						
Databasa	🔛 Backup 🕞 Set Database Folder						
Settings	🕞 Run Update Script 🛛 🚯 Transfer Database Files						
Help	Restore						

#### 3.4.1. Backup

It is recommended to perform regular backups of the TO3000 3D+ database. You can perform a backup of the database at any time by clicking the **Backup** button on the **Database Settings** window of TO3000 3D+.

Database Settings	🖾 Backup			
Backup Database				x
Database: C:\Users\Public\ Backup Path:	\Documents\AIT\TO3000, Version 3D\	db\		
C:\Users\Public	\Documents\AIT\TO3000, Version 3D\	Backups\		
Backup File: TO3000 3D 2017	'.04.13 16-55-49.bak			Select
			ОК	Cancel

To perform a *backup* operation:

- 1. Go to Backstage > Database Settings, and click the Backup button;
- 2. Specify the location of the backup file by clicking **Select** button;
- 3. Enter backup file name in the Backup File field;
- 4. Click **OK** button to begin backup operation.

#### 3.4.2. Run Update Script

In some cases, when you update your TO3000 3D+, the database needs to be updated as well. Usually the database version is automatically updated while updating TO3000 3D+, however there may be exceptions. In this case the database can still be updated manually by running a *database update script*.

Update scripts are always installed together with TO3000 3D+ and can be found in the \AIT\Translation Office 3000 Version 3D\Admin\DBUpdates folder in the form of *.PTU* files.

To update the database using a database update script:

- 1. Go to Backstage > Database Settings;
- 2. Click the Run Update Script button from the Database Settings window.

3. Locate the script which updates your current database version to next version and select it. Repeat update operation until you have most current database version.

**Example:** The installed database version is 10.59.0 and the software update requires the 10.61.0 database version. In this case you need to consecutively run two updates (first *dbx59to60.ptu* and then *dbx60to61.ptu*).

**NOTE:** TO3000 3D+ performs a mandatory backup before each database update operation, for maximum security of data in case anything goes wrong during the update.

## 3.4.3. Restore

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

Database Settings		Backup								
Help		🕞 Run Update Script								
🕑 E <u>x</u> it		Restore								
Restore Datab	oase				x					
	Restore fron C:\Users\Put	n: blic\Documents\AIT\TO3000, Version	3D\Backups\		Select					
	To Database: C:\Users\Public\Documents\AIT\TO3000, Version 3D\db\									
				ОК	Cancel					

To restore your database from a backup file:

1. Click Database Settings in the Backstage view;

2. Click the **Restore** button on the **Database Settings** window of TO3000 3D+.

3. Click the Select button in the Restore Database dialog and locate required backup .BAK file (by default these files are stored in *C:\Users\Public\Documents\AIT\TO3000, Version 3D\Backups\*) and click OK to begin the restore operation.

**NOTE:** It is good practice to backup a database or copy it to another location before running the **Restore** function.

## 3.4.4. Set Database Folder

The **Set Database Folder** command is used to switch to a different location with the database files.

It can be used to, for example connect to a database that is synchronised with cloud storage, or to switch between multiple databases on the same machine.

Database file:	Select Database Folder	? X
C:\Users\Public\Documents\AIT\TO3000, Version 3D\db\TO30003D.mdf	Current path to TO3000 database:	
Database Version: 3D.183.0	C:\Users\Public\Documents\AIT\TO3000, Version 3D\db\ Destination path to TO3000 database:	
Backup     Run Update Script     Restore	C:(Users)Public\Documents\  C:(Users)Public\Documents\  C:(Users)Public\Documents\  C:(Users)Crinsetia My3ика  C:(Disetia My3ика  C:(Disetia JackyMetru)  C:(Disetia JackyMet	Default
		Close

To point the program to a different database location:

1. Click Database Settings in the Backstage view;

2. Click the Set Database Folder button on the Database Settings window of TO3000 3D+.

3. Navigate the folder tree to the location of the database and click the **Set Database Folder** button under it.

The window will inform you if the currently selected folder contains the required files. Click the **Default** button to return to the default database location.

## 3.4.5. Transfer Database Files

The **Transfer Database Files** command is used to move the database to a different location on your machine.

It can be used to, for example, put the database in a cloud-synced folder, so you could access it from multiple machines by installing TO3000 there and using the <u>Set Database Folder</u> command to point it to the cloud folder.



To move your database to a different location:

- 1. Click Database Settings in the Backstage view;
- 2. Click the Transfer Database Files button on the Database Settings window of TO3000 3D+.

3. Navigate the folder tree to the desired location for the database and click **Transfer database** to the new location .

The window will inform you if the currently selected folder is eligible for transfer. Click the **Default** button to return to the default database location.

# 4. Dashboard

The **Dashboard** displays basic information about the state of Client Jobs, Invoices, and Projects in the form of a series of widgets.

		Dashboard	ł						
			<b></b>					C	X
Open	No	ot Invoiced Total	Volume Last Month	Volume This Month	Due Date This Week	Due Date In Next 2 Weeks	Due Date This Month	Due D Next 3	ate In 0 Days
Dashboard	t t								
Ę	2	Client J Volun Count: Volume	Jobs: ne Last Mor 0 e: UnitRatio	nth problems		Client Jobs: Due Date T Count: 0 Volume: Unit	his Week tRatio probl	ems	<u></u>
K	Client Jobs: Not Invoiced Total Count: 23 Total: EUR 24634.99			4	Invoices: Due Date T Count: 0	his Week			

To open a widget, click the corresponding icon in the **Dashboard** Ribbon. If that widget is already open, it will be highlighted instead.

Left-clicking a widget will transport you to the corresponding table and automatically apply the required filters.

To close a widget or group of widgets, right-click each widget you want to close and click "**Remove Widget**".



# 4.1. Moving and Grouping widgets

Click and drag a widget to move it relative to other widgets. A "shadow" will indicate where the widget will go when dropped.



To move several widgets at once, right-click each, then click and drag one of the selected widgets.

To create a new group of widgets, drag a widget towards the right side of the screen or in between existing groups. A thin vertical "shadow" indicates that the widget will create a new group when dropped.



Groups are separated by a wider gutter than widgets within a group. To move a group as a whole, click and drag the gutter between its widgets.



Dashboard	98	
-----------	----	--

If the number of groups exceeds the width of the screen, you can scroll the screen by clicking the arrows that appear when you move your mouse to the left or right edge of the window, or by clicking and dragging the gutter between groups.



# 4.2. Naming groups

Every time you create a new group of Widgets, you can edit the names of both the new group and all groups that currently exist.



You can also rename groups at any time, by right-clicking anywhere in the dashboard and clicking the **Rename Group** button at the bottom of the window.



# 5. Workspace: Clients

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# 5.1. Client window

**The 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 the Client window click the Client shortcut from the Clients tab of the Ribbon.

#### **Client Window tabs**

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

	Prosp	oects Cl	ients Pr	ojects										٩
					Æ									
Client			Client John						Duri					
Client	Prices	Quotes	Client Jobs	Invoices	Credit N	lotes Payme	ents Refur	ids Client Acco	ounts Busir	iess Expens	es			
Future Un	Future Unified Resources •													
Main	Contacts	Marketing	) Prices	Quotes	Projects	Client Jobs	Invoices	Credit Notes	Payments	Refunds	Account	Files	Info	Calendar

- The Main tab contains the profiles of your clients. Client records can be created and edited here.
- The <u>Contacts</u> tab lists the contacts of the selected client. New client contacts can be added here.
- The Marketing tab contains marketing information for the selected client
- The <u>Prices</u> tab holds the individual price list of the selected client. Here this client's prices can be created and edited.
- The <u>Quotes</u> tab is used for issuing and managing quotes offered to the selected client.
- The <u>Projects and Client Jobs</u> tabs these tabs contain the projects and client jobs of the selected client.
- The <u>Invoices</u> and <u>Payments</u> tabs these tabs hold all the invoices issued to and payments made by the selected client. Here invoices are created, and linked with payments.
- The <u>Credit Notes</u> and <u>Refunds</u> tabs these tabs contain all credit notes received from and refunds issued to the selected client.
- The <u>Account</u> tab provides the most basic overview of the selected client's financial accounts.
- The Files tab this tab is used for accessing the selected client's files and folders.
- The <u>Info</u> tab is used for adding various client-related notes.
- The <u>Calendar</u> tab displays the schematic calendars of the selected client's projects.

## 5.1.1. Main tab:

## **Browsing clients**

You can search for specific clients using the <u>Find panel</u>. Enter a few characters from the client's name, or any other column displayed in the table, and the table will show only the entries that contain the entered characters.

Click on any client in the list to view and edit the client's profile to the right.

Once a new client has been added, their data can be edited in this profile.

You can create a new client record based on the data (profile, marketing, contact or pricing) of one of the existing clients by cloning this client. To do so, select a client to clone, click the **More...** button next to the **Delete** button, and select "**Clone**"

If you no longer actively work with a particular client, you can change them into a Prospect. Click the **More...** button and select "**Move to prospects**".

You can delete a client and all data related to this client (quotes, projects, jobs, invoices, etc.). To do so, select a client to delete, and click the **Delete** button.

Each client entry can have a flag assigned to it. The client's flag can be changed by right-clicking their entry and selecting a flag.

Clients are listed in the form of a table. You can change the columns displayed in the table by using the <u>Customize Columns</u> option.

**NOTE:** Due to filter operation (like the *local custom filter* and *global date filter*) you may not be able to see all the clients in the database. Please refer to <u>Local Custom Filter</u> 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 Fields**, which enable you to review and modify the client's information. Click the appropriate button to add or edit client profile information:

•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. You can also load the client's logo here. It will be displayed above their country's flag.

•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 the postal address of the client. See the <u>Postal Address of Client</u> topic for details.

•Contact Info — allows you to add or change the contact information of the client. See the <u>General Contact Information</u> topic for more details.

•Web — opens the Edit Web Links dialog box, providing fields to enter your client's web site address (URL), as well as their LinkedIn, Facebook, and Twitter accounts. Click the address or the social media icons to open the corresponding links in your Internet browser.

•Payment Terms — allows you to specify the payment terms for each client, and their minimum fees. According to these TO3000 3D+ will determine if your invoices to the client are outstanding, overdue or will be due soon. See the <u>Payment Terms of Client</u> topic for more details.

• VAT Number — enter the client's legal tax number to have it automatically displayed and printed on invoices.

•Client Folder — this part of the client's profile can be used to quickly create the client's folder and access client files. Click the Folder button on the right of the field to open the folder in TO3000 Explorer (creating it if it does not exist yet).

•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 the 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 3D+ will use the codes for the next quote, client job, invoice and payment you create. You can only increase the next code value. See the <u>Next Client</u> <u>Codes</u> 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 the Locale Format of Client topic for more details.

•Invoicing Policy — by adjusting the invoicing policy you determine the conditions upon which TO3000 3D+ will prompt you to invoice client jobs. See the <u>Invoicing Policy of Client</u> 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 — here you can set the parameters for access to the client's FTP folders. Shortcuts to these folders will be automatically added to the **Files** tab of this client's window. See the <u>Client FTP Connections</u> topic for details.

#### Custom data

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

#### Postal address of client

The Client's postal address 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 the 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 the <u>Countries</u> topic for details.

**ZIP Code** — maximum 10 characters long.

**Time Zone** — The clients's time zone is set automatically when you select their country, but you can change the time zone manually as well.

New Client Delete			Profile	Custom Fields			
Enter tout to second	Tin d			Code:		LIGRA	
Enter text to search	• Find	Clear		Name:		The Lightning Graphics	
* Name		Currency	P	ostal Address:		55 Hampton Park Blvd.	
Edit Postal Address				3	×	Capital Heights Time Zone Settings	x
Street Address:	55 Hampton P	ark Blvd.				Set the Time Zone:	7
City:	Capital Height	5				Time Zone:	
State:	MD					(UTC-05:00) Eastern Time (US & Canada)	-
Country:	United States			•			
ZIP Code:	20743					Current date and time:	
						14.04.2017 04:11	
Local Time:	14.04.2017 04	:11					
Time Zone:	(UTC-05:00) Ea	stern Time (US _C	anada)				
4						OK Canc	el
			OK	Cancel		nehase	

### **General contact information**

Clients in TO3000 3D+ have two types of contact information: general, and the contact information of the client's contact persons (<u>Contacts of Client</u>). A client's general contact information can contain the following data:

**E-mail** (up to 2) — maximum 250 characters. The **Send** button becomes active only if a 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.

A client's general contact information can also be added to templates with the help of <u>Client</u> <u>Information Variables</u>.

Profile Custom Fields		
Contact Info:	E-mail: mail@lightning-graphics.com	
Edit Contact Info		×
	The Lightning Graphics	
E-mail:	mail@lightning-graphics.com	Send
E-mail 2:		Send
Phone:		
Phone 2:		
Phone 3:		
Phone 4:		
Fax:		
Notes:		*
		<b>~</b>
	ОК	Cancel

### Payment terms of client

According to the payment terms of a client, TO3000 3D+ will keep track of unpaid invoices and update the status of outstanding invoices: overdue, due today, due tomorrow, and so on.

With the help of the **Edit Payment Terms** dialog you can configure the payment conditions of the 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 the minimum fee condition.

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

Select Unknown/Other to disable automatic payment terms control.

Profile	Custom I	Fields	<u></u>	mignism	ig grapme			
Payment Terms: On day 10 of the next month (from Invoice date)								
lit Payment Terms								
	Betwee	en: Unr nd: The	eqiste Light	red ning Gra	phics			
		Minimu	m Fee:	700	\$ (0 -	No Mini	imum Fee	)
0	Within	30	• da	ys				
0	On day	10	of the	e same m	onth			
٢	On day	10	of the	e next mo	nth			
0	On day	10	of the	e month fo	ollowing n	ext		
0	Unknown/	Other						
Additio	nal Notes:							
						0	к	Cancel

#### **Next client codes**

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

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

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

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

Profile Custom Fields						
FT	P connections		Nex	d Co	des	
Next C	odes for Client					x
Clier	nt Job:		J-LIGRA	3		\$
Invoi	ice:		I-LIGRA	4		+
Payn	nent:		P-LIGRA	5		\$
Quo	te:		Q-LIGRA	3		•
			OK		Cance	<u>؛ا</u>

## Locale format of client

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

To have invoices to clients printed according to their own *Regional and Language options* (normally defined in the *Windows Control Panel*), TO3000 3D+ can use separate locale formats 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 a negative amount is indicated with a "minus" put before number: -100.00. In other countries a negative amount must be written in parentheses: (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 3D+ 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 the number of digits after decimal is set to 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* the digit grouping symbol is a whitespace.

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

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

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

**NOTE:** To display an abbreviated day or month name ("*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 the short date format by typing 3 or 4 characters in the **Short Date Format** field.

To configure the locale settings for a certain client, click the **Locale Format** button in this <u>Client's</u> <u>profile</u>.

Profile Custom Fields						
FTP connections	Next Codes	Next Codes Locale Format				
Locale of The Lightning Graphics				X		
Generation of RTI	F files: Custom Values Default Locale Custom Values	5		<b></b>		
Negative Currency F	Format: -1,1 •	Samp	les:			
Decimal S	Symbol: , 🔹	Positive Number:	123 456 789,00			
No. of digits after D	ecimal: 2	Negative Number:	-123 456 789,00			
Digit Grouping S	Symbol: 🔹	Short Date:	14.04.2017			
Date Sep	parator: . 🔻	Long Date:	14 квітня 2017 р.			
Short Date F	Format: dd/MM/yyyy	•				
Long Date F	Format: d MMMM yyyy	y' p.' 🔹				
			ОК	Cancel		

#### Invoicing policy of client

Invoicing policy settings determine when TO3000 3D+ alerts user to invoice a client's jobs. According to these settings TO3000 3D+ will assign one of the following statuses to a client's uninvoiced client jobs as a whole: **Not ready for invoicing** or **Ready for invoicing**, followed by a comment, depending on the current *Invoicing policy settings*, for example, "**Total reached**".

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

**	•	9 o	f 12	• •	₩	æ	•
Ready	for	invoicing: To	tal reached				
Da	sh	board	Works	pac	е	Calen	dar

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

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

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

To configure your invoicing policy regarding a certain client, click the **Invoicing Policy** button in this <u>Client's profile</u>.

Profile Custom Fields	
Invoicing Policy:	After total of USD700: 10 days maximum
Edit Invoicing Policy	x
Between: U	Inregistered
and: T	he Lightning Graphics
Invoice Client Jobs	
O Immediately after com	pleting job
Only after total of invo	iced jobs reaches
700,00	
☑ Wait accrual no	longer than
10	days
	Client Currency: USD
	OK Cancel

**NOTE:** If the Invoicing policy is set to **Immediately after completing job**, then **Not ready for invoicing** or **Ready for invoicing** messages will not be displayed.
### **Client FTP connections**

*FTP (File Transfer Protocol)* is a common method of sharing and exchanging work files. Each client profile in TO3000 3D+ can have a number of FTP connections (addresses of shared folders) associated with this client. These folders can then be quickly accessed by any user working with the <u>Files tab of this Client</u>.

The *FTP Connection* interface in TO3000 3D+ allows for quick access to the specified FTP folder without having to re-type the login and password each time you connect. The following details can be specified when creating a connection:

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

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

**User Name** — a login, normally issued by the FTP server administrator. This login will be used when TO3000 3D+ attempts to connect to FTP. Can be no longer than 50 characters.

Password — this password will be used when TO3000 3D+ attempts to connect to FTP.

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

Enable **FTP over SSL/TLS** if the connection supports encryption. Consult your FTP server administrator as to whether you should use this option.

The **Keep connection alive** option sets whether TO3000 should continue trying to connect to a non-responding FTP address. If this option is enabled, you can also set the interval between connection attempts.

To add, edit or delete the FTP connections of a certain client, click the **FTP Connections** button in this <u>Client's profile</u>.

Profile	Custom Fields	]			,
FT	P connections	1	Next Codes		Locale Form
FTP connec	tions of The Light	ning Graphics			X
Availab	le FTP connectio	ns:			
The Lig	htning Graphics				New
Edit FTP Co	nnection			x	Edit
Connecti	on Name:				Delete
The Ligh	tning Graphics				
FTP Serv	er:		Port:		
clients.pr	rojetex.com		:	21	
User Nar lightning	me: _graphics				
Passwore	d:				
•••••	••				
Use p	assive transfer ver SSL/TLS				
с кеер	connection alive	nand NOOD) is	961		
	20	nanu NOOP), S			Close
		ОК	Cancel		

### **Cloning and converting a client**

#### Cloning

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 the clone option to copy selected data from the existing client to a new one.

Main	Contacts	Marketing	Prices	Quotes	Projects	Client Jobs	Invoices	Credit Notes
N	lew Client	<u>D</u> elete	e 🛛 🗖	≣ ▼				
Clon	e Client							x
*		Clone non-Jol of Global Con	b parts cepts Ur	niversal:				
	5	Client Profil	e					
_	5	☑ Marketing ☑ Prices						
и — —								
						ОК		Cancel

The following data can be copied:

**Profile** — although it is unlikely that two different clients will have the 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 the **Client** window) data may save time when creating a client for a new department or subsidiary of an existing client.

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

**Prices** — if a new client has the same or similar prices (**Prices** tab of the **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 the **Client** window, click the **More...** button and select **Clone**. Newly cloned client will appear in the list with the CLONED string added to their name.

#### Converting a client into a prospect

If you no longer actively work with a particular client, you can convert that client into a Prospect.

All the database entries connected to the client and all of the client's files will be moved into the Prospects database.

To convert a client in to a prospect, click the **More...** button and select **Move to Prospects.** 

### 5.1.2. Contacts tab

A 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 the Client PM field).

•Contacts of the client can also be a added to invoices' Attention fields.

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

Here you can create new contacts, as well as edit, delete and clone existing ones.

G	lobal Concepts Unive	ersal: Contact	s <b>*</b>				
1	Main Contacts	Marketing	Prices	Quotes	Projects	Client Jobs	I
	<u>N</u> ew	<u>E</u> dit	<u>D</u> elete		Clone		
*	Position	Salutation		Name		E-mail	
۲	PR	Mrs.	Aki Naka	sawa		pr@global	
	Project Manager	Ms.	Misato S	hinigawa		projects@	
	Sales	Mr.	Naoto Ika	ari		sales@glo	

### 5.1.3. Marketing tab

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

The **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). The **Date** and **Subject** fields of a record cannot be empty. Records in the **Marketing Tracker** can be sorted by **Date** or by **Subject**.

(	Global C	oncepts Univ	versal: Mar	ketin	g •			
	Main	Contacts	Marketi	ng	Prices	Quotes	Projects	Client Jobs
	Notes	Links	Tracker					
	<u>N</u> e	ew Record	<u>E</u>	dit		<u>D</u> elete		
	Drag a	a column he	ader here	e to g	group by	that colur	nn	
	*	Date		Sub	ject			
		15.03.201	16	Gen	neva Mot	or Show, G	Geneva, Swit	tzerland
	•	15 10 201	6	Pari	is Motor	Show Pari	s France	

### 5.1.4. Prices tab

Each client in TO3000 3D+ can have a set of prices individual to them. These prices can be assigned on the **Prices** tab of the **Client** window.

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

You can *print the 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. Click **Send Mail** to open the <u>Mail Sender</u> for the generated price list. Templates used to print price-lists can be configured by clicking **User Settings** in the **Backstage** view and selecting the **Templates** section. Templates for prices are stored in the *C:\Users\Public\Documents\AIT\TO3000*, Version 3D\Templates\CLIENTS\Prices folder.

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

G	ilobal C	oncepts Univ	versal: Prices 🔻						
	Main	Contacts	Marketing	Prices	Quotes	Projects	Client Jobs	Invoic	es Credit Notes
	<u>N</u> e	w	<u>E</u> dit	<u>D</u> elete		Сору	from General	C	lient Currency: JPY
*	•	Group	of Services			Sei	rvice		Units
	Testin	g			Testing of	of Localized	l Software		hours
	Editin	g			Proofrea	ding			hours

### 5.1.5. Quotes tab

*Quotes to client* can be managed on the **Quotes** tab of the **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 3D+, quotes can be saved to a printable file or printed. Please refer to the <u>Creating quotes to clients</u> topic for more details.

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

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

- blue for Unknown
- green for Accepted
- red for Rejected
- purple for Received or Corrected

The status of a quote can be changed in the **Edit Client Quote** window. Please refer to the <u>Creating quotes to clients</u> topic for more details.

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

G	lobal Concepts	Universal: Quotes 🔻	•												
	Main Conta	cts Marketing	Prices	Quotes	Projects	Client Jobs	Invoices	Cr	redit Notes	Payments	Refund	s Account	Files Info	Calenda	r
	<u>N</u> ew Quote	<u>E</u> dit	<u>D</u> el	ete	∃ <del>▼</del> St	atus: *All*		_		ent Currency	r: JPY				
*	Code	Na	ame		Clone				Draft Client	Jobs for Q-0	GCU0002				
	Q-GCU0001	Health Care at N	IIST - Pro	gram D	Create P	roject Based on	Quote		Now	Ed	i <del>t</del>	Doloto			
Þ	Q-GCU0002	Security Digital L	ibrary 👘		Global Con	cepts Universa	al 15.0		INCW	Eu	n	Delete			
									Drag a colu						
								1	* Name			Group of Servio	Service		Units
									Security Di	igital Library	а	Translation	French =>	English	words
								410							

### 5.1.6. 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**

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

Gl	obal C	oncepts Univ	versal: Projects	•						
N	∕lain	Contacts	Marketing	Prices	Quotes	Projects	Client Jobs	Invoices	Credit Notes	Payments
	<u>N</u> e	w	<u>E</u> dit	<u>D</u> elete	Sta	atus: *All*				•
*	Proj	ect Code		Projec	t Name		Ass	signed	Deadli	ine
•		0027	Tax policy in	EU			11.11.2	016 12:14	01.02.2017	18:00
		0031	Virtual Reduc	tion Engi	ine		28.09.2	016 12:28	26.02.2017	12:28

### **Project Statuses**

Projects in the list are marked by color depending on their status:

- 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).
- Black the project is *completed*.

**Note:** You can change the colors on the Colors: Status tab of the User Settings menu in the Backstage view.

Also, if a project has any status other than **Normal**, it will be highlighted in a different background color:

- Orange background On Hold status
- Green background Heads-Up status
- Grey background Canceled status

Note: You can change the status of any project with the help of the Special Status dropdown list in the Edit project window.

### Filtering

Use the Status filter drop-down list to display only Projects with a particular status.

### 5.1.7. Client jobs tab

**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 the Status filter drop-down list to display only Jobs with a specific status.

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

If you have set an invoicing policy for this client in this client's profile on the <u>Main tab</u>, TO3000 3D+ will advise you whether the jobs are ready for invoicing or not.

G	lobal Conc	epts Universal: Client Jobs 🔻						
	Main Co	ontacts Marketing Price	s Quotes Proje	ts Client Jobs	Invoices Credit N	otes Payments Ref	unds Account Files	Info Calenda
	<u>E</u> dit	Status: *All*		•	Invoiced: *All*	Client Curren	icy: JPY	
*	Code	Job Name	Assigned	Deadline	Completed	Group of Services	Service	Pricing
J-GCU000: Tax policy in EU translatic 31.12.2016 00:00 01.02.2017 18:00 On Hold Translation English => Swedish per unit								
	J-GCU000	C Virtual Reduction Engine	28.12.2016 00:00	12.01.2017 18:00	12.02.2017 18:00	Editing	Proofreading	per unit

### **Client Job statuses**

Jobs in the list are shown in different colors. These are determined by the current status of each client job:

- Green the client job is not completed yet, but its deadline is in the future.
- Blue the client job is not completed and due today.
- Red the client job is not completed and overdue (its deadline is in the past).
- Black the client job is completed.

**Note:** You can change the colors on the Colors: Status tab of the User Settings menu in the Backstage view.

Also, if a job has any status other than **Normal**, it will be highlighted in a different background color:

- Orange background On Hold status
- Green background Heads-Up status
- Grey background Canceled status

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

### 5.1.8. Invoices tab

*Invoices* in TO3000 3D+ are issued for *client jobs*. One invoice can contain a number of *client jobs* from different *projects*. A job which has been added to an approved *Invoice* cannot be edited.

The **Invoices** tab of the **Client** window is used to issue and keep track of invoices to the currently selected **Client**. All invoices issued to this Client are displayed in the table. To open the **Invoices** tab, open the <u>Client window</u>, select a client and then click the **Invoices** tab.

Global Concepts Universal: Invoices 🝷											
1	Main Contacts Marketir	ng Prices Quo	otes Projects	Client Jobs In	voices Cr	edit Notes	Payments Ref	unds Account	Files Info	Calendar	
	<u>N</u> ew <u>E</u> dit	<u>D</u> elete	<u>V</u> oid	Status: *All*			•	Approved:	All* •	Client Currency: J	РҮ
	Enter text to search		•	Find Clear	-						
*	Client	Code	Global Code	Sent	Currency	Exchange Ra	Invoice Total	Paid	Date Due	Status	Adjustmen
۲	Global Concepts Universal	I-GCU0001	ACME-10048/201	09.08.2016	JPY	0,01	1 366,63	1 366,63	30.08.2016	Settled: 9 days	0,00
	Global Concepts Universal	I-GCU0002	ACME-I0049/201	07.10.2016	JPY	0,01	. 54,00	54,00	30.10.2016	Settled: 18 days	0,00
	Global Concepts Universal	I-GCU0003	ACME-I0069/201	04.02.2017	JPY	0,01	660,00	0,00	09.03.2017	Overdue 36 day	0,00

### **Invoice statuses**

Currently issued invoices can marked in one of the four colors, depending on their status:

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

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

Red – the invoice is outstanding and its payment is overdue.

Black - the invoice has been settled (paid).

Status colors can be customized with the help of **User Settings** in the **Backstage** view. Click the **Colors: Statuses** section of the **User Settings** window.

TO3000 3D+ automatically assigns statuses to invoices depending on the <u>Payment Terms of</u> <u>Client</u>.

### Filtering

To display only invoices with a particular status click the Status filter drop-down list.

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

### 5.1.9. Credit notes tab

The Credit Notes tab of the Client window displays Credit notes for the currently selected client.

The **New** button opens the **New Credit Note** window, where a new credit note can be created. Credit notes must be linked with an invoice when created.

The **Edit** button opens the **Edit Credit Note** window, where the details of the currently selected credit note can be edited.

The **Delete** button deletes the currently selected credit note.

Refunds can later be linked to Credit notes to fully or partially settle them.

Credit notes linked to a Paid invoice or to at least one refund can not be edited.

Т	he Illust	trative Desig	ns: Credit Note	5 🕶								
	Main	Contacts	Marketing	Prices	Quotes	Projects	Client Jobs	Invoices	Credit Notes	Paym	nents R	Refunds
	<u>N</u> e	W	<u>E</u> dit	<u>D</u> elete	St	atus: *All*			•			
*		Code		Client		Sent	Val	ue	Total		Status	5
₽	CN-ILLDES0001 The Illustrative Designs 24.03.2017 300,00 300,00 Partially Paid											

### **Credit Note Statuses**

Credit notes can have one of four statuses:

- Closed the credit note is linked to an invoice with enough unlinked value to cover it completely.
- Awaiting payment the credit note has due balance and has not been linked to a refund.
- Partially paid the credit note has been linked to a refund but still has due balance.
- Fully paid the credit note is linked to an invoice and it's value is fully covered.

#### Filter

Use the **Status** filter drop-down list to display only credit notes with a specific status (Closed, Awaiting Payment, Partially Paid, or Fully Paid).

### 5.1.10. Payments tab

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

Here you can create and manage the payments received from this particular client.

Use the Status filter to show only payments with a particular status.

Payments can be linked to invoices, fully or partially, to settle them. Payments are also added to profit analysis on account tabs.

By default, payments values are displayed in the client's currency. Use the **Customize columns** option to configure which payment data must be displayed.

Tł	he Illus	trative Desig	ns: Payments 🔻	]													
1	Main	Contacts	Marketing	Prices	Quotes	Projects	Client Jol	s Invoices	Crec	dit Notes	Payment	s Ref	unds	Accou	unt Files	Info	o Calendar
	<u>N</u> e	2W	<u>E</u> dit	<u>D</u> elete	Sta	tus: *All*		•									
*			Client			Cod	e	Date Received	d	Total Paid	Li	nked	Currer	ncy E	xchange Ra	te T	otal Paid (EUR)
	The Il	lustrative D	esigns			P-ILLDES00	01	28.04.2016		45	,00	45,00	EUR		1,	00	45,00
	The Il	lustrative D	esigns			P-ILLDES00	02	11.02.2014		1 400	,00	0,00	EUR		1,	00	1 400,00
•	The Il	lustrative D	esigns			P-ILLDES00	03	25.05.2016		170	,00	170,00	EUR		1,	00	170,00
	The Il	lustrative D	esigns			P-ILLDES00	04	25.04.2014		400	,00	400,00	EUR		1,	00	400,00
	The Il	lustrative D	esigns			P-ILLDES00	05	12.09.2016		1 500	,00	500,00	EUR		1,	00	1 500,00

### 5.1.11. Refunds tab

The Refunds tab of the Client window displays the refund records of the currently selected client.

The New button opens the New Refund window, where a new refund can be created.

The **Edit** button **opens the Edit Refund** window, where the details of the currently selected refund can be edited.

The **Delete** button deletes the currently selected refund.

Refunds can be fully or partially linked with credit notes to settle them. Linked refunds can not be edited. Refunds are also added to profit analysis on account tabs.

Client: The Illustrative Designs 💌											
Mai	n Contacts	Marketing	Prices	Quotes	Projects	Client Jobs	Invoices	Credit Notes	Payments	Refunds	
	New	Edit	<u>D</u> elete	Sta	tus: *All*		•				
* Code Client Date Sent Total Paid Linked Currency										Currency	
▶ R-ILLDES0001 The Illustrative Designs 01.03.2017 300,00 150,00								150,00	EUR		

#### Filter

Use the **Status** filter drop-down list to display only refunds which are still to be linked with a credit note, or only those, which have been fully linked.

### 5.1.12. Account tab

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

•Totals of payments, invoices, credit notes, refunds and account balance, as calculated from the previous figures;

•A pie chart showing the share of this client in Gross Revenues.



To open the Account tab, open the <u>Client window</u> and then click the Account tab.

### 5.1.13. Files tab

The **Files** tab of the **Client** window provides you with the ability to create, view and search for files and folders related to the selected client. Folder navigation is described in the <u>File manager</u> topic.

Client files usually consist of invoices, quotes and other documentation.

Digital F	irst Concier <u>o</u>	je: Files										
Main	Contacts	Marketing	Prices	Quotes	Projects	Client Jobs	Invoices	Credit Not	es Payments	Refu	Inds Account	Files
Expl	ore D:\B	usiness\Client	s\DFC\Pa	yments								
1					🚱   🔏	0 🛍 🗶						
🐌 Clie	nts\DFC				Name					Size [	Datetime	
۱ <u>ا</u>	Marketing				P-DFC0	001.rtf			19	KB 1	14.07.2017 16:	29
<u>G</u>	Refresh A	II								Cop	py 🔶 C	ору
		Shortcuts			Explore	D:\Busine	ess\Projects	0021 HIGH	ECHPRO H-210	smart	phone specific	ation
💼 Clie	nt FTP al Folders				<b>()</b>	0 6 ×	:					
Clie	nt Projects				Name					Size (	Datetime	
	-IGHTECHF .ocalizatior	RO H-210 sm of H-210 inst	artphone ruction	specifica	Uncomin Outgoi Work	ng f			22	KB :	14.07.2017 16:	28

### 5.1.14. Info tab

The **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** — new categories of notes can be added by clicking **User Settings** in the **Backstage** view and selecting **Categories**. See the <u>Categories</u> topic for additional details.

**Information** — a plain text note with no maximum length.

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

	The Illus	trative Desigr	ns: Info 🝷												
	Main	Contacts	Marketing	Prices	Quotes	Projects	Client Jobs	Invoices	Credit Notes	Payments	Refunds	Account	Files	Info	Calendar
	<u>N</u> e	ew [	<u>E</u> dit	<u>D</u> elete					Client has been	n known to o	change dea	dlines. Exe	rcise ca	aution.	
ł	*		Subject			•	Category								
	Client	has been k	nown to chan	ige deadl	lines.	Project I	Manager Note								

### 5.1.15. Calendar tab

The **Calendar** tab of the **Client** window displays this client's projects in the visual format of *calendar blocks*. Each block stretches across the calendar from assignment until completion, or until the deadline if the project has not been completed yet.

Double-click any block representing the project to open the Edit Project window for it..

See the <u>Using Calendars</u> topic for more information on calendars.

The Illus	trative Desigr	ns: Calend	lar 👻															
Main	Contacts	Market	ing	Prices	Quotes	Projects	Client J	lobs	Invoices	Credit	Notes	Payments	Refu	nds 4	Account	Files	Info	Calendar
<ul> <li>К</li> </ul>	вітень 2017	p. 🕨	10 к	вітня 20	)17 p.													
<u></u>	всчп	СН	00:00	01:	00 02:00	03:00	04:00	05:0	0 06:00	07:00	08:00	09:00	10:00	11:00	12:00	13:00	) [14:0	0 15:00
27 2	8 29 30 31	1 2																
3 4	4567	89	09:00	0 18:00	Creative E	ngineering												
10 1	1 12 13 14	15 16																
17 1	8 19 20 21	22 23																
24 2	5 26 27 28	29 30																
1 3	2345	67																
Project	Status:																	
*All*		•																

### **Project block colors**

Like the Projects they represent, calendar blocks can have different colors, depending on the statuses of respective projects:

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).

Grey — the project is canceled.

Pale Pink — the project is *completed*.

Pale green — the project is *Heads-Up*.

Pale Orange — the project is On Hold.

### 5.2. Client Prices window

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

Prices can be created and managed here.

**Note:** Any prices added to this list will also appear on the **Prospect Price List**, and vice versa.

		Pros	pects	(	Clients	Pro	jects		
	3				6	7	<u>آ</u>	<b></b>	
	Client	Prices	Quo	otes	Client	Jobs	Invoices	Credit Notes	
C	lients: Pri	ces 🕶							
	<u>N</u> ew		<u>E</u> dit		De	lete			
*	Grou	p of Serv	ices			S	Service		
	Translat	tion		Eng	lish =>	Swedi	sh		
	Translat	tion		Swedish => English					

You can *print your general price list* or save it in a text file by selecting an RTF template and clicking **Save**, **Save and Open** or **Print** buttons at the bottom of the window. Click **Send Mail** to open the Mail Sender for the generated price list.

Templates used to print price-lists can be configured by clicking **User Settings** in the **Backstage** view and selecting the **Templates** section. Templates for prices are stored in the *C:\Users\Public\Documents\AIT\TO3000, Version 3D\Templates\CLIENTS\Prices\* folder.

### 5.3. Client Quotes window

The **Client Quotes** window provides an overview of all quotes, issued to all clients. The options available for this window are the same as those for the <u>Quotes tab of the Client window</u>. 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 a client, open the <u>Main tab of the Client window</u>, select that client, then switch to the <u>Quotes tab of the Client window</u> and create your quote from there.

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

	P	rospects Clients	Projects					
	Client Price	es Quotes Client	Jobs Invoices	С	redit Notes	Payments	Refunds	Client Accounts
C	lients: Quotes 🔻							
	<u>E</u> dit	≡ - Status: *	All*		•			
*	Code	Name	*		Draft Client .	Jobs for Q-E	NISERV00	02
	Q-LIGRA0001	Cras eget mi.			New	Ed	it .	Delete
	Q-DEFDES00(	www.translation3000	.com		TACA.	<u>-</u> u		Delete
	Q-ENISERV00	Field mis-match (Des	cription)		Drag a colur	nn header h	ere to aro	up by that column
	Q-DFC0001	Power Redirection Sy	/stem Guide1		und a cola			up by that column
	Q-DEFDES00	History of Psycholog	у	1	* Name		G	roup of Services
۲	Q-ENISERV00	AcroLexic Dictionary			AcroLexic I	Dictionary tra	anslatior Tr	ranslation
	Q-FUTUN000	Project Management	For Freelance		AcroLexic	proofread	Ed	diting

### **Quote Status**

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

- blue for Unknown
- green for Accepted
- red for Rejected
- purple for Received or Corrected

## 5.4. 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 the **Client Jobs** tab of the **Project** window. The major differences are:

- The **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.

		Prospects C	lients Pro	ojects					🔾 Search
	<b>(</b>		6	<i>(</i>	<u></u>		<b>e</b>		
	Client P	rices Quotes	Client Jobs	Invoices Cre	dit Notes Pay	ments	Refunds Clie	nt Accounts Busines	ss Expenses
C	lients: Client	Jobs 🝷							
	<u>E</u> dit	Status: *A	\ll*		•	Inv	voiced: *All*	•	
*	Code	Job Nam	e	Assigned	Deadline		Completed	Group of Services	Service
	J-TPU0005	IIS server multilin	ngual boc 13	3.01.2017 09:00	25.02.2017 18	3:00 2	25.02.2017 18:00	Editing	Proofreading
	J-TPU0006	IIS server multilin	ngual boc 01	.02.2017 09:00	20.02.2017 18	3:00	- No -	Translation	English = > Finnish

#### Filters

Use the Status filter drop-down list to display only client jobs with a specific status.

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

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

#### **Client Job statuses**

Jobs in the list are shown in different colors. These are determined by the current status of each client job:

- Green the client job is not completed yet, but its deadline is in the future.
- Blue the client job is not completed and due today.
- Red the client job is not completed and overdue (its deadline is in the past).
- Black the client job is *completed*.

**Note:** You can change the colors on the **Colors: Status** tab of the **User Settings** menu in the **Backstage** view.

Also, if a job has any status other than **Normal**, it will be highlighted in a different background color:

- Orange background On Hold status
- Green background Heads-Up status
- Grey background Canceled status

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

### 5.5. Client Invoices window

The **Client Invoices** 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 the total due balance 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 the **Invoices** tab of the **Client** window. The major differences are:

•The 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 a client, open the **Main** tab of the **Client** window, select the required client, click the Invoices tab and create the invoice from there. See the <u>Creating invoices to clients</u> topic for details.

To quickly create a large number of Invoices, click the **Mass Invoicing** button. See the <u>Mass</u> <u>action</u> topic for details.

Use the Status filter drop-down list to display only Invoices with a specific status.

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

		Prosp	pects	Clients P	rojects					Q	Search
	3			6	J	] 🚜		-	Ą		3
	Client	Prices	Quotes	Client Job	s Invoices	Credit No	tes Payments	Refunds	Client Accour	nts Business E	xpenses
						_					
C	Clients: Inv	voices 🔻									
	<u>M</u> as	s Invoicin	9	<u>E</u> dit	S	tatus: *All*			•	Approved:	*All* •
*	÷	Client		Code	e Gl	obal Code	Sent	Currency	Exchange Ra	Invoice Total	Paid
	Wireles	s Adept		I-WIREADO	001 ACM	IE-I0016/201	23.02.2017	CAD	0,63	6 300,00	0,00
	Future U	Jnified Re	sources	I-FUTUN00	01 ACM	E-10019/201	14.09.2016	EUR	1,00	7 344,00	7 344,00

#### **Invoice statuses**

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

Green - the invoice is outstanding and is expected to be paid soon.

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

Red – the invoice is *outstanding* and its *payment is overdue*.

Black - the invoice has been settled (paid).

TO3000 3D+ automatically assigns statuses to Invoices depending on the <u>Payment Terms</u> set for each client.

# 5.6. Client Credit Notes window

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

- The Credit Notes to Clients window displays all credit notes issued to all clients.
- New credit notes cannot be created using this window.
- Existing credit notes cannot be deleted using this window.

Credit notes linked to a Paid invoice or to at least one refund can not be edited.

	Pro	spects	Clients	Pro	jects	
3			6		<u>آ</u>	
Client	Prices	Quotes	5 Client	Jobs	Invoices	Credit Notes
Clients:	Credit Not	es 🔻				
<u>E</u> c	dit	Status: *	All*			•
*	Code		Clier	ıt		Sent
► CN-II	LDES0001	The Illu	strative D	esigns	5	24.03.2017

#### **Credit Note Statuses**

Credit notes can have one of four statuses:

- Closed the credit note is linked to an invoice with enough unlinked value to cover it completely.
- Awaiting payment the credit note has due balance and has not been linked to a refund.
- Partially paid the credit note has been linked to a refund but still has due balance.
- Fully paid the credit note is linked to an invoice and it's value is fully covered

### Filter

Use the **Status** filter drop-down list to display only credit notes with a specific status (Closed, Awaiting Payment, Partially Paid, or Fully Paid).

## 5.7. Client Payments window

The **Client Payments** 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 the <u>Mass action</u> feature.

Use the **Status** filter drop-down list to display only **Payments** which are still to be linked with invoices, or only the fully linked ones.

	Prosp	pects (	Clients Pro	jects			
3			6		<b></b>		E
Client	Prices	Quotes	Client Jobs	Invoices	Credit Notes	Payments	Refunds
Clients: Pa	yments 🔻						
<u>M</u> a	ss Paymer	nts	<u>E</u> dit	Status	: *All*	•	
*		Client			Code	Date R	eceived
The Illu	strative De	esigns		P-	ILLDES0001	28.04	.2016
The Illu	strative De	esigns		P-	ILLDES0002	11.02	.2014

## 5.8. Client Refunds window

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

- The Refunds to Clients window displays all refunds to all clients.
- New refunds cannot be created using this window.
- Existing refunds cannot be deleted using this window.

Refunds can be fully or partially linked with credit notes to settle them. Linked refunds can not be edited. Refunds are also added to company profits analysis on balance tabs.

	Prosp	oects (	Clients Pro	ojects			
			6	<u>آ</u>	<u></u>		
Client	Prices	Quotes	Client Jobs	Invoices	Credit Notes	Payments	Refunds
Clients: Re	funds 🔻						
<u>E</u> dit	St	tatus: *Al	*	•			
* (	Code		Client		Date Sent	Total	Paid
▶ R-ILLDE	S0001	The Illu	strative Desig	jns :	24.03.2017		300,00

### Filter

Use the **Status** filter drop-down list to display only Refunds which are still to be linked with a credit note, or only those which have been fully linked with a credit note.

### 5.9. Client Accounts window

The **Client Accounts** window presents a simplified balance sheet of your Clients based on their payments, invoices, credit notes and refunds. You can use this window to identify which Client's accounts require attention. you can also see your operating profit here, calculated as Total invoices minus business expenses.

Accounts can be viewed both in the Client's currency and in your Base currency: use the **View** drop–down list to select in which currency do you wish to view records. Alternatively, you can use the **Customize columns** option to add columns to the view. The columns containing the base currency's abbreviation display records in your base currency.

	Prospe	cts Client	s Proj	ects							Q	Search
			0							)	<b>1</b>	
Client	Prices (	Quotes Clie	nt Jobs	Invoices	Credit Not	es l	Payments	Refunds	Client Acc	ounts Bu	usiness Ex	(penses
Client Acc	counts 💌											
Tota	l Invoices (A	All Clients):			105 703	.40	Total P	ayments	(All Clients	):	8	0 550,45
Tota	l Payments	(All Clients)	:		80 550,	.45	Busine	ss Expens	es:			6 546,16
Tota	l Credit Not	es (All Clien	ts):		300	.00	Operat	ing Profit	:		7	4 004,29
Tata	I Defunde (/				-	+						
Tota	ii Kerunas (/	All Clients):			500	.00						
Acco	ounts Receiv	able:			25 152	.95						
	Ba	se Currency:	EUR									
		View:	Base Cu	rrency: EUF	R	•						
Drag a c	olumn head	er here to gr	oup by the	at column								
* Client			Currenc	y Invoice	s(EUR)	Cred	lit Notes (E	UR Payme	nts(EUR)	Refunds	(EUR)	Balance(EUR)
Unlimite	ed Concepts	Unified	USD		1 848,00		0	,00	2 156,00		0,00	-308,00
Transla	tion Designs		USD		3 103,10		0	,00	2 695,00		0,00	408,10

**NOTE:** To view the global balance, please select the **Base Currency** option in the **View** dropdown list.

# 5.10. Business Expenses

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

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

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

	Prosp	ects C	lients Pro	jects					🔾 Search
3			6					a <u>t</u> a	
Client	Prices	Quotes	Client Jobs	Invoices	Credit Notes	Payments	Refunds	Client Accounts	Business Expenses
Business E	xpenses 🔻								
<u>N</u> ew		<u>E</u> dit	<u>D</u> elete						
*	Date		Va	lue			Des	cription	
	02.04.201	16		2 300,00	SDL Trados S	tudio 2009 P	rofessiona	l	
	12.05.201	16		10,70	NDA mailing				

The **Custom Fields** tab shows the custom fields for a particular record. New custom fields can be created in the **Custom Fields** section of **Advanced Settings** in TO3000 3D+.

# 5.11. Creating clients

*Clients in TO3000 3D+ are created on the Main tab of the Client window.* To create a Client record, please follow the steps below:

- 1. Click the **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.

•The code for the **Client** record will be generated automatically (usually contains the first letters of the **Name)** in the **Code** text field, but you can also edit it manually (12 symbols maximum).

•Select the **Client Currency** using the corresponding drop-down list.

•Click OK to confirm or Cancel to discard the entered information.

Main	Contacts	Marketing	Prices	Quotes	Projects	Client Jobs	Invoices
N	lew Client	<u>D</u> elete		•			
New	Client						x
*	Name:						
- [	Clark & Part	ners					
-	Code:						
	CLAPAR						
_	Client Currer	ncy:					
	EUR 🔻						
•							
_							
					ОК	Ca	ncel

# 5.12. Creating client jobs (Without Projects Mode only)

Client jobs can be created by clicking the New button of the Client Jobs tab of a client.

Unlimited Concepts Unifie	d: Client Jobs 🔻										
Main Contacts Ma	rketing Prices	Quotes Cli	ent Jobs	Invoices	Credit Notes	Payments	Refunds	Account	Files	Info	Caler
<u>N</u> ew <u>E</u> dit	<u>D</u> elete			Stat	us: *All*			-	Invo	oiced:	*All*
Edit Client Job										?	x
	Client: Unli	mited Conce	ots Unifie	ed			Code	: J-UNL		)4	
Clie	ent PM: Berr	ardo Fernano	lez				Client Ref	f.:			_
							Client PC	D:			
Details Instructions	Work Notes	Custom Fields	Job Fo	lder Aler	ts						
Name:	UCU booklet tran	slation									
Group:	Translation					•					
Service:	English => Swed	ish				•					
Volume:	4000	0 words		•			<u>C</u> ATCount	:	<sup>1</sup> <mark>6 Е</mark> ха	ctSper	nt
Price:	0,1	7 per unit		•	Prices		•	Client	Currency	: USD	
	Total: 6 800,00							1 U	SD = 0,7	7 EUR	1
Job Folder:	D:\Business\Clients	\UNLICON\Jo	bs\0004				<b>&gt;</b>	C	reate Inv	oice	
Timeline	=	Now			=Assigned	I	=De	adline		=Now	
Assigne	ed:		D	eadline:			🗆 Con	npleted:			
13/12/2	2017 09:00		> 10	0/01/2018 1	.8:00 [	•	>				
	(7 days ago)			(in	21 days)						
						Special Stat	us: None				•
RTF Te	mplates: Client Jo	ob - Template	- English	.rtf			•	+	3	2	
							ОК		Ca	ncel	

### **New/Edit Client Job window**

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

**Client Ref.** - the client reference can be a maximum of 20 characters long.

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

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

#### 133 Translation Office 3000 Help

**Group** - the group of services. All services in TO3000 3D+ are broken into groups. You can select any of the groups of services available. To add or edit a group of services please open **Business Settings** in the **Backstage** view, and select the <u>Groups of Services</u> section.

**Service** - each group of services contains a separate list of services. Before selecting a service, select the group of services first. To add or edit a service please open **Business Settings** in the **Backstage** view, and select the <u>Services</u> section.

**Volume** - the job's volume can be indicated in a number of units (characters, words, lines, hours and so on). To add custom units please open **Business Settings** in the **Backstage** view, and select the <u>Volume Units</u> section.

You can also use the 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 the CATCount tool to quickly enter the required volume. See the <u>AnyCount</u> and <u>CATCount</u> topics for details.

If you have ExactSpent installed, you can use it to track the time you spent performing this job, and automatically update this data in TO3000. See the topic <u>Integration with ExactSpent</u> for more details.

**Price** - the price can be entered manually or copied from the client's individual price-list. To copy a price from the price-list click the **Prices** button. The price for a matching service, group of

services and unit combination will be copied. Click the button to copy the current price to this client's price list. You can set a fixed price for the client job (which will not be multiplied by the job volume) by selecting the **flat fee** option in the drop-down list next to the price field. Select the **free** option in the same drop-down list to set the job total to zero. The price and volume in a free job must not necessarily be zero.

If the client currency differs from your base currency, the **Currency Exchange Rate** button will be available. By clicking this button, you may change the *currency exchange rate* used in this *job*. Note that this button does not change the general exchange rate stored in your TO3000 database. To change the exchange rate for all future jobs go to the <u>Exchange Rates</u> tab of the Business Settings.

**Job Folder** - when creating client jobs it is often necessary to work with 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 the **New/Edit Client Job** window.

Create Invoice button - immediately creates an invoice for the job being edited.

**Timeline** - the timeline of a client job in TO3000 3D+ includes assigned and deadline dates, and the date when the client job has been actually completed. The Deadline and Completed values are taken into account when the program determines the status of client jobs (like due today, overdue and so on).

**Special Status** - these are used when the client job needs to be put *on hold*, when you create a *heads-up* (or potential) job or to *cancel* a job. Jobs with *on hold* status have their deadlines undetermined, thus *on hold* jobs cannot become overdue. Jobs with *heads-up* status cannot be set as completed, since *heads-up* status assumes that work has not yet started. *Cancelled* jobs can not be completed either, since the status implies that the job was abandoned.

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

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

**Custom Fields** - client job 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, print it, or send it via Email with the help of the *RTF templates interface*.

Templates for printing job data can be edited with the help of **User Settings** in the **Backstage** view. Click the **Templates** section to quickly access all template folders. Templates for printing client jobs are saved in the C:\Users\Public\Documents\AIT\TO3000, Version 3D\Templates\CLIENTS\Jobs\folder.

# 5.13. Creating contacts

To add or edit a contact person to a client's profile, click the **New/Edit** button on the **Contacts** tab of the **Client** window.

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

**Photo** – up to 110x120 pixels. Click **Load**, **Paste** or **Assign from camera** to add a photo to the contact's profile. Click **Delete** to remove the current photo from the profile.

**Salutation** – select one of the salutations, entered via the <u>Advanced Settings</u> section of TO3000 3D+. This salutation can then be automatically displayed on all printable documents next to this contact's name.

Name – maximum 80 characters.

**Position** – maximum 40 characters. Like the salutation, the position will also be automatically displayed on printable documents.

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

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

**Notes** – a plain text note with no maximum length.

### 5.14. Creating client prices

To add or edit a price, click the **New/Edit** button on the **Prices** tab of the **Client** window to create/edit an individual price, or in the **Prices for Clients** window to create/edit a general price.

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Service:	English => German			•
Units:	words	-	]	
Price:	0,12	(per unit)		
Currency:	EUR 🔻			
			ОК	Cancel

Client price in TO3000 3D+ 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 **Business Settings** in the **Backstage** view, and select the <u>Groups of Services</u> section.

**Service** - each group of services contains a separate list of services. Before selecting a service, select the group of services first. To add or edit a service please open **Business Settings** in the **Backstage** view, and select the <u>Services</u> section.

**Units** - prices in TO3000 3D+ are quoted per certain units. A price can only be applied to a Client Job with its volume in the same units. To add custom units please open **Business Settings** in the **Backstage** view, and select the <u>Volume Units</u> section.

Price (per unit) - Enter the default fee per selected unit.

**Currency** - Select the currency. This option is locked to the Client's currency when creating/editing an individual price. To add currencies to the list please open **Business Settings** in the **Backstage** view, and select the <u>Currencies</u> section. To configure the exchange rate between your base currency and other currencies open **Business Settings** in the **Backstage** view, and select the <u>Exchange Rates</u> section.

# 5.15. Copying client prices from general prices

Prices from the general price list can be copied to an individual client's price list.

Click **Copy Prices** to transfer the currently selected price(s) (use CTRL/SHIFT + left-click to select multiple prices) in the lower list.

If the same price (with the same Service, Group of Services and units) already exists in this client's price list, TO3000 3D+ will prompt you to replace the price in the individual client's price list with the one being copied from the general price list.

## 5.16. Creating quotes to clients

All quote information can be added or changed in the **Edit Quote** window. To open this window for a quote double-click this quote in the list. To create a new quote, click the **New Quote** button.

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**Client PM** - select one of the client's contacts as the project manager for this draft project (on the client's side). Please see the <u>Contacts</u> topic for details.

**Date sent** - apart from reference purposes, this date will also be used by the *Global Date filter*. Please see the <u>Global Date Filter</u> topic for details.

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

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

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

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

**Client Jobs** - lists the draft client jobs of this quote. Use the <u>Customize columns</u> option to configure which data should be displayed. Please see the <u>Draft Client Job</u> topic for more details.

If the client's currency differs from your base currency, the **Currency Exchange Rate** button will be available. By clicking this button, you may change the *currency exchange rate* used in this *quote*. Note that this button does not change the general exchange rate stored in your TO3000 database. To change exchange rate for all future credit notes, go to the Exchange Rates tab of the Business Settings.

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

**Quote folder** - quote folders are created in the Quotes folder located inside each client's folder. The quote code is used in naming the quote folder. Click the Folder button on the right side of the field to open the folder in TO3000 Explorer (creating it if it does not exist yet).

**Draft Timeline** - like a regular project, a 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 the <u>Custom Fields</u> topic.

### Saving / printing / Emailing Client Quotes

You can print quotes or save them in text files by selecting an RTF template and clicking the **Save**, **Save and Open** or **Print** buttons at the bottom of the window. Click **Send Mail** to open the <u>Mail Sender</u> for the generated quote.

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

To edit templates for quotes click User Settings in the Backstage view and select **Templates**. **Templates** for Client Quotes are located in the *C:\Users\Public\Documents\AIT\TO3000* 3D+\Templates\CLIENTS\Quotes\folder.

# 5.17. Draft client Job

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

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A 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 Business Settings in the Backstage view, and select the <u>Groups of Services</u> section.

**Service** - each group of services contains a separate list of services. Before selecting a service, select the group of services first. To add or edit a service please open Business Settings in the Backstage view, and select the <u>Services</u> section.

**Volume** - when entering the volume being quoted, you can either use the volumes specified by the client, or count the client's file with the built-in AnyCount. CAT analysis can also be used to determine the draft job's volume. To count a file, click the **<=AnyCount** button. To enter a CAT analysis or load a Trados or Logoport log, click the **<=CATCount** button. Please refer to the <u>AnyCount</u>, and <u>CATCount</u> 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** - the price value can be either entered manually or copied from the client's individual pricelist. Click the **<=Prices** button to copy the price from client's price list. Click the **=>** button to add this price to the client's price-list.

# 5.18. Creating invoices to clients

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

**Note**: Alternatively, invoices can be created by clicking the **Mass Invoicing** button on the **Invoices to Clients** window. For more information please refer to the <u>Mass Action topic</u>. Invoices for specific jobs can also be created in the **Edit Client Job** window by clicking the **Create Invoice** button.

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#### New/Edit Invoice window

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

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

**Date Sent** - this date is considered to be the invoice's issue date (no matter when the invoice has actually been created) when applying payment terms. See the <u>Payment Terms of Client</u> topic for details.

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

**Global Code** - the global code is generated automatically. The global invoice code's layout can be configured in the <u>Codes</u> section of the **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 the <u>Contacts List</u> topic for details.

**Client Jobs** - lists the client jobs ("items") of this invoice. Use the <u>Customize columns</u> option to configure which data should be displayed.

**Mark as Paid** button - allows you to quickly create a payment according to the total of the invoice and automatically link it up.

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 Business Settings in the Backstage view and select the **Payment Methods** section. See the <u>Payment Methods</u> topic for details on how to add or edit options on this tab.

**Linked with Payments** - unless the full amount of the 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 the **Edit Payment** window only.

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

**Linked Credit Note -** This tab displays information on the credit notes linked to this invoice. Credit notes are linked to invoices during creation.

**Example:** Invoice Total = 1000EUR, it is linked with a Payment on 997EUR. When you click **Add Phantom Payment** you will be prompted 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 with a total equal to the invoice total.

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) percentages to the invoice subtotal. To configure discounts and markups click Business Settings in the **Backstage** view and select the

**Discounts/Markups** section. For more information on adding or editing discounts and markups please see the <u>Discounts/Markups</u> topic.

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

If the client's currency differs from your base currency, the **Currency Exchange Rate** button will be available. By clicking this button, you may change the *currency exchange rate* used in this *invoice*. Note that this button does not change the general exchange rate stored in your TO3000 database. To change exchange rate for all future credit notes, go to the Exchange Rates tab of the Business Settings.

### Saving and printing Invoices

You can print invoices or save them in text files by selecting an RTF template and clicking the **Save**, **Save and Open** or **Print** buttons at the bottom of the window. Click **Send Mail** to open the <u>Mail Sender</u> for the generated invoice.

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

To edit templates for invoices click User Settings in the **Backstage** view and select **Templates**. **Templates** for invoices are located in the C:\Users\Public\Documents\AIT\TO3000, Version 3D\Templates\CLIENTS\Invoices\folder

### 5.18.1. Void invoices

To void an invoice, select it in a client's Invoices tab and click Void.

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

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

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

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

- Discounts
- Taxes
An invoice cannot be voided if it has linked payments. Void invoices are displayed in all invoice lists.

# 5.19. Creating credit notes

New Credit notes are created by pressing the **New** button in the **Credit Notes** tab of the **Client** window. You will be prompted to select an invoice the Credit note will be linked to before the **New Credit Note** window is opened.

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The New/Edit Credit Note window contains the following data:

**Date Sent** — this date is considered the credit note's issue date (no matter when the credit note has actually been created).

**Credit Note Code** — a credit note ID number, generated automatically. "CN" characters mean that this is a credit note, the letters afterwards represent the code of the client and the number is

the value of the credit note counter for this client. Each client has an independent counter for this code.

Linked Invoice Code — the code of the invoice linked to this credit note during creation.

**Value** — the total value of the credit note in the client's currency. TO3000 will calculate the equivalent in your base currency according to the exchange rates.

**Notes** — any additional notes which your credit note must include, can be added on this field. These notes can be automatically added to the printed credit note.

**Tax** — each credit note can have up to 2 taxes. Taxes are applied as percentages to the credit note subtotals. To configure taxes, in the Backstage view click **Business Settings** and select the **Taxes** section.

**NOTE**: After a tax has been selected for a credit note of some client, this tax will be remembered and applied as the default tax for the client. All next credit notes will include this tax. The default tax can be changed in any time by choosing another value during credit note creation.

If the client's currency differs from your base currency, the **Currency Exchange Rate** button will be available. By clicking this button, you may change the *currency exchange rate* used in this *credit note*. Note that this button does not change the general exchange rate stored in your TO3000 database. To change exchange rate for all future credit notes, go to the Exchange Rates tab of the Business Settings.

Linked Invoice — displays the basic information of the invoice linked to this credit note.

**Linked Refunds** — on this tab you can check whether this credit note has been linked with refunds. Refunds can be linked to credit notes from the **Edit Refund** window only.

## Saving / printing / e-mailing Credit Notes

To print, save or e-mail an **Credit Note** as an RTF document, use the RTF template controls near the bottom of the **New/Edit** window.

Use the **RTF Templates** drop-down list to select the template which must be used for printing, saving or e-mailing this credit note as an RTF file. Click the **Save**, **Save & Open**, **Print**, or **Send Mail** button to save, print, or e-mail the **Credit Note**.

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

To edit templates for credit notes, in the **Backstage** view click **Business Settings** and select **Templates**. Templates for credit notes are located in the *C:\Business\CLIENTS\Credit Notes\* folder.

# 5.20. Creating payments

New Payments are created by pressing the New button in the Payments tab of the Client window.

**Note**: Alternatively payments can be created by clicking the **Mass Payment** button on the **Payments to Clients** window. For more information please refer to <u>Mass Action topic</u>. Payments for specific invoices can also be created in the **Edit Invoice** window by clicking the **Mark as paid** button.

Digital First Concierge: Payment	s <b>*</b>							
Main Contacts Marketin	ng Prices Quo	otes Projects	Client Jobs	Invoices	Credit Notes	Payments	Refunds	Accour
<u>N</u> ew <u>E</u> dit	<u>D</u> elete	Status: *All*			Currency: USD			
Edit Payment								x
From:	From: Digital First Concierge Date Received: 16/03/2017							
To: Unregistered Code: P-DFC0002								
Payment Linked with Inv	oices							
ter						Add Phanto	m Invoice	
* Invoice Code	Invoice Date	e Invoid	e Total L	inked with t	his Payment	Balance		Date
₩ 4 4 1 of 1 > >>								۱.
New Link Edit	Delete							
	Linked: 60	0,00				Client C	urrency: US	D
l	Not Linked: <b>0</b> ,	00				1 USE	) = 0,77 EU	R
RTF Tem	plates: Payment	from Client - Te	mplate - Englis	sh.rtf	•	à h+ <mark>6</mark>	; 🗎	
						ОК	Canc	el

Payment from client contains the following data:

**Date Received** - apart from reference purposes, this date will also be used by the *Global Date filter*. Please see the <u>Global Date Filter</u> topic for details.

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

**Volume** - the total amount of the payment in the Client's currency. TO3000 3D+ will calculate your revenues in your base currency according to the exchange rates. See the <u>Exchange Rates</u> topic for details.

**Notes** - any additional information deemed necessary. For example if this is an advance payment for a future project.

If the client's currency differs from your base currency, the **Currency Exchange Rate** button will be available. By clicking this button, you may change the *currency exchange rate* used in this *payment*. Note that this button does not change the general exchange rate stored in your TO3000 database. To change exchange rate for all future credit notes, go to the Exchange Rates tab of the Business Settings.

**Linked with Invoices** - the payment's value can be linked with invoices - fully or partially. The table on the **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 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

You can print payments or save them in text files by selecting an RTF template and clicking the **Save**, **Save and Open** or **Print** buttons at the bottom of the window. Click **Send Mail** to open the <u>Mail Sender</u> for the generated payment.

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

To edit templates for payments click User Settings in the Backstage view and select **Templates**. **Templates** for payments to clients are located in the *C*:\*Users\Public\Documents\AIT\TO3000, Version 3D\Templates\CLIENTS\Payments\* folder.

# 5.21. Creating refunds

New refunds are created by pressing the New button in the Refunds tab of the Client window.

**Note**: A refund for a specific credit note can also be created in the **Edit Credit note** window by clicking the **Mark as paid** button.

The Illustrative Designs: Refunds	•							
Main Contacts Marketin	g Prices Quotes	Projects	Client Jobs	Invoices	Credit Notes	Payments	Refunds	Account
<u>N</u> ew <u>E</u> dit	<u>D</u> elete Stat	us: *All*		•				
Edit Refund								× ge
то: Т	he Illustrative Design	15			Date Se	nt: 24/03/2	017	
From: Unregistered Code: R-ILLDES0001								
Refund Linked with Credi	Refund Linked with Credit Notes							
* Credit Note Code	Credit Note Date	Credit No	ote Total	Linked wit	h this Refund			
CN-ILLDES0001	24.03.2017		300,00		200,00			
H + 1 of 1 > > > New Link Edit	Delete							•
	Linked: 200,00					Client C	urrency: EU	R
	Not Linked: 100,00							
RTF Temp	lates: Refund to Clier	nt - Templat	te - English.rtf	•	•	È   È+6	)	
						ОК	Canc	el

New/Edit Refund window contains the following data:

Date Received — part from reference purposes, this date will also be used by Global Date filter.

**Code** — the refund code is generated automatically. In this code the "R" character means that this is a refund, the letters afterwards represent code of the client, and the number is the value of the refunds counter for this client. Each client has an independent code counter for refunds.

**Value** — the total amount of the refund in the client's currency. TO3000 will calculate your revenues in your base currency according to the exchange rates.

If the client's currency differs from your base currency, the **Currency Exchange Rate** button will be available. By clicking this button, you may change the *currency exchange rate* used in this *refund*. Note that this button does not change the general exchange rate stored in your TO3000

database. To change the exchange rate for all future refunds, go to the **Exchange Rates** tab of the **Business Settings**.

**Notes** — any additional information can be entered here.

**Linked with Credit Notes** — the refund's value can be linked with credit notes — fully or partially. The table on the **Linked with Credit Notes** tab indicates which amount is linked to which credit note

#### Saving / Printing / E-mailing refunds

To print, save or E-mail a **Refund** as a text document, use the RTF template controls near the bottom of the **New/Edit** window.

Use the **RTF Templates** drop-down list to select the template which should be used for printing, saving or e-mailing this refund as an RTF file. Click the **Save**, **Save & Open**, **Print**, or **Send Mail** button to save, print, or e-mail the Refund.

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

To edit templates for refunds, in the **Backstage** view click **Business Settings** and select **Templates**. **Templates** for refunds are located in *C:\Users\Public\Documents\AIT\TO3000, Version 3D\Templates\CLIENTS\Refunds\*.

# 6. Prospects

## 6.1. **Prospect Window**

The **Prospect** window can be used to view, edit and enter new information about your *prospective clients*, as well as to manage *marketing* and *financial information*, like prices and quotes of your prospects.

When the deal is struck a prospect can be quickly converted into a full client.

It can also be used to store information and documentation of former or temporarily unavailable clients.

	Prosp	oects Clie	nts Pr	ojects							
		Ê	2		7 🛃						
Prospe	ct Prices	Quotes	Prospect	Jobs Inv	oices Credit No	otes Paym	ents Refunds				
	_										
Internet	Security Tech	nnologies 👻									
Main	Contacts	Marketing	Prices	Quotes	Prospect Jobs	Invoices	Credit Notes	Payments	Refunds	Files	Info

### **Prospect Window tabs**

Different tabs of the **Prospect** window represent different aspects and elements of your prospective client database. Prospect data is broken into the following **Prospect** window tabs:

- The Main tab contains the profiles of your prospects and basic information on them.
- The <u>Contacts</u> tab lists the contacts of the selected prospect. New prospect contacts can be added here.
- The <u>Marketing</u> tab contains marketing information added by your sales representatives or marketing staff.
- The <u>Prices</u> tab holds the individual price list of the selected prospect. Here this prospects's prices can be created and edited.
- The <u>Quotes</u> tab is used for issuing and managing quotes offered to the selected prospect.
- The Prospect Jobs tab contains the client jobs of the selected former or inactive client.
- The <u>Invoices</u> and <u>Payments</u> tabs these tabs hold all invoices issued to and payments made by the selected former or inactive client.
- The <u>Credit Notes</u> and <u>Refunds</u> tabs these tabs contain all credit notes received from and refunds issued to the selected former or inactive client.
- The Files tab this tab is used for accessing the selected prospect's files and folders.
- The <u>Info</u> tab is used for adding various prospect-related notes.

## 6.1.1. The Main tab

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

Magenta		
Main Contacts Marketing Prices Quotes Prospe	Jobs Invoices Credit Notes	Payments Refunds Files Info
New Prospect Delete	Profile Custom Fields*	
Clone	Code:	MAG Zana A
Move to Clients	Name:	Magenta Illagenta
* Name Currence	Postal Address:	ul. Wiatraczna 130
Target ILS	I	Kraków 21.097
Sonnenschein GmbH EUR	( )	Poland
Sky Ltd USD	L .	Now: 10.05.2017 15:22
Segen EUR	Contact Info:	E-mail: info@magenta.com
Confetti s p a	I	Phone: +48 88 489 90 00
Cielo s r l EUR	Web:	http://to3000.com
Magenta EUR	Payment Terms:	Within 30 days (from Invoice date)
Herz AG EUR	VAT Number:	637-19-23-852
Lingua EUR	Prospect Folder	r: D:\Business\Prospects\MAG
Milon ILS	Currence	CI ID
Eevee Valentine GBP	L Trusising Balling	EUN
Rocket Plc. USD	Invoicing Policy:	
Advanced Eilter is Emptys	FTP connections	
	General Information:	

### **Browsing prospects**

You can search for specific prospects using the <u>Find panel</u>. Enter a few characters from the prospect's name, or any other column displayed in the table, and the table will show only the entries that contain the entered characters.

Click on any prospect in the list to view and edit the prospect's profile to the right.

Once a new prospect has been added, their data can be edited in this profile.

You can create a new prospect record based on the data (profile, marketing, contact or pricing) of one of the existing prospects by cloning this prospect. To do so, select a prospect to clone, click the **More...** button next to the **Delete** button, and select "**Clone**"

Once you strike a deal with a prospect and they become a full client you can transfer them into the Client database. Click the **More...** button and select "**Move to Client**".

You can delete a prospect and all data related to this prospective or former client (quotes, projects, jobs, invoices, etc.). To do so, select a prospect to delete, and click the **Delete** button.

Each prospect entry can have a flag assigned to it. The prospect's flag can be changed by rightclicking their entry and selecting a flag.

prospects are listed in the form of a table. You can change the columns displayed in the table by using the <u>Customize Columns</u> option.

**ONOTE:** Due to filter operations (like the *local custom filter* and *global date filter*) you may not be able to see all the prospects in the database. Please refer to the <u>Local Custom Filter</u> topic for more details on filters and access restrictions.

#### Prospect profile

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

•Code — click this button to enter or change the prospect's code (15 characters maximum). This is the same code, which had been assigned, manually or automatically, when creating the new prospect record. This code is also used for naming prospect folders as well as in codes for quotes. You can also load the prospect's logo here. It will be displayed above their country's flag.

•Name — click this button to edit this prospect's name. This name can be up to 150 characters long.

•**Postal Address** — click this button to add or change the postal address of the prospect. See the <u>Postal Address of Prospect</u> topic for details.

•Contact Info button — allows you to add or change the contact information of the prospect. See the <u>General Contact Information</u> topic for more details.

•Web — opens the Edit Web Links dialog box, providing fields to enter your prospect's web site address (URL), as well as their LinkedIn, Facebook, and Twitter accounts. Click the address or the social media icons to open the corresponding links in your Internet browser..

•Payment Terms — allows you to specify payment terms for each prospect, and their minimum fees once the prospect is converted into a full client. See the <u>Payment Terms of Prospect</u> topic for more details.

• VAT Number — enter the prospect's legal tax number to have it automatically displayed and printed on invoices.

•**Prospect Folder** — this part of prospect's profile can be used to store and access the prospect files. Click the Folder button on the right side of the field to open the folder in the TO3000 Explorer (creating it if it does not exist yet).

•**Prospect Currency** — this currency will be used to issue quotes to this prospect. All the financial records for this prospect are kept in both your base currency and the prospect's currency, converted according to the exchange rates you set.

•Invoicing Policy — by adjusting the invoicing policy you determine the conditions upon which TO3000 3D+ will prompt you to invoice jobs once the prospect is converted into a full client. See the <u>Invoicing Policy of Prospect</u> 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 the parameters for access to the prospect's FTP folders. Shortcuts to these folders will be automatically added to the **Files** tab in this prospect's window. See the <u>Prospect FTP Connections</u> topic for details.

## Custom data

The prospect database can be customized by adding custom fields. Any custom fields that have been added to the prospects database, can be accessed by clicking **Custom Fields tab**, next to the **Prospect Profile** tab.

#### Postal address of prospect

The prospect's postal address determines the prospect's business location, and is automatically added to the invoices and quotes sent to this prospect. The following postal address data can be added:

**Street Address** — two separate addresses can be added. Each address entry can be 50 characters maximum. When editing quote templates you can choose which of the two addresses are contained in the quote.

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 Prospect** window. See the <u>Countries</u> topic for details.

**ZIP Code** — maximum 10 characters long.

**Time Zone** — The prospect's time zone is set automatically when you select their country, but you can change the time zone manually as well.

New Prospect Delete	Prot	file	Custom Fields			
Entor toxt to coarch	- Find Close	Pos	tal Address:	Kauppatori 4 Oulu	A	
Edit Postal Address		×	Time Zone Setti	ngs		x
* Street Address	Kauppatori 4		Set the Time	Zone:		
City	Oulu		Time Zone:			
State			(UTC+02:00	) Helsinki, Kyiv, Riga, Sofia, Tallinn	Vilnius	·]
Country	Finland	•	1			
ZIP Code	90100		- Current date	and time:		
			14.04.2017	17:24		
Local Time	14.04.2017 17:24		c			
Time Zone:	(UTC+02:00) Helsinki, Kyiv, Riga, Sofia, Tallinn, Vilnius					
					OK Cancel	
A	OK Cancel		tering in Finland,	revenue in US – 200.000&, 40	mployees, 3 offices, private ownership.	

## **General Contact Information**

Prospects in TO3000 have two types of contact information: general contact information (usually of a company rather than a person) and the contact information of the contact information of prospect's contact persons (<u>Contacts</u>). General contact information of a prospect can contain the following data:

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

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

Profile Custom Fields Contact Info: E-mail: mail@lightning-graphics.com Edit Contact Info х **The Lightning Graphics** mail@lightning-graphics.com E-mail: Send E-mail 2: Send Phone: Phone 2: Phone 3: Phone 4: Fax: Notes: OK Cancel

**Notes** — a plain text note, with no maximum length.

## Payment terms of prospect

According to the payment terms of a prospect, TO3000 will keep track of unpaid invoices and update the status of outstanding invoices once the prospect is converted into a full client: overdue, due today, due tomorrow, and so on.

This information is also stored when a former or inactive client is converted into a prospect.

For more information, see Payment terms of client

Payment Terms: On day 10 of the next month (from Invoice date)   Edit Payment Terms ×   Between: Unregistered   and: The Lightning Graphics   Minimum Fee: 700   (0 - No Minimum Fee)
Edit Payment Terms Between: Unregistered and: The Lightning Graphics Minimum Fee: 700 (0 - No Minimum Fee)
Between: Unregistered and: The Lightning Graphics Minimum Fee: 700 (0 - No Minimum Fee)
Minimum Fee: 700 (0 - No Minimum Fee)
◯ Within 30 - days
<ul> <li>On day 10 of the same month</li> </ul>
On day 10 of the next month
O On day 10 of the month following next
O Unknown/Other
Additional Notes:
OK Cancel

## Invoicong policy of prospect

Invoicing policy settings determine when TO3000 3D+ alerts user to invoice jobs once the prospect is converted in to a full client. This information is also stored when a former or inactive client is converted into a prospect.

For more information, see Invoicing policy of Client

To configure your invoicing policy regarding certain prospective client, click the **Invoicing Policy** button in this <u>Prospect's profile</u>.

Profile Custom Fields	
Invoicing Policy:	After total of USD700: 10 days maximum
Edit Invoicing Policy	x
Between:	Unregistered
and:	The Lightning Graphics
Invoice Client Jobs	
Immediately after com	ipleting job
Only after total of invo	piced jobs reaches
700,00	
🗹 Wait accrual no	longer than
10	days
	Client Currency: USD
	OK Cancel

## **Prospect FTP connections**

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

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

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

**FTP Server** — the address of the FTP server (for example ftp.server.com). Can be no longer than 50 characters. You can also specify which **Port** to use.

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

**Password** — this password will be used when TO3000 attempts to connect to the FTP folder. Can be no longer than 50 characters.

The **Passive file transfer** option allows you to enable passive mode for this connection. Consult your FTP server administrator regarding the type of file transfer you should use. If you are unsure, you can leave the **Passive file transfer** check box empty.

Enable **FTP over SSL/TLS** if the connection supports encryption. Consult your FTP server administrator as to whether you should use this option.

The **Keep connection alive** option sets whether TO3000 should continue trying to connect to a non-responding FTP address. If this option is enabled, you can also set the interval between connection attempts.

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

	Profile Custom Fields	
	FTP connections	
ľ	FTP connections of Internet Security Technologies	x
	Available FTP connections:	
	Internet Security Technologies	New
	Edit FTP Connection	Edit
	Connection Name:	Delete
	Internet Security Technologies	
	FTP Server: Port:	
	clients.projetex.com 21	
	User Name:	
	internet_security	
	Password:	
	•••••	
	Use passive transfer	
	FTP over SSL/TLS	
	Keep connection alive	
	Send interval (command NOOP), sec.:	
ľ	20	Close
	OK Cancel	

## Cloning

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

Internet	Security Tech	nnologies 🔻						
Main	Contacts	Marketing	Prices	Quotes	Prospect Jobs	Invoices	Credit Notes	Pay
Nev	New Prospect Delete							
Clone (	Clone Client X							
	Clo of V	Client Profile Contacts Marketing Prices	parts urity Teo	hnologies	:			
						ОК	Cancel	

The following data can be copied:

**Profile** — although it is unlikely that two different prospects 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 **Prospect** window) data may have time when creating a prospect for new department or subsidiary of an existing prospect.

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

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

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

#### Converting into a client

Once you strike a deal with a prospective client, you can convert them into a full client.

All the database entries connected to the prospect and all of the prospect's files will be moved into the Clients database.

To convert a client in to a prospect, click the **More...** button (hamburger icon) and select **Move to Clients.** 

#### 6.1.2. Contacts tab

A prospect's *Contacts* are persons on the client side which you work with regarding this prospect's potential projects/jobs.

The **New** button opens the **New Contact** window, where the details of a new contact person can be added.

The **Edit** button opens the **Edit Contact** window, where the details of the currently selected contact person can be edited.

The **Delete** button deletes the currently selected contact.

The **Clone** button creates a complete copy of the currently selected contact and adds it to the list of this prospect's contacts. The cloned contact will have the *(Cloned contact)* text in front of the contact name.

In	Internet Security Technologies: Contacts 💌							
Main Contacts		Marketing	Prices Quotes		s Pro	Prospect Jobs		
	New	<u>E</u> dit	<u>D</u> elete			Clone		
*	Position	Salutation	Name			E-mail		
Þ	Project Manager	Mrs.	/rs. Charlotta Rintala			charlott	a@	
	Project Manager	Mrs.	Tania Or		projects	5@i		
	CEO	Ms.	Helga Tu		helga@	inte		
Accounting		Mr.	Ir. Olle Rosengrer			account	s@	

#### 6.1.3. Marketing tab

The **Marketing** tab of the **Prospect** window stores marketing information about the selected prospect. This includes a general note, Marketing links (URL and e-mail) and a log of timed marketing records (**Marketing Tracker**).

The **Marketing Tracker** can contain any number of records, each having a **Date**, **Subject** (250 characters maximum) and **Description** (a plain text note with no length limitation).

The **Date** and **Subject** fields of a record cannot be empty. Records in the **Marketing Tracker** can be sorted by **Date** or by **Subject**.

In	nternet Security Technologies: Marketing 💌							
	Main Contacts Marketing Prices Quotes Prospect Jobs Invoices Credit Notes							
	Notes Links Tracker							
	New Record Edit Delete							
	Drag a column header here	to group by that column						
*	Date Subject							
•	31.07.2015	eComXpo, virtual tradeshow						
	11.12.2015	Internet security conference, possible Finnish translation projects						

## 6.1.4. Prices tab

Each prospect in TO3000 can have a set of prices individual to them. These prices can be assigned on the **Prices** tab of the **Prospect** window.

Only one price per group of services, service and unit combination can exist in an individual pricelist.

The New button opens the New Price window, where the details of a new price can be added.

The **Edit** button opens the **Edit Price** window, where the details of the currently selected price can be edited.

The **Delete** button deletes the currently selected price.

In	ternet	Security Tech	nologies: Price	25 -				
	Main	Contacts	Marketing	Prices	Quotes	Prospect Jobs		
	<u>N</u> e	w	<u>E</u> dit	<u>D</u> elete				
*		Group	of Services			Service		
Þ	Trans	lation			English => Swedish			
	Trans	lation			Swedish => English			

You can print a prospect's price list or save it in a text file by selecting the template and clicking the **Save**, **Save & Open** or **Print** button at the bottom of the window.

You can also click the **Send Mail** button to open the TO3000 Mail Sender and send it to the Prospect's E-mail address as an attachment.

## 6.1.5. Quotes tab

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

Like most workflow documents in TO3000 3D+, quotes can be saved to a printable file or printed. Please refer to the <u>Creating quotes to prospects</u> topic for more details.

A quote can have one of the five statuses: *Unknown*, *Accepted*, *Rejected*, *Received* and *Corrected*. 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
- purple for Received or Corrected

A quote's status can be changed in the **Edit Prospect Quote** window. Please refer to the <u>Creating</u> <u>quotes to prospects</u> topic for more details.

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

I	nternet	Security T	Fechnologies: Quo	tes 🕶										
	Main	Contac	ts Marketing	Prices	Quotes	Prospect Jol	bs	Invoi	ces	Credit Notes	Payments	Refunds	Files Inf	o
	<u>N</u> ew	Quote	<u>E</u> dit	<u>D</u> el	ete	📃 👻 Statu	us: */	All*			•			
*	C	ode	Name			Clone		]  <sub>D</sub>	)raft (	Prospect Jobs f	or Q-INTSE	0001		
•	Q-IN1	ISEC000	Nulla quam.	II	nternet Se	curity Technolo	ogies		N	lew	Edit	Delete		
	Q-INT	ISEC000	Suspendisse pos	suere I	nternet Se	curity Technolo	ogies							
								D			er here to gr	oup by that (		
								*	Nam	e		Group of Ser	vice Service	2
								•	Nulla	a quam.		DTP Tasks	DTP in	Adobe Page

### 6.1.6. Prospect jobs tab

**Prospect Jobs** belonging to the currently selected former or inactive client can be viewed on the **Prospect Jobs** tab of the **Prospect** window.

Jobs can not be created, deleted, or edited here. This tab serves only to store previously created jobs.

Use the Status filter drop-down list to display only prospect jobs with a specific status.

With the help of the **Invoiced** filter drop-down list you can view only the prospect jobs which have or have not been invoiced.

Ir	nternet Sec	urity Tech	nnologies: Pros	pect Jol	bs 🕶						
	Main C	ontacts	Marketing	Price	s Quotes	Prosp	ect Jobs	Invoices	Credit Notes	Payments	Refunds
⊻iew Status: *All*								• I	nvoiced: *All*	•	
*	Code		Job Name		Assigne	ed	Dea	dline	Completed	Group	o of Services
	J-INTSE	COI SSH to	echnology		29.12.2016	00:00	10.01.20	17 18:00	08.01.2017 18:0	0 Editing	
	J-INTSE	CO Traini	ng Schedule		22.12.2016	00:00	13.01.20	17 18:00	Heads-Up	Editing	

### **Prospect Job Statuses**

Jobs in the list are shown in different colors. These are determined by the current status of each job:

Green — the job is not completed yet, but its deadline is in the future.

Blue — the job is not completed and due today.

Red — the job is not completed and overdue (its deadline is in the past).

Black — the job is completed.

**Note:** You can change the colors on the Colors: Status tab of the User Settings menu in the Backstage view.

Also, if a job has any status other than **Normal**, it will be highlighted in a different background color:

Orange background — On Hold status

Green background — Heads-Up status

Grey background — Canceled status

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

**Note:** To configure the status colors, in the **Backstage** view click **User Settings**, then click **Colors: Status**.

## 6.1.7. Invoices tab

The **Invoices** tab of the **Prospect** window is used to keep record of invoices issued to currently selected former or inactive client.

Invoices can not be created, deleted, or edited here. This tab serves only to store previously issued invoices.

In	ternet Se	curity Tech	nologies: Ir	nvoices 💌								
1	Main	Contacts	Marketin	g Prices	Quo	tes	Prospect Jo	bs	Invoices	Credit No	tes	Payments
View Status: *All*								• A	pproved:	*All*	•	
*		Client		Code	2	Gl	obal Code		Sent	Currency	Ex	change Ra
۲	Internet	t Security 1	Technolog	I-INTSEC00	01	ACM	1E-10017/201	0	5.03.2017	EUR		1,00
	Internet	t Security 1	Technolog	I-INTSEC00	02	ACM	IE-I0018/201	22	2.06.2016	EUR		1,00

#### Filters

You can choose to view only invoices with a specific status. To display only the invoices with a particular status, click the **Status** filter drop-down list.

You can also set TO3000 to display only those invoices which have or have not been approved by applying the **Approved** filter.

#### **Invoice Statuses**

Invoices in the list are shown in different colors. These are determined by the current status of each invoice:

Green — the invoice is outstanding and is expected to be paid soon.

Blue — the invoice is *outstanding* and is expected to be paid today.

Red — the invoice is *outstanding* and its *payment is overdue*.

Black — the invoice has been settled (paid) or voided.

**Note:** You can change the colors on the Colors: Status tab of the User Settings menu in the Backstage view.

## 6.1.8. Credit notes tab

The **Credit Notes** tab of the **Prospect** window displays Credit notes for the currently selected former or inactive client.

Credit Notes can not be created, deleted, or edited here. This tab serves only to store previously issued credit notes.

Internet	Internet Security Technologies: Credit Notes 🔻											
Main	Contacts	Marketing	Prices	Quotes	Prospect Jobs	Invoices	Credit Notes	Payments				
<u>V</u> ie	View Status: *All*											
*	* Code Client Sent Value Total											
► CN-IN	VTSEC0001	Internet Secu	urity Tech	nologies	24.03.2017	30	0,00	300,00				

### 6.1.9. Credit Note Statuses

Credit notes can have one of four statuses:

- Closed the credit note is linked to an invoice with enough unlinked value to cover it completely.
- Awaiting payment the credit note has due balance and has not been linked to a refund.
- Partially paid the credit note has been linked to a refund but still has due balance.
- Fully paid the credit note is linked to an invoice and it's value is fully covered.

#### Filter

Use the **Status** filter drop-down list to display only credit notes with a specific status (Closed, Awaiting Payment, Partially Paid, or Fully Paid).

#### 6.1.10. Payments tab

The **Payments** tab of the **Prospect** window displays the payment records of the currently selected former or inactive client.

Payments can not be created, deleted, or edited here. This tab serves only to store previously received payments.

Internet	Security Tech	nnologies: Payr	nents 🝷						
Main	Contacts	Marketing	Prices	Quotes	Prospect Jobs	Invoices	Credit No	tes	Payments
View Status: *All*									
*		Client			Code	Date F	Received	Т	otal Paid
Interr	net Security	Technologies			P-INTSEC0001	24.0	6.2016		1 500,00
Interr	net Security 1	Technologies			P-INTSEC0002	08.0	7.2016		750,00

#### Filter

Use the **Status** filter drop-down list to display only the payments which are still to be linked with invoices, or only the fully linked ones.

## 6.1.11. Refunds tab

The **Refunds** tab of the **Prospect** window displays the refund records of the currently selected former or inactive client.

Refunds can not be created, deleted, or edited here. This tab serves only to store previously issued refunds.

Int	ernet Security Tech	nologies: Refu	inds 🝷							
N	Aain Contacts	Marketing	Prices	Quotes	Prospect Jobs	Invoices	Credit Note	es Payments	Refunds	Files
	<u>V</u> iew St	atus: *All*		•						
*	Code		Client		Date Sent	Tota	l Paid	Linked	Curr	ency
	R-INTSEC0001	Internet Se	ecurity Teo	hnolo	24.03.2017		300,00	30	0,00 El	JR

## Filter

Use the **Status** filter drop-down list to display only the Refunds which are still to be linked with a credit note, or only the fully linked ones.

## 6.1.12. Files tab

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

Files of client contain invoices, quotes and other documentation of the prospect.

Spearow	Files -											
Main	Contacts	Marketing	Prices	Quotes	Prospect Job	s Invoices	Credit Notes	Payments	Refunds	Files	Info	
Explo	D:\Bu	usiness\Prosp	ects\TES1	L\Quotes\	Q-TES10001							
					🚱   🔏 🗇	ñ 🗶						
🔰 Pros	pects\TES1				Name			Size	Datetime			
<u>)</u> N	/arketing				🖳 Q-TES1000	1.rtf		86 KB	14.07.20	17 16:4	16	
	Quotes	001										
2	Refresh All											🗣 Сору 🛧 Сору
		Shortcuts			FTP: •	Connect						
💼 Clie	nt FTP				Name		9	ize Date				
Coca	l Folders											

## 6.1.13. Info tab

The **Info** tab of the **Prospect** window can be used to enter any optional additional information regarding the selected prospect in plain text format. These notes will be available to all project manager users.

Each note record consists of the following elements:

- Subject maximum 100 characters long.
- Category new note categories can be added with the help of the Corporate Settings >> Categories menu in the Backstage view.
- **Information** a plain text note with no maximum length.

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

:	nternet	Security Tech	nnologies: Info	•										
	Main	Contacts	Marketing	Prices	Quotes	Prospect Jobs	Invoices	Crea	dit Notes	Payments	Refunds	Files	Info	
	<u>N</u> e	w	<u>E</u> dit	<u>D</u> elete					Payment	ts are usually	/ delayed, c	ommon	expla	nation
-	*		Subjec	t										
	Bad p	ayment hist	tory - always	request ir	nvoice rece	eipt Accountant	Note							

# 6.2. Prices Window

The **Prospect Prices** window displays your general price-list. These prices can be used when creating quotes for any prospect in your database.

**Note:** Any prices added to this list will also appear on the **Client Price List**, and vice versa.

The **New** button opens the **New Price** window, where the details of a new price can be added.

The **Edit** button opens the **Edit Price** window, where the details of the currently selected price can be edited.

The **Delete** button deletes the currently selected price.

Double-click any price record in the table to edit that price.

	Prospects	C	ients	Projects
		<u> </u>		2
Prospect	Prices Q	uotes	Prosp	pect Jobs
Prospects: Pri	ices 🕶			
<u>N</u> ew	<u>E</u> dit		<u>D</u> el	ete
* Group o	of Services		Serv	vice
Translatio	n	Engli	sh => (	German
Translatio	n	Frend	:h => E	nglish

The **Save** button saves the current price list in an *RTF*, *DOC* or *PDF* document.

The **Save & Open** button saves the current price list in *RTF*, *DOC* or *PDF* format, and then opens this document.

The **Print** button opens the printer settings, which can be used to print the document.

The **Send Mail** button opens the Mail Sender, with the Subject automatically filled in and the created document attached.

To configure the price list templates, in the Backstage view click **Business Settings** and then click **Templates**. Price list templates are stored in the *C*:\*Users\Public\Documents\AIT\TO3000, Version 3D\Templates\PROSPECT\Prices\* folder.

## 6.3. Quotes window

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

- The Prospect Quotes window displays all quotes for all prospects.
- New quotes cannot be created using this window.
- Existing quotes cannot be deleted using this window.

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

	Prospects Clients Pr	ojects					Q	Sear
Prospect Pi	Quotes Prospect	Jobs Invoices	Credit Notes	Payments	Refunds			
Prospects: Quot	es 💌							
<u>E</u> dit	Status: *All*		•					
Enter text to	search	▼ Find	Clear	Draft Prospe	ct Jobs for	Q-INTSEC000	1	
* Code	Name		Client	New	<u>E</u> d	it <u>[</u>	<u>)</u> elete	
Q-INTSEC00	Nulla quam.	Interne	t Security Tec	Drag a colun	nn header h	iere to group	by that c	
Q-INTSEC00	Suspendisse posuere	Internet	t Security Tec	* Name		Grou	ip of Serv	vices
				Nulla quam	ı.	DTP	Tasks	

#### **Quote Status**

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

- Blue for unknown quote status
- Green for accepted quote status
- Red for rejected quote status
- Purple for received or corrected quote status

**Note:** You can change these colors in the Colors: Status tab of the User Settings menu in the Backstage view.

## 6.4. Prostect Jobs window

All jobs for former or inactive prospects stored in the database are listed in the **Prospect Jobs** window. The options available for this window are the same as those for the **Prospect Jobs** tab of the **Prospect** window. The major difference is that the **Prospect Jobs** window displays all prospect jobs of all former or inactive prospects.

		Prospects Cli	ents Projects					(
					<b></b>			
F	Prospect	Prices Quotes	Prospect Jobs	Invoices	Credit Notes	Payments	Refunds	
Ρ	rospects: Pro	ospect Jobs 👻						
	<u>V</u> iew	Status: *All	k		•	Invoice	d: *All*	•
*	Code	Job Name	Ass	igned	Deadline	Co	mpleted	Group of Services
	J-INTSECO	SSH technology	29.12.2	016 00:00	10.01.2017 18	:00 08.01	.2017 18:00	Editing

#### Filters

Use the Status filter drop-down list to display only prospect jobs with a specific status.

Use the **Invoiced** filter drop-down list to display only those prospect jobs which have or have not been invoiced.

#### **Prospect Job statuses**

Jobs in the list are shown in different colors. These are determined by the current status of each prospect job:

- Green the job is not completed yet, but its deadline is in the future.
- Blue the job is not completed and due today.
- Red the job is not completed and overdue (its deadline is in the past).
- Black the job is completed.

**Note:** You can change the colors on the Colors: Status tab of the User Settings menu in the Backstage view.

Also, if a job has any status other than **Normal**, it will be highlighted in a different background color:

- Orange background On Hold status
- Green background Heads-Up status
- Grey background Canceled status

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

## 6.5. Invoices window

The **Prospect Invoices** window displays a general overview of all invoices, issued to all former or inactive clients in the database. It can be used to identify currently unpaid invoices and obtain a total of balance due according to all invoices issued.

The options available for this window are the same as those for the **Invoices** tab of the **Prospect** window. The major difference is that the **Prospect Invoices** window displays all invoices for all former or inactive clients.

		Pros	pects	Clients	Projects	5						
								2				
F	Prospect	Prices	5 Quotes	Prospe	t Jobs	Invoices	Credi	t Notes	Paym	ents Ref	funds	
P	rospects: I	nvoices	-									
	<u>V</u> iew		Status:	*All*				•	A	oproved:	*All*	•
*		Client		Cod	e	Global C	ode	Ser	nt	Currency	/ Excha	ange Ra'
	Internet	Security	Technolog	I-INTSEC0	001	ACME-I001	17/201	05.03.	2017	EUR		1,00
Þ	Internet	Security	Technolog	I-INTSEC0	002	ACME-I001	18/201	22.06.	2016	EUR		1,00

## Filters

Use the Status filter drop-down list to display only invoices a specific status.

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

#### **Invoice Status**

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

- Green the invoice is Outstanding and is expected to be paid soon.
- Blue the invoice is Outstanding and is expected to be paid today.
- Red the invoice is Outstanding and its payment is overdue.
- Black the invoice has been Settled (paid).

**Note:** You can change the colors on the **Colors: Status tab** of the **User Settings** menu in the **Backstage** view.

TO3000 automatically assigns statuses to Invoices depending on the Payment Terms set for each client.

## 6.6. Credit notes window

The options available for this window are the same as those in the **Credit Notes** tab of the **Prospect** window.

The major difference is that the **Prospect Credit Notes** window displays all credit notes to all former or inactive clients.

Use the **Status** filter drop-down list to display only credit notes with a specific status (Closed, Awaiting Payment, Partially Paid, or Fully Paid).

Pros	pects Clients Proj	jects					
	i 🖪						
Prospect Prices	Quotes Prospect Jo	obs Invoices Credit I	Notes Payments				
			_				
Prospects: Credit No	tes 🔻						
View Status: *All*							
* Code	Client	Sent	Value				
CN-INTSEC0001	Internet Security Techno	ologies 24.03.2017	300,00				

# 6.7. Payments window

The **Prospect Payments** window displays all payments from all former or inactive clients in one table. This window can be used to obtain total values of money transfers received from former or inactive clients.

Use the **Status** filter drop-down list to display only payments which are still need to be linked with invoices, or only the fully linked ones.

	Prospe	ects Cli	ents Projects	;					
Prospect	Prices	Quotes	Prospect Jobs	Invoices	Credit Note:	s Payments	Refun	ds	
Prospects: P	ayments 🔻								
<u>V</u> iew	Sta	tus: *All*		•					
*	* Client					Date Receiv	ed	Total Paid	
Internet S	ecurity Te	echnologie	5	P-INTS	P-INTSEC0001 24.06.20			1 500,00	
Internet S	ecurity Te	echnologie	s	P-INTS	EC0002	08.07.2016 75			

# 6.8. Refunds window

The options available for this window are the same as those in the **Refunds** tab of the **Prospect** window.

The major difference is that the **Prospect Refunds** window displays all refunds to all former or inactive clients.

Use the **Status** filter drop-down list to display only refunds which are still to be linked with a credit note, or only the fully linked ones.

	Prospects Clients Projects											
						<b></b>						
P	Prospect Prices Q		Quotes	Prospect Jobs	Invoices Credit Not		otes Payme	ents Refu	nds			
Prospects: Refunds -												
	<u>V</u> iew	Sta	tus: *All*		•							
*	Co	Code		Client	Date	Sent	Total	Paid				
R-INTSEC0001 Interr				Security Technolo	24.03	.2017		300,00				

#### 175 Translation Office 3000 Help

# 6.9. Creating prospects

*Prospects in TO3000 3D+ are created on the Main tab of the Prospect window.* To create a Prospect record, please follow the steps below:

- 1. Click the **New Prospect** button above the **Prospect** list on the **Prospect** window > **Main** tab.
- 2. Fill the fields of the New Prospect window:

•Enter the name of the prospect in the Name text field.

•The code for the **Prospect** record in the **Code** text field is generated automatically (it will usually contain the first letters of the **Name** in this case) but can be edited as well.

•Select the Prospect Currency using the corresponding drop-down list.

•Click OK to confirm or Cancel to discard the entered information.

Internet	Security Tecł	hnologies 🔻					
Main	Contacts	Marketing	Prices	Quotes	Prospect Jobs	Invoices	Credit
Nev	w Prospect	<u>D</u> elete	2	<b>-</b>			
New Pro	spect						×
Nar	me:						
Ma	rley & Marle	ey					
Coo	de:						
MA	RMAR						ſ
Clie	nt Currency:	:					
EUF	R 🔻						
							-
					ОК	Cancel	

# 6.10. Creating contacts

To add or edit a contact person to a prospect's profile, click the **New/Edit** button on the **Contacts** tab of the **Prospect** window.

Intern	et Securit	y Technologies: (	ontact	s <b>*</b>						
Mair	n Cont	acts Marketin	g Pr	rices	Quotes	Prospect J	lobs	Invoices	Credit Notes	F
1	<u>N</u> ew	<u>E</u> dit	D	elete		Clone				
Edit	Contact									x
-	Cop	y			Salutation	: Mrs.			•	-
	🖉 Dele	te			Name	: Charlotta	a Rint	ala		
	声 Load	d			Position	ner		1		
	<ul> <li>Assign From Camera</li> <li>Save As</li> </ul>				1 OSIGOI	in project in	nanaş	gei		
		E-Mail:	charlo	otta@i	internet-se		Send			
		E-Mail 2:							Send	
										-
		Phone:	211-897-43-78							
		Phone 2:								
		Phone 3:								
		Phone 4:								1
		Fax:	_							1
No	otes:									

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

**Photo** – up to 110x120 pixels. Click **Load**, **Paste** or **Assign from camera** to add a photo to the contact's profile. Click **Delete** to remove the current photo from the profile.

**Salutation** – select one of the salutations, entered with the help of the <u>Advanced Settings</u> section of TO3000 3D+. This salutation can then be automatically displayed on all printable documents next to this contact's name.

Name - maximum 80 characters.

**Position** – maximum 40 characters. Like the salutation, the position will also be automatically displayed on printable documents.

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

## 6.11. Creating prospect prices

To add or edit a price, click the **New/Edit** button on the **Prices** tab of the **Prospect** window to create/edit an individual price, or in the **Prospect Prices** window to create/edit a general price.

	ospects, Prices					
	<u>N</u> ew <u>E</u> dit	<u>D</u> elete				
*	Group of Services	Service	Units	Currency	Price	
E	dit Price for Prospects					x
Г						
	Group:	Translation				-
	Service:	English => Germa	n			•
	Units:	words		•		
	Price	0	12 (per unit)			
	- Thee		iz (per unit)			
L	Currency:	EUR	•			
L						
					ОК	Cancel

Prospect prices in TO3000 3D+ have the following parameters:

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

**Service** - each group of services contains a separate list of services. Before selecting a service, select the group of services first. To add or edit a service please open Business Settings in the Backstage view, and select the <u>Services</u> section.

**Units** - prices in TO3000 3D+ are quoted per certain units. Price can only be applied to a Prospect Draft Job with its volume in the same units. To add custom units please open Business Settings in the Backstage view, and select the <u>Volume Units</u> section.

**Price (per unit)** - To add currencies to view open Business Settings in the Backstage view, and select the <u>Currencies</u> section. To configure exchange rates between your base currency and other currencies, open Business Settings in the Backstage view, and select the <u>Exchange Rates</u> section.

## 6.12. Creating quotes

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.

Internet	Security Tech	nnologies: Quot	tes 💌									
Main	Contacts	Marketing	Prices	Quotes	Prospect Jobs	Invoices	Credit Notes	Payments	Refunds	Files I	nfo	
<u>N</u> ev	v Quote	<u>E</u> dit	<u>D</u> ele	ete 🗄	E 👻 Status:	*All*		•				
Edit P	rospect Quote	2										х
		Pro	spect:	internet S	ecurity Technol	ogies			Date S	ent: 02/	10/2016	
		Prospect Pl	∨I:	None -					Co	ode: Q-I	NTSEC0002	
	Status:										known	-
	Draft Project: Suspendisse posuere											
Pros	Prospect Jobs Request for Quote Answer Custom Fields											
	New Edit Delete											
* Na	ame	Group of	Service S	ervice	Unit	Volume	P	rice	Pricir	ng Tota	I	
► Su	Suspendisse post DTP Tasks     DTP in Adobe pages (1800 c 0     0,00     per unit									init 0,00		
H4 4	( 📢 1 of 1	► ► ₩	4								-	ŀ
	Discount/N	/larkup: - No	ne - (0,00	)%)	₹ 0,00		Tax:	- None - (0,	,00%)	•	0,00	
1	Discount/Ma	rkup 2: - No	ne - (0,00	)%)	· 0,00		Tax 2:	- None - (0,	,00%)	•	0,00	
	Net Job	s Total: <b>0,00</b>										
	Quote F	Folder: D:\Bu	siness\Pr	ospects\I	VTSEC\Quotes\Q	-INTSEC000	2					2
1	Draft Timelin	ie:				=/	Assigned					
	Assigned:				Deadline:				Quote To	tal: <b>0,00</b>	)	
	27/01/2017 00:00		06/02/2017	18:00		Prospect Currency						
		(83 days ago)			(7	3 days ago	)					
	RTF Templates: MultiQuote to Prospect - Template - English.rtf 🔹 👔 🎲 😂 🖾											
	OK Cancel											

**Prospect PM** - select one of the prospect's contacts as the project manager for this draft project (on the prospect's side). Please see the <u>Contacts</u> topic for details.

**Date sent** - aside from reference purposes, this date will also be used by the *Global Date filter*. Please see the <u>Global Date Filter</u> topic for details.

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

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

**Draft Project** - the name of the quote. A draft project's name can contain 100 characters maximum.

**Prospect Jobs** - lists the draft prospect jobs in this quote. Use the <u>Customize columns</u> option to configure which data should be displayed. Please see the <u>Draft Prospect Job</u> topic for more details.

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

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

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

**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 number of custom fields in quotes, their controls can be found on the **Custom Fields** tab. For more information on adding custom fields please see the <u>Custom Fields</u> topic.

## Saving and printing Prospect Quotes

You can print quotes or save them in text files by selecting an RTF template and clicking the **Save**, **Save and Open** or **Print** buttons at the bottom of the window. Click **Send Mail** to open the <u>Mail Sender</u> for the generated quote.

Use the RTF Templates drop-down list to select the template.

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

To edit templates for quotes click User Settings in the Backstage view and select **Templates**. **Templates** for Prospect Quotes are located in the *C*:\*Users\Public\Documents\AIT\TO3000, Version 3D\Templates\PROSPECTS\Quotes\* folder.

## 6.12.1. Draft Prospect jobs

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

Inte	ernet Securit	ty Techi	nologies: (	)uotes 🔻								
N	lain Cont	tacts	Marketir	g Prices	Quotes	Prospect Jobs	Invoices	Credit Notes	Payments	Refunds	Files	Info
	<u>N</u> ew Quot	e	<u>E</u> dit	<u>D</u> el	ete	∃ ▼ Status:	*All*		•			
*	Code		Nam	e		Client	Draft	Prospect Jobs f	or Q-INTSEC	0002		
		0C Null	a quam.	Ir Dosuere Ir	nternet Seo	curity Technologi	es i	New	<u>E</u> dit	<u>D</u> elete		
	Edit Draft Prospect Job											
	Edit Draft Prospect Job x											
	Details	Count	Notes									_
		N	ame: Su	spendisse p	osuere							
		Gr	oup: DT	P Tasks					•			
		Ser	vice: DT	P in Adobe	PageMake	er			•			
		Vol	ume:	0	pages (1	1800 characters)		<= AnvC	ount	<= CATC	ount	
		F	Price:	0.00	per unit	pages (1000 characters)				=>		
				-,	per unit							
			То	tal: 0,00								
			Cu	rrency: EUR								
	OK Cancel											

Draft Prospect Jobs contain 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 Business Settings in the Backstage view, and select the <u>Groups of Services</u> section.

**Service** - each group of services contains a separate list of services. Before selecting a service, select the group of services first. To add or edit a service please open Business Settings in the Backstage view, and select the <u>Services</u> section.

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

**NOTE:** Please make sure that correct volume units have been set before using AnyCount or CATCount. Jobs in such volume units as hours, for example, cannot be counted with AnyCount.
**Price** - the price value can be either entered manually or copied from the individual price-list of the prospect. Click the **<=Prices** button to copy the price from the prospect's price list. Click the **=>** button to add this price to prospect's price-list.

# 7. Projects (With Projects Mode only)

## 7.1. Project window

**The 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 the **Project** window click the **Project** icon from the **Projects** tab of the **Ribbon**.

	Prospec	ts (	Clients	Projects
Project	Client Jobs			
0023, VP	N connection tr	oublesh	ooting	•
Main	Client Jobs	Files	Info	Calendar

### Project Window tabs

Different **tabs** of the Project window represent different aspects and elements of your projects, stored in the TO3000 3D+ database. Project data is broken into the following Project window tabs:

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

### 7.1.1. Main tab and Project Profile

**The Main** tab of the **Project** window contains a *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 the **Main** tab of the **Project** window, click the **Project** icon in the Ribbon, and then select the **Main** tab.

003	30, Madrid G	City Guide 🔻				
N	1ain Clie	nt Jobs Files Info Calend	lar			
ľ	New Proje	ect <u>D</u> elete <u>C</u> lo	one		Project Profile Custom Fiel	lds
			- Sind Class	*	Name:	Madrid City Guide
1.6	enter text t	o search	• Find Clear		Client:	Key Outsourcing Studios
*	Code	Name	Client		Client PM:	Klemens Johansson
×	0030	Madrid City Guide	Key Outsourcing Studios			
	0031	Virtual Reduction Engine	Global Concepts Universal	nll		
	0032	Thermal Displacement Guide	The Lightning Graphics			
	0033	ADS - User Guide	Key Outsourcing Studios			
	0034	Norby workshop	The Lightning Graphics		Timeline:	Assigned: Deadline: Completed:
	0035	SSH technology	Internet Security Technologies			18.12.2015 00:00 📄 03.01.2017 18:00 🍺 12.01.2017 18:35
	0036	Training Schedule	Internet Security Technologies			(490 days ago) (108 days ago) (99 days ago)
	0037	Server-client technology spe	Enigma Server Technologies		Project Folder:	D:\Business\Projects\0030 Madrid City Guide 📂
	0038	Analog deviation description	Network Community Techno		Based on Ouote:	
	0039	Remote Desktop Manual	Future Unified Resources		-	
	0040	Localization www.fuunre.com	Future Unified Resources		General Information:	
A	0041 dvanced	Localization of web-site FAO <filter empty="" is=""></filter>	Network Community Techno	-	The guide will be shared for	free on informational booths for tourists
M		13 of 45 🕨 🕨	₩2 →			
5	Status: *A	<u>  *</u> •				

### **Project list options**

To *search* for a project by its name, or any other field currently displayed, type the string being searched into the field over the project list and click Find.

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

Information displayed in projects list can be configured. Use the **Customize columns** option to add or remove columns (Deadline, PM and so on).

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

#### Status colors and flags

Projects in the list are shown in different colors. These are determined by the current status of each project:

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).

Black — the project is completed.

**Note:** You can change the colors on the Colors: Status tab of the User Settings menu in the Backstage view.

Also, if a project has any status other than **Normal**, it will be highlighted in a different background color:

Orange background — On Hold status

Green background — Heads-Up status

Grey background — *Canceled* status

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

**Note:** To configure the status colors, in the **Backstage** view click **User Settings**, then click **Colors: Status**.

To flag a project, right-click it's entry and select a flag.

### Editing project data

A Project Code is automatically assigned to each Project in TO3000 3D+. All Project Codes are unique and cannot be edited.

Name - the project's name can be up to 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 the default client's PM for all new client jobs in this project. See the <u>Contacts List</u> topic for details on adding and editing contacts.
- **Timeline** the timeline of a project in TO3000 3D+ includes the assigned and deadline dates, and the date when the project has been actually completed. The Deadline and Completed values are taken into account when the program determines the status of projects (like due today, overdue and so on).
- Project Folder this part of the project's profile can be used to store and access the project's work files. Click the Folder button on the right side of the field to open the folder in TO3000 Explorer (creating it if it does not exist yet).
- **Special Status** these are used when project needs to be put *on hold*, when you create a *heads-up* (or potential) project or *cancel* a project. Projects with *on hold* status have their deadlines undetermined, thus *on hold* projects cannot become overdue. Projects with *heads-up* status cannot be set as completed, since *heads-up* status assumes that work has not yet started. A project can also be *cancelled*. A cancelled project has no deadline, since the status implies that it was abandoned.
- **General Information** the project profile can contain any general information relevant to this project in the form of a plain text note.

### **Custom Project Data**

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

To add custom fields to projects, click Advanced Settings in the Backstage view, and click the **Fields** section.

### 7.1.2. Client Jobs tab

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

0030, Madrid Ci	ty Guide: Client J	obs 💌				
Main Client	t Jobs Files	Info C	Calendar			
New	<u>E</u> dit	<u>D</u> ele	te Status: *All*		<ul> <li>Invoice</li> </ul>	ed: *All* 🔻
* Code	Job Nan	ne	Project	Assigned	Deadline	Completed
J-KOS0004	Madrid City Gui	de - trans	Madrid City Guide	18.12.2015 00:00	03.01.2017 18:00	03.01.2017 18:00
J-KOS0005 N	Madrid City Gui	de - trans	Madrid City Guide	07.12.2016 00:00	29.12.2016 18:00	01.01.2017 18:00

### **Filtering Client Jobs**

Use the Status filter drop-down list to display only client jobs with a specific status.

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

### **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 in a different background color:

- Orange background On Hold status
- Green background Heads-Up status
- Grey background *Canceled* status

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

**NOTE:** You can change the colors on the <u>Colors: Status</u> tab of the User Settings menu in the Backstage view.

### 7.1.3. Files tab

The **Files** tab of the **Project** window provides you with the ability to create, view and search for files and folders related to this Project. Folder navigation is described in the <u>File manager</u> topic.

0018, Engine scheme ER-34221: Files 🔻	-0				
Main Client Jobs Files Info Calendar					
Explore D:\Business\Projects\0018 Engine sc	heme ER-34221				
1	🚱 📈 🗇 🛍 🗶				
Projects\0018 Engine scheme ER-34221	Name	Size	Datetime		
Control of the second	Utgoing		Сору		
Shortcuts	Explore D:\Business\Clients\DEFDES\	Jobs			
Client FTP     Local Folders					
🚞 Client Folder	Name		Size Datetime		
	J-DEFDES0005.rtf	30	KB 14.07.2017 16:43		

### 7.1.4. Info tab

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

0018, Engine scheme ER-342	21: Info 💌	
Main Client Jobs Fi	es Info Calendar	
<u>N</u> ew <u>E</u> dit	Delete	Lorem ipsum dolor sit amet,
* Subject	Category	euismod ante. Aenean eleife
Lorem ipsum	- None -	sodales, diam massa tempo tincidunt ligula, nec porttitor

Subject - maximum 100 characters long.

**Category** - categories of notes can be added by clicking **User settings** in the **Backstage** View and selecting **Categories**. See the <u>Categories</u> topic for additional details.

Information - a plain text note any umber of characters long.

Notes can be filtered by the Subject or Category columns.

### 7.1.5. Calendar tab

**The Calendar** tab of the **Project** window displays *client jobs* belonging to the currently selected *project* in the visual format of *calendar blocks*. Each block stretches across the calendar from assignment until completion, or until the deadline if the job has not been completed yet.

Double-click any block to open the corresponding job for editing.

See the <u>Using Calendars</u> topic for more information on calendars.

0018,	Eng	ine s	sche	me	ER-3	34221	: Cale	ndar	•				
Ma	in	Clie	ent J	lob	s	Files	In	io (	Calendar				
•	Ci	чен	ь 20	)17	p.	►			понеділ	ок		вівторок	середа
	I B	С	Ч	П	С	Н				Грудень, 3	26	27	28
26	5 27	28	29	30	31	1							Engine scheme ER-34221
2	2 3	4	5	6	7	8							
9	9 10	11	12	13	14	15							
10	5 17	18	19	20	21	22					2	3	4
23	3 24	25	26	27	28	29					-		
- 30	) 31	. 1	2	3	4	5							Engine scheme ER-34221
lob	Stat												Engine scheme ER-34221 (DTP)
100	วเสเ	us.									$\odot$	C	() ()
*All*						-					9	10	11
													Engine scheme ER-34221
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											1		

### **Calendar block colors**

Like the jobs they represent, calendar blocks can have different colors, depending on the statuses of respective jobs:

- Green the job is *not completed* yet, but its *deadline is in the future*.
- Blue the job is not completed and due today.
- Red the job is not completed and overdue (its deadline is in the past).
- Grey the job is canceled.
- Pale Pink the job is completed.
- Pale green the job is Heads-Up.
- Pale Orange the job is On Hold.

### 7.2. 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 the **Client Jobs** tab of the **Project** window. The major differences are:

- The 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 the **Client Jobs** window click the **Client Jobs** icon in the **Projects** section of the **Ribbon**.

		Prospects	Clients	Projects			
		6					
	Project	Client Jobs					
Ρ	rojects: Cli	ent Jobs 👻					
	<u>E</u> dit	Status: *	All*		•	Invoiced: *All*	•
*	Code	Job Nan	ne		Project	Assigned	Deadline
	J-LIGRA0	Content translat	tion	Marketing	booklet	17.03.2016 00:00	22.03.2016 18:00
	J-DFC000	1 H-210 smartpho	one 1st pa	HIGHTECH	PRO H-210 smartphone	09.11.2016 00:00	06.01.2017 18:00

#### **Filtering Client Jobs**

Use the Status filter drop-down list to display only Jobs with a specific status.

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

#### **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 in a different background color:
- Orange background On Hold status
- Green background Heads-Up status
- Grey background *Canceled* status

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

**NOTE:** You can change the colors on the <u>Colors: Status</u> tab of the User Settings menu in the Backstage view.

## 7.3. Creating a project

Projects are created from two areas of TO3000 3D+:

A: On the **Main** tab of the **Project** window by clicking the **New Project** button. You will be prompted to select a client when using this option.

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

Internet	Security Tech	nologies: Pr	ojects 🔻									
Main	Contacts	Marketing	p Prices	Quotes	Projects	Client Jobs	Invoices	Credit Not	es Payments	Refunds	Account	Files
Ne	W	<u>E</u> dit	<u>D</u> elete	Sta	atus: *All*				•			
* Edit P	roject										x	
-			Client	t: <b>Interne</b>	t Security	Technologies	;		Code:	0035		a
_			Client PM	1: Charlot	tta Rintala	None						
Det	tails Custo	m Fields										
	Projec	t Name: 🚦	SH technol	ogy								
	Info	rmation:	SSH techno	ology han	đbook						*	
											-	
	Project	Folder: D	):\Business\	Projects\0	035 SSH te	chnology					<b>&gt;</b>	
Ti	imeline:		=Now				=Assigned		=Deadline	=1	Now	
	Assigned:				Deadline	2:			Completed	:		
	06/09/2016	12:45			18/10/20	16 18:00			10/01/2017 15	:11		
	(23	32 days ago	D)			(190 days ag	30)		(106	days ago)		
K							Spe	cial Status:	None		•	
		RTF Temp	lates: Pro	ject - Sim	ple Templat	e.rtf			-	à+🔗 🛛		

#### **New/Edit Project window**

A Project Code is automatically assigned to each Project in TO3000 3D+. All Project Codes are unique and cannot be edited.

Name - the project's name can be up to 150 characters long.

Information - any general information relevant to this project in the form of a plain text note.

**Client PM** - one of the client's contacts, responsible for this project on the client side. The person selected here will be set as the default client's PM for all new client jobs in this project. See the <u>Contacts List</u> topic for details on adding and editing contacts.

**Timeline** - the timeline of a project in TO3000 3D+ includes the assigned and deadline dates, and the date when the project has been actually completed. The Deadline and Completed values are taken into account when the program determines the status of projects (like due today, overdue and so on).

**Project Folder** — this part of the project's profile can be used to store and access the project's work files. Click the Folder button on the right side of the field to open the folder in TO3000 Explorer (creating it if it does not exist yet).

**Special Status** - these are used when project needs to be put *on hold*, when you create a *heads-up* (or potential) project or *cancel* a project. Projects with *on hold* status have their deadlines undetermined, thus *on hold* projects cannot become overdue. Projects with *heads-up* status cannot be set as completed, since *heads-up* status assumes that work has not yet started. A project can also be *cancelled*. A cancelled project has no deadline, since the status implies that it was abandoned.

**Note:** All project data except project code and client can be edited at any time later. See the <u>Project Profile</u> topic for details.

**Note:** Job data, like volumes, pricing and so on is added to an existing project in the form of client jobs. See the <u>Creating Client Jobs</u> topic for details.

You can save project data in a printable file or print it with the help of the *RTF templates interface*. You can also e-mail the template-generated document via the <u>Mail Sender</u>.

Templates for printing project data can be edited with the help of User Settings in the Backstage view. Click the **Templates** section to quickly access all template folders. Templates for printing projects are saved in the *C:\Users\Public\Documents\AIT\TO3000, Version 3D\Templates\PROJECTS\* folder.

## 7.4. Creating client jobs

Client jobs can be created in the following areas of TO3000 3D+:

- A: The Client Jobs tab of the Client window by clicking the New button (only in Without Projects mode).
- **B: The Client Jobs** tab of the **Project** window by clicking the **New** button (only in With Projects mode).

0027, Tax policy in EU: Clie	ent Jobs 💌									
Main Client Jobs	Aain Client Jobs Files Info Calendar									
<u>N</u> ew <u>E</u> di	t <u>D</u> elete		St	tatus: *All*		▪ Invoiced: *All*				
Edit Client Job	lit Client Job									
	Client: Globa	Concepts Unive	ersal		Code:	J-GCU0001				
	Project: 0027,	Tax policy in EU	I		Client Ref.:					
Clie	ent PM: Aki Na	akasawa			Client PO:					
Details Instructions	Work Notes Cu	stom Fields Pro	oject Folder	Alerts						
Name:	Tax policy in EU tra	nslation								
Group:	Translation			•						
Service:	English => Swedish	1		•						
Volume:	24555	words	ords			ExactSpent				
Price:	29.00	per unit		Prices		Client Currency: JPY				
	Total: 712 095.00	per une				1 JPY = 0.0083 EUR				
Project Folder:	D:\Business\Projects\	0027 Tax policy i	In EU\			Create Invoice				
Timeline	: =N	ow		=Assigned	=Dead	dline =Now				
Assign	ed:		Deadline:		🗆 Comp	leted:				
14/12/	2017 00:00	•	29/12/201	7 18:00						
	(6 days ago)			(in 9 days)						
				Specia	al Status: None	•				
RTF Te	emplates: Client Job	- Template - Eng	glish.rtf		•	▶ 🗳 ڬ				
					ОК	Cancel				

### **New/Edit Client Job window**

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

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

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

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

**Group** - the group of services. All services in TO3000 3D+ are broken into groups. You can select any of the groups of services available. To add or edit a group of services please open **Business Settings** in the **Backstage** view, and select the <u>Groups of Services</u> section.

**Service** - each group of services contains a separate list of services. Before selecting a service, select the group of services first. To add or edit a service please open **Business Settings** in the **Backstage** view, and select the <u>Services</u> section.

**Volume** - the job's volume can be indicated in a number of units (characters, words, lines, hours and so on). To add custom units please open **Business Settings** in the **Backstage** view, and select the <u>Volume Units</u> section.

You can also use the 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 the CATCount tool to quickly enter the required volume. See the <u>AnyCount</u> and <u>CATCount</u> topics for details.

If you have ExactSpent installed, you can use it to track the time you spent performing this job, and automatically update this data in TO3000. See the topic <u>Integration with ExactSpent</u> for more details.

**Price** - the price can be entered manually or copied from the client's individual price-list. To copy a price from the price-list click the **Prices** button. The price for a matching service, group of

services and unit combination will be copied. Click the button to copy the current price to this client's price list. You can set a fixed price for the client job (which will not be multiplied by the job volume) by selecting the **flat fee** option in the drop-down list next to the price field. Select the **free** option in the same drop-down list to set the job total to zero. The price and volume in a free job must not necessarily be zero.

If the client currency differs from your base currency, the **Currency Exchange Rate** button will be available. By clicking this button, you may change the *currency exchange rate* used in this *job*. Note that this button does not change the general exchange rate stored in your TO3000 database. To change the exchange rate for all future jobs go to the <u>Exchange Rates</u> tab of the Business Settings.

**Job Folder** - when creating client jobs it is often necessary to work with 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 the **New/Edit Client Job** window.

Create Invoice button - immediately creates an invoice for the job being edited.

**Timeline** - the timeline of a client job in TO3000 3D+ includes assigned and deadline dates, and the date when the client job has been actually completed. The Deadline and Completed values are taken into account when the program determines the status of client jobs (like due today, overdue and so on).

#### 193 Translation Office 3000 Help

**Special Status** - these are used when the client job needs to be put *on hold*, when you create a *heads-up* (or potential) job or to *cancel* a job. Jobs with *on hold* status have their deadlines undetermined, thus *on hold* jobs cannot become overdue. Jobs with *heads-up* status cannot be set as completed, since *heads-up* status assumes that work has not yet started. *Cancelled* jobs can not be completed either, since the status implies that the job was abandoned.

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

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

**Custom Fields** - client job 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, print it, or send it via Email with the help of the *RTF templates interface*.

Templates for printing job data can be edited with the help of **User Settings** in the **Backstage** view. Click the **Templates** section to quickly access all template folders. Templates for printing client jobs are saved in the *C:\Users\Public\Documents\AIT\TO3000*, Version 3D\Templates\CLIENTS\Jobs\folder

## 8. Wizards

Wizards are special modules that allow users to quickly create new records in the database.

Wizards can be accessed via the drop-down menu in the upper-left corner of the main window.



## 8.1. Client Wizard

The New Client Wizard guides you through the user creation process in 8 steps. After entering the required information

1. Enter the Client's name.

2

2. The client's code is generated from the name. You can confirm or Edit it.

Ent	ter new Client's code.
	This code will be used in Client's folder name, as well as in some invoice codes. You will be able to change this code later if needed.
	Client Code:
	TESCL
	(maximum 15 characters)

3. Enter the client's Postal address data (street address, city, country, zip code). This and all subsequent steps are optional and can be skipped.

4. Enter the contact details (e-mails, phones, fax, Web-site).

5. Adjust the financial details (client's currency, VAT number, payment and invoicing terms)

er new Client's financia (optional)	I details.	/
Currency:	EUR V	
Payment Terms:	From Invoice Date	
	● Within 30 ¥ days	
	On day 10 of the same month	
	On day 10 of the next month	
	On day 10 of the month following next	
	O Unknown/Other	
Vat Number:	(maximum 20 characte	ers)
Invoicing policy:	Invoice Client Jobs	
	Immediately after completing job	
	<ul> <li>Only after total of invoiced jobs reaches</li> <li>0,00</li> <li>Wait accrual no longer then</li> <li>0 days</li> </ul>	
	<u>B</u> ack <u>N</u> ext <u>C</u> an	cel

#### 6. Confirm or adjust the client's locale settings.

#### **Clients local settings**

You can specfy client's local settings if they are different than your own. These settings will be used in document templates.

Generation of RTF fi	les:	Custom Values				
		Defau Custo				
Negative Currency Format:	-1,1	•	Samples:			
Decimal Symbol:	,	•	Positive Number:	123 456 789,00		
No. of digits after Decimal:	2		Negative Number:	-123 456 789,00		
Digit Grouping Symbol:		•	Short Date:	06.06.2018		
Date Separator:		•	Long Date:	6 червня 2018 р.		
Short Date Format:	dd/M	IM/yy	уу 🔻			
Long Date Format:	d MM	1MM	уууу' р.' 👻			

- 7. Enter any General information about the client.
- 8. Enter data into the client's custom fields (if any). Click Finish to create the new client.

## 8.2. Contact Wizard

This wizard can quickly add new contact person records to Clients. The process has 2 steps:

1. Select the client for which you want to create a new contact person record.

Select a client.			**
New contact will be added to	o the Client which you	select.	1
Enter text to search		✓ Find Clear	r
Client			
Digital First Concierge			
Digital Network Entertaiment			
Future Unified Resources			
Global Concepts Universal			
Global Interactive Resources			
Intelligent Interworks			
Internet Unified Corp.			
Key Outsourcing Studios			
Massive Archway, Inc			
Network Community Technologies			
The Lightning Graphics			
Translation Designs			
🗰 📢 🖣 8 of 14	▶ ₩ ₩ 2		
New Client Wizard			
	<u>B</u> ack	Next	<u>C</u> ancel

You can open the New Client Wizard from this window as well.

2. Enter the personal and contact data of the contact. You can also add a photo.

	Client: Intell	igent Interworks		
		Salutation:	-	
		Name:		
		Title:		
		E-Mail:		
		E-Mail 2:		
		Phone:		
7	Сору	Phone 2:		
0	Paste	Phone 3:		
×	Delete	Phone 4:		
2	Load	Fax:		
<u>_</u>	Assign From Camera	Notes:		^
	Save As			

## 8.3. Service Wizard

This wizard can quickly create new services and add their base prices to the price lists. the process consists of 3 steps:

1. Create a new Service group or select an existing group.

Select group for this service			
Enter or select a group for this se	ervice.		
New Group of Services			
Group Name:			
<ul> <li>Existing Groups of Services</li> </ul>			
Consulting DTP Tasks Editing Other Testing Translation			
	<u>B</u> ack	Next	<u>C</u> ancel

2. Enter the name of the new service. Check against the list of existing services to avoid duplicates.

exists in Projetex database.	Use Existing Services list to check if this is so.	4
Service Group:		
Consulting		
New service:		
Existing services:		
Cultural Assessment		
Multilingual Copywriting		

3. Set the General price of the service (if necessary), selecting the currency, unit, and per-unit price for each.

Enter service data You can add price list (client and f	reelance) for the selected service.
Service Group:	Consulting
New service:	test
Add general price record for C	lients
Units: words Price: 0,0 Currency: EUR	▼ D ▼ (per unit) ▼

## 8.4. Quote Wizard

This wizard can quickly create new quotes. The process has 3 steps:

1. Select the client for which you want to create a new quote.

Enter text to search	V         Find         Clear	^
lient		
yber Computation Technologies, Inc		
efinition Designs		
igital First Concierge		
igital Network Entertaiment		
nigma Server Technologies, Inc		
uture Unified Resources		
lobal Concepts Universal		
lobal Interactive Resources		
telligent Interworks		
ternet Security Technologies		
ternet Unified Corp.		
1 ≪1 ◀ 1 of 21 ► ► ₩ ₽		
New Client Wizard		

You can open the <u>New Client Wizard</u> from this window as well.

2. Enter the basic quote data (name, client PM, and timeline)

Client:	Cyber Computation Technologies,	Inc		
Client PM:	- Not Selected -			
Draft Project:				
Draft Timeline:				
			=Assigned	ł
	Assigned:		Deadline:	
	06/06/2018 16:37		06/06/2018 18:00	]-
	(when)		(when)	
	06/06/2018 16:37		06/06/2018 18:00 (when)	]-

3. Create the quote's Draft Jobs (see <u>Draft client Job</u> for details). Select the Discounts, markups and taxes, if any.

Add draft jol Add draft	<b>b(s)</b> t client jobs and quote the	ir volumes and prices.		×						
New	<u>E</u> dit <u>D</u> e	lete								
* Name	Group of Ser Service	Unit Volume	Price	Pricing Total	New Dra	ft Client Job				? ×
*		0	0,00	per uni 0,00	Details	Count Notes	Audit			
						Name:				
						Group:	-None-		*	
						Service:	-None-		~	
						Volume:	0	-None- v	AnyCount	CATCount
10 41 4 1 of	1 ▶ ₩ ₩ 2			>		Price:	0,00	per unit 🗸	Prices	
Discount/M Discount/Ma Net Job	Markup: - None - (0,00% arkup 2: - None - (0,00% s Total: 0,00	) v 0,00	Tax: - None - Tax 2: - None - Quote Total: 0,00	(0,00%) <b>v</b> 0,00 (0,00%) <b>v</b> 0,00			Total: 0,00 Currency: EUR			
		B	ack <u>F</u> inish	<u>C</u> ancel					C	OK Cancel

## 8.5. Job Wizard

This wizard can quickly create new Client Jobs. The process has 2 steps:

1. Select the client for which you want to create a new Job.

Select a Client.	林
New Job will be added to the Client which y	ou select.
	•
Enter text to search	V Find Clear
Client	
Cyber Computation Technologies, Inc	
Definition Designs	
Digital First Concierge	
Digital Network Entertaiment	
Enigma Server Technologies, Inc	
Future Unified Resources	
Global Concepts Universal	
Global Interactive Resources	
Intelligent Interworks	
Internet Security Technologies	
Internet Unified Corp.	
Key Outsourcing Studios	
	*
New Client Wizard	
<u>B</u> ack	<u>N</u> ext <u>C</u> ancel

You can open the <u>New Client Wizard</u> from this window as well.

2. (Only in <u>With Projects mode</u>) Select one of the client's existing projects.



Once you click **Finish**, the <u>New Client Job</u> window will open and you will be able to enter the other details of the job.

## 8.6. Invoice Wizard

This wizard can quickly create new Invoices. The process has 2 steps:

1. Select the client for which you want to create a new Invoice.

Select a client. Select a client to whom this invoice will be sent.	ķ
Enter text to search V Find Clear	^
Client	
Cyber Computation Technologies, Inc	
Definition Designs	
Digital First Concierge	
Digital Network Entertaiment	
Enigma Server Technologies, Inc	
Future Unified Resources	
Global Concepts Universal	
Global Interactive Resources	
Intelligent Interworks	
Internet Security Technologies	
Internet Unified Corp.	~
₩ ◀ ◀ 6 of 20 ► ₩ ₩ ₴	
New Client Wizard	
Back Next Cancel	

You can open the <u>New Client Wizard</u> from this window as well.

Wizards	208
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2. (Only in <u>With Projects mode</u>) Select whether you want to add uninvoiced Jobs from all of the Client's projects, or from a specific project.



Once you click **Finish**, the <u>New Invoice Window</u> will open, with all uninvoiced jobs added, and you will be able to enter the other details of the Invoice.

## 9. Calendars

**Calendars** for *clients* and *projects* in TO3000 3D+ can be used to obtain a visualized representation of work processes. Calendars provide a comprehensive view of project and job intensity at any given moment.

The following calendars are available in TO3000 3D+:

Clients	A calendar of projects for the selected client. — Calendar tab of Client window
Projects ( <i>With Projects Mode</i> only)	A Calendar of client jobs for the selected project. — <u>Calendar</u> tab of Project Window
Calendars section	<ol> <li>For With Projects Mode: A Calendar of all projects.</li> <li>A Calendar of all client jobs.</li> </ol>

### Calendar Section

The **Calendar** section displays all projects and jobs in the visual format of *calendar blocks*. Each block stretches across the calendar from assignment until completion, or until the deadline if the job/project has not been completed yet.

The section has two different calendars in it, accessible from the **Ribbon**: a **Calendar of Projects**, and a **Calendar of Client Jobs**.

Each calendar displays the Jobs or projects for all clients. Double-clicking a calendar block opens the Edit window for the corresponding job or project.



#### Settings for the Calendar view

The following settings for the calendar page are available after opening a calendar:

**Basic navigation -** the Ribbon displays icons for moving backward and forward in the calendar by a single interval, and quick navigation to Today.

**Viewed period** - the Ribbon displays icons for selecting the time interval to be viewed (day, work week, week, month, year), as well as the special Timeline View.

**Note:** In Day View and Work Week View, jobs shorter than one day are displayed across the rows representing hours, while longer jobs are displayed above the hour-rows.

**Grouping and special options -** the Ribbon displays icons for changing the layout of the viewed interval (**Group by None, Group by Date, Group by Clients**), and special options for Weekend or Off hours display.

**Mini-calendar** - the mini-calendar on the left displays the month and date currently viewed. Click a date to switch to it. To move to a different month, click the greyed-out dates, the Back and Forwards buttons in the month header, or the header itself. Click and drag across multiple days to display them all.

Calendars	Opti	ions														Q	Sear	ch				•					Off	9
<ul> <li>•</li> <li>•&lt;</li></ul>					1	8		5		7		31	36	5	6	5	3	0 1	0 0 31		2	1						
Backward Forward Go Tod	to Zoon lay In	n	Zoor Out	n	Da Vie	ay ew	۱ We	Nork ek Vie	w	Week View	M	1onth /iew	Yea Vie	r v	Timeli View	ne /	Gro by N	up Ione	Grou by Da	ip ate	Grou Reso	p by urce		Comp Week	press kend	Wo He	orking ours	
Calendar of Projects Calendar	of Client Job	s •																										
♦ Березень 2017 р. ▶	H1 2017	Пн	Вт	Ср	Чт	Пт	Сб	нд г	٦н	Вт Ср	Чт	Пт	Сб Н,	а П	н Вт	Ср	ЧтГ	т се	б Нд	Пн	Вт	Ср	Чт	Пт	Сб	Нд Г	Ін В	г Ср
пвсчпсн								1	2	3	4 5	5 6	7	8	9 10	11	12	13	14 15	16	17	18	19	20	21	22	23	24 25
27 28 1 2 3 4 5	Ciucan																	Med	l. insur	ance	proo	frea	d					
6 7 8 9 10 11 12	Січень																Virt	ual Re	ductio	n En	aine -	sche	emati	ic				
13 14 15 16 17 18 19								0	•	OC		$\overline{\mathbf{O}}$	0			$\overline{\mathbf{O}}$	$\odot$	$\bigcirc$		$\overline{\mathbf{O}}$	$\overline{\mathbf{O}}$	•	$\overline{\mathbf{O}}$	$\odot$	•	$\odot$		70
20 21 22 23 24 25 26				1	2	3	4	5	£	7	8 9	9 10	11	12	13 14	15	16	17	18 19	20	21	22	23	24	25	26	27	28
27 28 29 30 31 1 2	Пютий												M	ed. i	nsuran	ce pr	oofrea	ad										
3 4 5 6 7 8 9	Лютии													Mai	rket re	view ·	DTP											
Job Status				$\odot$	$\overline{\mathbf{O}}$	$\overline{\mathbf{O}}$	$\odot$	$\odot$	$\odot$	OG		$\overline{\mathbf{O}}$				$\overline{\mathbf{O}}$	$\odot$	$\Theta$		$\overline{\mathbf{O}}$	$\odot$	$\odot$	$\odot$	$\odot$	$\odot$	$\odot$	$\Theta \subset 0$	5
Job status.				1	2	3	4	5	e	7	8 9	9 10	11	12	13 14	15	16	17	18 19	20	21	22	23	24	25	26	27	28 29
*All* •	Березень	2011													Ma	irket i	review	- DTP	,									
	березень													Н	-210 in	struc	tion -	correc	ctions									
				(7)	( - )	(-)	(-)	(-)	( - )	(-) (-	) (-)		(-) (	-) (	-) (-)	(-)	(-)	( - ) ( - )	-) (-)	(-)	(7)	(-)	(-)	(-)	(-)	(-)	(-) (	+) (+

#### Job/Project block colors

As well as the jobs/projects they represent, job/project calendar bars can have different colors, depending on the statuses of respective jobs/project:

- Green job/project is not completed yet, but its deadline is in the future.
- Blue job/project is not completed and due today.
- Red job/project is not completed and overdue (its deadline is in the past).
- Grey job/project is *canceled*.

Pale Pink — job/project is completed.

Pale green — job/project is Heads-Up.

Pale Orange — job/project is On Hold.

NOTE: To customize status colors in the **Backstage** select the User Settings section and click Colors: Statuses.

Use the **Job Status** filter to display only the Jobs/Projects with a specific status (Completed, Overdue, On hold, etc.).

## 10. Reports

### 10.1. Static reports

Static report templates are found in all tabs of the **Reports** section, except the 3D tab.

Each icon opens a specific template and automatically loads the required information into it before displaying it on screen.

Some reports require you to Select Conditions - choose the specific information to be entered into the template (e.g. a specific client).

Static reports that cover a certain time interval are affected by the Global Date Filter.

Static reports are displayed in a "ready to print" page-by-page view and the buttons just above the displayed report allow you to navigate the pages more easily and adjust their dimensions.



**Print** - sends the report as it is shown to the printer.

**Page settings** - allows you to adjust the dimensions, orientation and margins of the pages of the displayed report. Applying the changes often requires re-selecting display conditions.

Thumbnails - toggles a sidebar that displays thumbnails of all the pages in the displayed report.

**Zoom Controls** - set the portion of the reports visible on screen at a time.

**Page navigation** - Quickly switch between adjacent pages, or jump to the start or end of the report.

**Refresh** - generate the report again to choose different conditions or keep the report up to date with the database.

New custom report templates will appear in the Custom tab.

## 10.2. Dynamic reports

The **3D** tab gives access to a number of dynamic reports: sets of fields that can be dragged and dropped onto a special "Pivot Grid" to quickly create an exportable report table.

Client Payments 💌							
<prefilter empt<="" is="" td=""><td colspan="6"><prefilter empty="" is=""></prefilter></td></prefilter>	<prefilter empty="" is=""></prefilter>						
Linked (EUR) 💽 Not Linked (EUR) 🝸 Month 🝸 Quarter 🝸 Year & Month 🝸							
Payı Total -	Payı Total Year 🔻 🔽						
	2017		2016	:			
Client 🔺 💌	Payments	Total (EUR)	Payments	Total (EUR)			
Cyber Computa			2	5000,00			
Definition Desi	1	539,00					
Digital First Co	1	462,00	1	44,35			

### Prefilter

Use the prefilter to decide which information to include in the report to begin with. Click the Prefilter button to bring up the Filter Builder.

### **Pivot Grid**

The pivot grid is the framework into which the fields can be dragged to customize the table.

Click the down arrow button in a field to select the entries which will factor into the report by the values of that field.

ayı 🕤	Total 👻	Year 🔺 🔄	]					
🔳 (S	how All)							
20	2014							
20	2015							
20	16							
20	17							
	OK	Cancel						
111								

The grid consists of five areas:

- The Field List contains the fields that are not displayed in the main window. Right-click a field and select Hide to send it to the Field List. Display the Field list by right-clicking just above the table and selecting "Show Field List".
- Fields in the Filter Area (red box) do not appear in the table, but can be used for quick filtering.
- Fields in the Data Area (blue box) display their values in the cells of the table. If there is more than one field in the Data Area, they appear as sub-columns of the field in the Column Area.
- Fields in the Column Area (green box) split the data into columns according to their values. If there is more than one field in the Column Area, the columns are grouped with a left-to-right hierarchy and can be expanded or collapsed by clicking the arrow next to the left field's value.
- Fields in the Row Area, (yellow box) split the data into rows according to their values. If there is more than one field in the Row Area, the rows are grouped with a left-to-right hierarchy and can be expanded or collapsed by clicking the arrow next to the left field's value.

Project Manager 🔄 Service 💌 Currency 💽 Volume (words)					
Jobs 📉 Total (EUR) 💌 Year 🔺 💌 Quarter 🔻 💌					
	- 20	16		_	
	4		3		2
Client 🔺 💌	Jobs	Total (EUR)	Jobs	Total (EUR)	Jobs
Cyber Computation T	1	750,00			
Definition Designs					

### Sorting

By default, the table is sorted by the fields in the Row and Column Areas. Click the fields to switch between ascending and descending sorting.

You can also sort the table by the value of a specific row or column by right-clicking the column's header and selecting **Sort... by This Row/Column.** 

Select **Remove All Sorting** to return to the default sorting method.

Jobs 🔄 Total (EUR) 🔄	Drop (	Column Field	ls Here	
	Grand	Total		
Client 🔻 🚽	Jobs	Total (EUR)	1	
The Illustrative Designs	6	18 865	,00 🗸	Sort "Client" by This Column
The Lightning Graphics	6	11 102	,63	Remove All Sorting
Network Community Tech	3	7 513	,00	

## 11. Knowledgebase

## 11.1. Info tab

The Knowledgebase is a repository of guides, manuals, and other reference material.

The Info tab of the Knowledgebase consists of two panes.

The left pane displays all the topics and articles in the knowledgebase, and the right pane displays the contents of the currently selected topic or article.

New Topic creates a new topic in the knowledgebase.

New Article creates a new child article in the selected topic.

**Edit** allows the user to change the Subject and Information in the selected topic or article. Note that the information can also be edited directly in the right pane.

**Delete** removes the currently selected topic or article. note that a topic can not be deleted if it has at least one article inside it.



Click the arrow next to the topic symbol to display or hide the articles inside the topic.

To move a topic up or down in the knowledgebase, or to move an article inside it's topic, rightclick and select **Move Up** or **Move Down**.

You can also apply basic formatting to the contents of a topic or article (font, size, style, color, etc.) and paste images into it.

## 11.2. Files tab

The TO3000 knowledgebase has a dedicated folder where all useful reference files can be stored.

By default, the knowledgebase folders are found in C:\Business\KB.

The Files tab allows for easy management of such files. The tab shows the folder tree for the knowledgebase folder and the content of the currently selected sub-folder.

New subfolders can be created by right-clicking any existing folder in the tree view and selecting "New folder"

Knowledgebase: Team -						
Info Files						
Explore D:\Business\KB\Team						
	🚱 🐹 🗇 🛍 🗶					
🔑 KB\Team	Name					
New Folder Rename Delete	■ Sub 1 ■ Capture.PNG ■ Sisulizer-QuickStartGuide.pdf					
Ascending Descending						

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.

## 12. Mail sender

Use the TO 3000 **Mail Sender** to quickly create template-based documents and send them to your clients and experts without using an outside e-mail client.

The Mail Sender is accessed via the **Send Mail** button near the bottom right corner of the price lists and the **New/Edit** windows of **Quotes**, **Projects**, **Jobs**, **Payments** and other documentation.

The Mail Sender opens with the template-based document already attached, the subject line containing the name of the table and attached file, the default e-mail template for this type of document applied, and addressed to the client/expert associated with the document.

You can select a different email template or write your own text in the body, change the address and subject, add CC addresses, attach more files and set the letter's priority.

Click **Send** to send the email to all the selected addresses.

Nend Mail		_ <b>D</b> X
T	To: <u>C</u> C: Subject: Template:	Bernardo Fernandez <bernardo@unlimited-concepts.es>  Invoices (Attached File: I-UNLICON0002.RTF) Invoice to client - 2</bernardo@unlimited-concepts.es>
Attachments I-UNLICON0002.RT	F	Font:       Font Size:         Image: Constraint of the second
🖉 Attach a fi	ile	Priority: Normal
		Send Cancel
# 13. File management

## 13.1. Folder structure

#### **Business Folder**

TO3000 3D+ automatically creates and maintains a file storage 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 the *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 the Folders section;
- 3. Click the **Change** button.

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

#### Different folder types

Business folder contains three main sub-folders: The Clients, Projects, and Prospects folders.

**Client folders** (a separate folder for each client) are stored in the *Clients* folder. Each folder is named with the client's **Code**. Please refer to the <u>Client folder</u> 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 <u>Prospect Folder</u> 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 the unique *project code*, and, optionally, the project name. Please refer to the <u>Project folder</u> 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 the unique *client job code*.

These folders, as well as their subfolders are created automatically when opened in the TO3000 explorer for the first time, or when the first file is saved to them.

## Automatic folder creation

With the help of the 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 a certain folder type, select the **Automatic Folder Creation** checkbox on the tab of required folder in the **Folders** section of the **Advanced settings** window.

Every time a *Client* or *Project* folder is created by TO3000 3D+, any folders or subfolders added to the respective tab of the **Folders** settings will be created in that folder automatically.

To disable creation of customized folders, clear **Automatic Folder Creation** on the corresponding <u>Folders tab</u>.

## 13.1.1. Client Folder

The Client folder is a storage location for all files relevant to a particular client. This folder is created with the help of the <u>Main</u> and <u>Files</u> tabs of the <u>Client window</u>.

The following subfolders are created automatically in the *Client* folder, depending on the document being saved:

- Prices contains all printable price-lists for the current client.
- *Quotes* contains all printable quotes for current client. Each quote has it's own sub-folder, named with its code.
- Invoices contains all printable invoices for current client.
- Credit notes contains all printable Credit notes for current client.
- Payments contains all payment printouts of the current client.
- *Refunds* contains all printable refunds for current client.
- Jobs contains all printable documents related to jobs. In *Without Projects Mode* the Jobs folder contains all of the client's jobs files. See more information at <u>Client Jobs Folder</u>.

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

## 13.1.2. Prospect Folder

Prospect folder is a storage location for all files relevant to a particular prospect. This folder is created with the help of the <u>Main</u> and <u>Files</u> tabs of the <u>Prospect window</u>.

The following subfolders are created automatically in the *Prospect* folder, depending on the document being saved:

- Prices contains all printable price-lists for current prospect.
- *Quotes* contains all printable quotes for current prospect. Each quote has it's own subfolder, named with its code.
- Invoices contains all printable invoices for current former or inactive client.
- Credit notes contains all printable Credit notes for current former or inactive client.
- Payments contains all payment printouts of the current former or inactive client.

• Refunds - contains all printable refunds for current former or inactive client.

• Jobs - contains all printable documents related to jobs. In *Without Projects Mode,* the Jobs folder contains all of the former or inactive client's jobs files.

Each prospect folder can contain custom subfolders which will be created automatically together with a prospect folder. These subfolders can be specified on the <u>Folders section</u> of the **Advanced settings** window.

## 13.1.3. **Project Folder (With Projects Mode only)**

The 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 the **Project** window. It is created automatically when any project-related document is saved.

By default, a project's folder contains at least three subfolders:

•Incoming (where you can store the files sent to 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 the **Advanced settings** window.

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

For consistency, the name of the project's folder is the same as the *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 in the **Folders section** of the Advanced settings window. The name of each *Project* folder can consist of the following components:

#### Project code (obligatory)

#### Project name

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

## 13.1.4. Client Job Folder (Without Projects Mode only)

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

By default, a Client Job folder contains at least three subfolders:

Incoming (where you can store the files sent to 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 the **Advanced settings** window.

All client jobs are stored in the clients' folders.

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

## 13.2. File manager

## 13.2.1. 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.

Digital Fi	rst Concierge	:: Files										
Main	Contacts	Marketing	Prices	Quotes	s Projects Client Jobs Invoices Credit Notes Payments Refunds Account Fi							Files
Explore D:\Business\Clients\DFC\Payments												
					<b>()</b>	0 🗅 🗶						
🐌 Clier	nts\DFC				Name				S	ize Da	itetime	
- 🕕 N	/larketing				P-DFC0001.rtf 19 KB 14.07.2017				.07.2017 16:29	9		
Refresh All     Copy								ру				
		Shortcuts			Explore D:\Business\Projects\0021 HIGHTECHPRO H-210 smartphone specification							
Client FTP					<b>@</b>   %	0 🗅 🗙						
🗀 Clier	nt Projects				Name				S	ize Da	atetime	
- 🗓 I	HIGHTECHPF	RO H-210 sm	artphone	specifica	🐌 Incomi	ng						
i 🙂 L	ocalization	of H-210 inst	ruction		📕 Outgoi	ng						
					Work							
					[₩]0021.rt	f			22	KB 14	.07.2017 16:2	8

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.

## 13.2.2. Shortcuts and Related Folders

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

To quickly open a shortcut to the currently opened folder, select it in the **shortcuts** list in the bottom-left of the window.

The Client folder shortcuts are: the **Project** folders of this client's projects, and the client's FTP connections.

The Project folder shortcuts are: the **Client** folder of the selected project, and the client's 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 "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.

Edit Client Job		x
Client: Digital First Concierge Project: 0021, HIGHTECHPRO H-210 smartphon	Code: Code: Code:	J-DFC0001
Client PM: Ivan Nikitin	Client PO:	
Details       Instructions       Work Notes       Custom Fields       Project Folder       Ale         Folder:       Related         D:\Business\Projects\0021 HIGHTECHPRO H-210 smartphone specifi       Client Folder         Image: Size Datetime       Name       Size Datetime         Incoming       Image: Size Datetime       Na         Incoming       Image: Size Datetime       Image: Size Datetime         Image: Size Datetime       Image: Size Datetime       Image: Size Datetime         Image: Size Datetime       Image: Size Datetime       Image: Size Datetime         Image: Size Datetime       Image: Size Datetime       Image: Size Datetime         Image: Size Datetime       Image: Size Datetime       Image: Size Datetime         Image: Size Datetime       Image: Size Datetime       Image: Size Datetime         Image: Size Datetime       Image: Size Datetime       Image: Size Datetime         Image: Size Datetime       Image: Size Datetime       Image: Size Datetime         Image: Size Datetime       Image: Size Datetime<	rts Folders: older of Digital First Concierge ame Size D  P-DFC0001.rtf 19 KB 1	• Datetime 4.07.2017 16:29
RTF Templates: Client Job - Template - English.rtf	•	
	ОК	Cancel

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

#### 13.2.3. FTP folder access

TO3000 3D+ features a built-in *FTP client*, which can be used to quickly access the *FTP folders* of clients to upload or download workflow files.

To access the FTP client:

1. Open the Files tab of any client or project.

2. In the **Shortcuts** field select the **Client FTP** option.

Shortcuts	FTP: 😐 Co	onnect	Digital First Concierge					
💼 Client FTP	Name		Size	Date				
Local Folders								
Client Projects								

#### FTP access interface

- **The FTP** indicator indicates the connection status. A red indicator is shown if there is no connection. The indicator turns green when a connection is active.
- Click the Connect/Disconnect button to connect/disconnect the currently selected FTP server in the nearby drop-down list.
- Click the Manage Connection button
   to create a new FTP connection or edit/delete
   the currently selected FTP connection.

## **Creating a new FTP Connection**

In order to connect to the FTP folder you will need to create an **FTP Connection** for this folder, which implies entering the 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 the Manage Connections button

2. Select New connection ... in the menu which appears:

3. Enter the name of the new connection, the FTP server's address, the user name (FTP login) and password (TO3000 3D+ will memorize your password)

2

4. Select any additional settings if you need to use them (Use passive transfer, FTP over SSL/TLS, Keep connection alive).

5. Click the **OK** button to create this FTP connection.

## **Connecting to FTP**

Once the FTP connection has been created, it can quickly be activated with the help of the **FTP connections** drop-down list.

1. Select the required **FTP Connection** in the drop-down list to connect to that FTP server.

2. Click the **Connect** button to display the contents of FTP in the field below. The list and the Manage Connection button will become inactive while you are connected.

## 14. Multiple currencies support

In TO3000 3D+ you can assign an 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 3D+.

**The** *Base currency* is the currency in which your make all internal accounting records, i.e. balance, taxes, business expenses etc. In most cases, it is the currency of your country.

**The** *Client currency* is the currency in which you produce invoices for your client and receive payments from your client.

In TO3000 3D+ 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 accounting in your *base currency*, while still keeping the records in other currencies.

To make these parallel records possible, you only have to enter the 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.

## 14.1. Base currency

The *base currency* represents your local currency, in which you prefer to record accounting information.

The base currency can be changed in the <u>Advanced settings</u> >> <u>General</u> window. To change your base currency:

•Click Advanced Settings in the Backstage view.

•Click the General section.

•Click the **Base Currency** button and select the necessary currency in the **Edit Base Currency** window. You will immediately be prompted to set the exchange rates to other currencies.

•Please make sure that the base currency is set to the correct currency before starting your work in TO3000 3D+.



# 14.2. Currencies and exchange rates

## 14.2.1. Adding new currencies

Since the currencies of your clients may be different from yours, you will need to add new currencies to your TO3000 3D+ database and to define their exchange rates relating to your base currency.

Groups of Services		<u>N</u> ew	<u>E</u> dit <u>D</u> elete
Volume Units	*	Currency	Description
📲 Unit Ratios	٩		Click here to define a filter
💲 Currencies	,	AUD	Australian Dollar
Exchange Rates		CAD	Canadian Dollar
Discounts/Markups		CHF	Swiss Franc
Countries		EUR	Euro
Categories		GBP	British Pounds
Payment Methods		JPY	Japanese Yen
🗊 Templates		SEK	Swedish Krona
喧 Email Templates		USD	US Dollars

To define currency settings:

#### 1. Click Business Settings in the Backstage view;

#### 2. Click Currencies;

3. If some of the currencies you need are not included in the list, you may add them by clicking the **New** button. You can also edit or delete existing currencies.

## 14.2.2. Setting exchange rates

You can enter exchange rates between your *base currency* and any of the *client currencies*. Exchange rates of currencies are used for keeping parallel records in both the base currency and client currencies with no mismatch.

Groups of Services		<u>N</u> ew <u>E</u> dit <u>D</u> elet	e
Volume Units	*	Currency	=EUR
📲 Unit Ratios	۹	Click here to define a	filter
S Currencies	•	AUD	0.579
📛 Exchange Rates		CAD	0.628
Taxes			0,020
Discounts/Markups		CHF	0,6476
🌍 Countries		GBP	1,43
Categories		JPY	0,0075
Payment Methods		SEK	0,1108
Templates		USD	0,77
📹 Email Templates			

To enter an exchange rate:

- 1. Click Business Settings in the Backstage view.
- 2. Click Exchange Rates;
- 3. To add a new currency exchange rate, click the **New** button.

4. Select the currency from the drop-down list, enter its rate relating to your *base currency* and click **OK** 

## Editing exchange rates on individual records

New/Edit windows for most database records involving financial transactions (Quotes, Invoices, Payments, etc.) include a special button when the client's currency is different from your base currency.

The button displays the current exchange rate for the Client Currency and you can click it to edit the exchange rate for this specific record.

Edit Payment			x
From: Translation D	esigns	Date Received:	11/11/2016
To: Vitaliy Gutyk		Code	P-TDES0001
Payment Linked with Invoices			
		Ac	ld Phantom Invoice
* Invoice Code Invoice I	Date Invoice Total	Linked with this Payment	Balance Date
▶ I-TDES0002 20.09.20	016 1 000,00	1 000,00	0,00 20.10
New Link Edit Delete	Edit Exchange Rat	e Valid for Current 1USD=EUR OK	Financial Record:
Linked Not Linked RTF Templates: Paym	: <b>1000,00</b> : <b>0,00</b> ent from Client - Template - En	glish.rtf 🔹	Client Currency: USD 1 USD = 0,77 EUR
		C	OK Cancel

#### **Client currencies**

When you add a 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 a 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*.

Each client's currency can be changed on the **Main** tab of the **Clients** window by clicking the **Currency** button in the client's profile.

G	Profile	Custom Fields			
		Currency:		USD	
	Change C	lient Currency		` [	x
	Current	:y:			
	USD	•			
		ОК	Ca	ancel	

# 15. Templates

# 15.1. Templates in TO3000 3D+

*Template* is an *RTF* ("Rich Text Format") file stored in your TO3000 3D+ 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.

## 15.1.1. Saving a document for printing

The following documents can be saved as printable RTF, PDF and DOC files using their own templates:

- Price lists
- Invoices
- Summaries of payments from clients
- Summaries of projects and client jobs
- Credit notes and refunds
- Quotes

Documents can be saved using windows Edit Invoice, Edit Project and so on, as well as Prices tabs of Client/Prospect window, and General Prices for Clients/Prospects window.

Any window which has RTF Templates section can be used to save its data in a printable document.

RTF template controls 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.
- Click **Send Mail** to open the Mail sender with the template-based document already attached and ready to send.

**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.

## 15.1.2. 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 layout and format, you edit the layout 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.

## 15.1.3. Editing templates

Templates can be opened for editing using the **Templates** section of TO3000 3D+ **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.

#### 15.1.4. Template Variables

Variable is a specific symbol combination which is entered in template files. When a document is saved using template, TO3000 3D+ 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.

Templates	232

**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.

## 15.2. Logic and syntax of templates

#### 15.2.1. Variables

All variables and commands can be identified by \ (backslash) symbol in the beginning and 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)\

## 15.2.2. 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 preceeded with dtlink commfnd. 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:**

\dtLinkJobs:COMPLETE D\	\dtLinkJobs:JOB_NAM E\	\dtLinkJobs:SER ICE\
10 N	\dtLinkJobs:COMPLETE D\	\dtLinkJobs:COMPLETE \dtLinkJobs:JOB_NAM D\ E\

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.

## 15.2.3. 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 3D+ 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 a colon symbol and an 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.

## 15.3. Advanced Commands and functions

## 15.3.1. IF-ELSIF-ELSE-ENDIF

Format of the IF-ELSIF-ELSE-ENDIF construction is:

```
\If(Condition1)\
Reaction1
\elsif(Condition2)\
Reaction2
\else\
Reaction3
\endif\
```

**Note**: \*If*\ and \*endif*\ are the mandatory commands in this construction, \*elsif*\ and \*else*\ are an optional commands. The condition must be a variable with a boolean value. Such variables can have only two values: True or False.

## Example:

Invoice template	Explanation
\If(INV_IS_PAID)\	If the invoice is paid (INV_IS_PAID=True), then
Invoice is paid	"Invoice is paid" is displayed in the produced invoice,
\else\	if invoice is not paid (INV_IS_PAID=False), then
Invoice is not paid	"Invoice is not paid" is displayed in the produced invoice.
\endif\	

or

Invoice template	Explanation
\scan(dtLinkJobs)\	If the invoice is paid (INV_IS_PAID=True), then
\scanentry\	"Invoice is paid" is displayed in the produced invoice,
	if invoice is not paid (INV_IS_PAID=False),
\If(INV_IS_PAID) \	then, if
Invoice is paid	(DTLINKJOBS:CJOB_ISCOMPLETED=true),
<pre>\elsif(DTLINKJOBS:CJOB_ISCOMPLETE D</pre>	then "Invoice is not paid" is displayed in the produced invoice,
=true) \	if invoice is not paid (INV_IS_PAID=False) and
Invoice is not paid	if (DTLINKJOBS:CJOB_ISCOMPLETED=false)
\else\	, then
Job is not completed	"Job is not completed" is displayed in the
\endif\	

```
\scanfooter\
```

····· • •

 $\endscan \$ 

## 15.3.2. IIF function

Function **IIF** returns one of the two values depending on the value of a logical expression. The syntax is: IIF(Logical\_expr, Value1, Value2)

Invoice template	Explanation
\scan(dtLinkJobs)\	If the Client Job is completed (DTLINKJOBS:CJOB_ISCOMPLETED
	=true)
\scanentry\	then 100.00 is displayed in the produced
	INVOICE.
<pre>\IIF(DTLINKJOBS:CJOB_ISCOMPLETED=true, 100,0) \</pre>	If the Client Job is not completed (DTLINKJOBS:CJOB_ISCOMPLETED =false),
	then 0.00 is displayed in the produced
\scanfooter\	invoice.
\endscan\	

## 15.3.3. Numeric report functions.

**ROUND** - The Round function rounds a real-type value to an integer-type value. 0.5 is always processed to largest integer number. This is not a banker's rounding.

# Invoice template Explanation \Round(JOBS\_TOTAL) If Jobs Total is 504.49, then 504 is displayed in the produced invoice, If Jobs Total is 504.50, then 505 is displayed in the produced invoice.

**INT** - The INT function returns the integer part of a real number.

#### Invoice template Explanation

\Int(JOBS\_TOTAL) \ If Jobs Total is 504.49, then 504 is displayed in the produced invoice,

If Jobs Total is 504.51, then 504 is displayed in the produced invoice.

## 15.3.4. SUM function

Function SUM can be used after \scan(dtLinkJobs)\, \scan(dtLinkInvoices)\ or \scan(dtLinkPayments)\ to give to some new custom variable the value of the sum of the values in the defined field. The syntax is:

Explanation

 $\scan(table1)$ 

 $\endscan$ , sum(field of the table1, variable1) $\$ 

Total: \variable1\

#### Invoice template

V1) \

\scan(dtLinkJobs)\ Va
\endscan,
sum(DTLINKJOBS:CJOB TOTAL,
ind

Variable V1 is set to return the sum of client job totals anywhere in this invoice, just by entering \V1\ anywhere below in this invoice. If there are two client jobs in this invoice with totals of 345.00 and 678.00, then Total: 1023.00 will be displayed in the produced invoice.

## 15.3.5. CTN function

Total: \V1\

Function CTN can be used after \scan(dtLinkJobs)\, \scan(dtLinkInvoices)\ or \scan(dtLinkPayments)\ to give to some new custom variable the value of number of data field entries with values <> 0. The syntax is:

 $\scan(table1)$ 

\endscan, ctn(field of the table1, variable1) \

Total: \variable1\

#### Invoice template

#### Explanation

\scan(dtLinkJobs)\ \endscan,

ctn(DTLINKJOBS:CJOB\_TOTAL,
V1) \

Number of Client Jobs: \V1\

Variable V1 is set to return the number of client jobs with totals that are <> 0 anywhere in this invoice, just by entering \V1\ anywhere below in this invoice. If there are three client jobs in this invoice with totals of 345.00, 678.00 and 901.00, then

Number of Client Jobs: 3.00 will be displayed in the produced invoice.

## 15.3.6. NORESET option with SUM and CTN functions

**NORESET** option can be used with SUM and CTN functions to add the new values of the source field to the previous result of the function. The syntax is:

```
\scan(table1)\
.....
\endscan, sum(field of the table1, variable1)\
\scan(table2)\
.....
\endscan, sum(field of the table2, variable1,noreset)\
All totals: \variable1\
Invoice template Explanation
```

\scan(dtLinkJobs)\	Variable V1 is set to return the sum of client jo totals plus payment totals anywhere in this invoic just by entering \V1\ anywhere below in this invoic If there are two client jobs in this invoice with total of 345.00 and 678.00 and one payment with total
<pre>\endscan, sum(DTLINKJOBS:CJOB_TOTAL, V1) \</pre>	
$\scan(DTLINKPAYMENTS)$	77.00 , then
<pre>\endscan, sum(DTLINKPAYMENTS: CPAYM_TOTAL, V1,noreset)\</pre>	Total: 1100.00 will be displayed in the produced invoice.
Total: \V1\	

For more details on Variables for each document type, see the chapters of "Available Template Variables".

It is recommended to begin with the <u>Common Template Variables</u> topic.

## 15.4. Locale settings and date format

There are two ways of configuring locale format:

- 1. In TO3000 3D+ (for each *Client* individually):
- open Client/Prospect 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\, \NVOICE\_DATE\_LONG\, and so on. Settings in **Short Date Format** will affect regular variables, like \DATE\_DUE\, \NVOICE\_DATE\, and so on.

2. In Windows Control Panel (these settings are used as default in TO3000 3D+):

- 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.

## 15.5. 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.

## 15.5.1. User information variables

\	VARIABLE:	DESCRIPTION:
N	USER_NAME\	Registration name taken from your License Key. It cannot be modified within program.
N	USER_CURRENCY	Company's Base Currency

## 15.5.2. Date variables

VARIABLE:	DESCRIPTION:
\DATE\	Date in short format (for example, 10/4/2006)
\DATE_LONG\ \LONGDATE\	Date in long format (for example, Monday, October 04, 2006)

## 15.5.3. 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\ \CLIENT_WWW\	Web-site address from client's profile.
\CLIENT_MINFO\	Application information of client document was produced for.
\CLIENT_MWEB\ \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.

## 15.6. 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 wit 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\ \ESTSTART\	Quotes template variable	Date assigned in following format: 9/20/2006.
\COMPLETION\ \ESTCOMPLETION\	Quotes template variable	Deadline date in following format: 9/20/2006.

## **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).

# 15.7. 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\	Project code.
\PROJECT_CLIENT_NAME\	Client project created for.
\PROJECT_CLIENT_CODE\	Client reference number.
\PROJECT_INFO\	Information about the <i>project</i> .
\CLIENT_PM_NAME\	Client project manager

\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.

# 15.8. 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\	Contact email address.
\CONTACT_EMAIL2\	Contact email address 2 (if available).

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\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\	Contact notes.

# 15.9. 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.

## 15.9.1. Common Quote Variables

VARIABLE	DESCRIPTION
\QUOTE_NAME\	Possible quote name.
\QUOTE_CODE\ \CODE\	Quote code.
\SERVICE\	Service name.
\REQUEST\	Request for quote.
\ANSWER\	Answer to request for quote.
\VOLUME\	Quote volume.
\PRICING\ \TYPE\	Quote type.
\PRICE\	Quote price.
\UNITS\	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)

## 15.9.2. 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_PERCENTS\	Tax 1 value in percents
\TAX1_VALUE\	Tax 1 value in client's currency
\TAX1_VALUE_BASE\	Tax 1 value in base currency
\TAX2\	Used in algorithms (If tax 2 exists = True, if it doesn't = False)
\TAX2_NAME\	Tax 2 name

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\TAX2_PERCENTS\	Tax 2 value in percents
\TAX2_VALUE\	Tax 2 value in client's currency
\TAX2_VALUE_BASE\	Tax 2 value in base currency
\TAXES\	Indicates whether the taxes in Tax fields are set; used in algorithms (If any tax is set = True, if it they are not = False)
\AFTER_TAX1\	Total in client's currency after Tax 1 applied
\AFTER_TAX1_BASE\	Total in base currency after Tax 1 applied

## 15.9.3. 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_PERCENTS\	Discount 1 value in percents
\DISCOUNT1_VALUE\	Discount 1 value in client's currency
\DISCOUNT1_VALUE_BASE\	Discount 1 value in base currency
\DISCOUNT2\	Indicates if the discount/markup in the <b>Discount/Markup</b> field is set; used in algorithms (If discount 2 exists = True, if it does not = False)
\DISCOUNT2_NAME\	Discount 2 name
\DISCOUNT2_PERCENTS\	Discount 2 value in percents
\DISCOUNT2_VALUE\	Discount 2 value in client's currency
\DISCOUNT2_VALUE_BASE\	Discount 2 value in base currency
\DISCOUNTS\	Indicates if the discounts/markups in the <b>Discount/Markup</b> fields are set; used in algorithms (If any discount is set = True, if there are no = False)

\AFTER_DISCOUNT1\	Total in client's currency after Discount 1 applied
\AFTER_DISCOUNT1_BASE\	Total in base currency after Discount 1 applied

## 15.9.4. 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, 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).

# 15.10. 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\	lab code
\CODE\	<i>500</i> code.
\PO_CODE\	Purchase order <i>client</i> issued for this <i>job</i> .
\PO\	
\CLIENT_REF\	<i>Client</i> reference number in accounting system of <i>client</i> .
\SERVICE\	Service name.
\GROUP_NAME\	Group of Services name.
\INSTRUCTIONS\	Job 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\	Job units.
\TOTAL\	Job 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\	Job deadline in following format: 10/4/2006.
\DEADLINE_LONG\	Job deadline in following format:
\LONGDEADLINE\	Monday, October 04, 2006.
\COMPLETED\	Completion date in following format: 10/4/2006
\DONE\	
\COMPLETED_LONG\	Completion date in following format: Monday,
\LONGCOMPLETED\	October 04, 2006.
\COUNT_NOTES\	CATCount or AnyCount notes.
\INVOICE_CODE\	Invoice code.
\INVOICE\	
\INVOICE_GLOBAL_CODE\	Invoice global code.
\INV_GLOBAL\	

# 15.11. Invoice template variables

## 15.11.1. Date and code

VARIABLE	DESCRIPTION
\STATUS\	Invoice status (For example: "Expected within 30 days", "Settled 5 days earlier" and so on.)
\DATE_DUE\ \SETTLEMENT_DATE\	Date when invoice is due in following format: 10/4/2006
\DATE_DUE_LONG\ \SETTLEMENT_LONGDATE\ \DUE_DATELONG\	Date when invoice is due in following format: Monday, October 04, 2006

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\INVOICE_DATE\ \INV_DATE\	Date invoice sent in following format: 10/4/2006
\INVOICE_DATE_LONG\ \INV_LONGDATE\	Date invoice sent in following format: Monday, October 04, 2006
\INVOICE _CODE\ \INV_CODE\	Invoice code
\INVOICE _GLOBAL_CODE\ \INV_GLOBAL\ \INV_GLOBALLONG\	Invoice global code

## 15.11.2. Invoice totals

VARIABLE	DESCRIPTION
\INVOICE_TOTAL\	Invoice total in client's currency
\INVOICE_TOTAL_BASE\	Invoice total in base currency
\JOBS_TOTAL\	Jobs total in client's currency
\JOBS_TOTAL_BASE\	Jobs total in base currency
\NET_JOBS_TOTAL\	Jobs total with discounts in client's currency
\NET_JOBS_TOTAL_BASE\	Jobs total with discounts in base currency
\VOLUME_BASE\	Jobs total volume in base units

## 15.11.3. 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_PERCENTS\	Tax 1 value in percents
\TAX1_VALUE\	Tax 1 value in client's currency
\TAX1_VALUE_BASE\	Tax 1 value in base currency
\TAX2\	Used in algorithms (If tax 2 exists = True, if it doesn't = False)
\TAX2_NAME\	Tax 2 name
\TAX2_PERCENTS\	Tax 2 value in percents
\TAX2_VALUE\	Tax 2 value in client's currency
\TAX2_VALUE_BASE\	Tax 2 value in base currency
\TAXES\	Indicates if the taxes in the Tax fields are set; used in algorithms (If any tax is set = True, if it they are not = False)
\AFTER_TAX1\	Total in client's currency after Tax 1 applied
\AFTER_TAX1_BASE\	Total in base currency after Tax 1 applied

## 15.11.4. 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_PERCENTS\	Discount 1 value in percents
\DISCOUNT1_VALUE\	Discount 1 value in client's currency
\DISCOUNT1_VALUE_BASE\	Discount 1 value in base currency
------------------------	---
\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_PERCENTS\	Discount 2 value in percents
\DISCOUNT2_VALUE\	Discount 2 value in client's currency
\DISCOUNT2_VALUE_BASE\	Discount 2 value in base currency
\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 in client's currency after Discount 1 applied
\AFTER_DISCOUNT1_BASE\	Total in base currency after Discount 1 applied
\NET_JOBS_TOTAL\	Jobs total with discounts in client's currency
\NET_JOBS_TOTAL_BASE\	Jobs total with discounts in base currency

# 15.11.5. Payment status variables

VARIABLE	DESCRIPTION
\INVOICE_DUE\	Balance due in client's currency
\INVOICE_DUE_BASE\	Balance due in base currency
\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)

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\BEFORE_ADJUSTMENTS\	Invoice total <i>in client's currency</i> , excluding adjustments	
\BEFORE_ADJUSTMENTS_BASE\	Invoice total <i>in base currency</i> , excluding adjustments	
\ADJUSTMENTS_VALUE\	Value of the adjustments in client's currency	
\ADJUSTMENTS_VALUE_BASE\	Value of the adjustments in base currency	
\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	

#### 15.11.6. Credit note status variables

VARIABLE	DESCRIPTION
\CN_TOTAL\	The total of credit notes linked to this invoice, in the clients currency
\CN_TOTAL_BASE\	The total of credit notes linked to this invoice, in the base currency

### 15.11.7. Jobs variables in invoice

The following variables refer to jobs added to invoice

VARIABLE	DESCRIPTION
\DTLINKJOBS:CJOB_PONUMB\	Client PO of the job
\DTLINKJOBS:CJOB_NAME\	Client job name
\DTLINKJOBS:CJOB_SERV_NAME\	Service name.
\DTLINKJOBS:CJOB_GROUP_NAME\	Group of Services 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 in client's currency
\DTLINKJOBS:CJOB_TOTAL_BASE\	Job total in base currency
\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

## 15.11.8. Linked payment variables

VARIABLE	DESCRIPTION
\DTLINKPAYMENTS:CPAYM_CODE\	Linked payment's code
\DTLINKPAYMENTS:CPAYM_DATE\	Linked payment's creation date
\DTLINKPAYMENTS:CPAYM_TOTOAL\	Linked payment's total value
\DTLINKPAYMENTS:LINK_SUM\	Part of the payment's value linked to this invoice

## 15.11.9. Linked credit note variables

VARIABLE	DESCRIPTION
\DTLINKCREDITNOTES:CN_CODE\	Credit Note's code
\DTLINKCREDITNOTES:CN_DATE\	Credit Note's creation date
\DTLINKCREDITNOTES:CN_TOTAL\	Credit Note's total value
\DTLINKCREDITNOTES:CN_ASSIGN_TOTAL\	Credit note's value covered by refunds
\DTLINKCREDITNOTES:BALANCE\	Credit note's value not covered by refunds
\DTLINKCREDITNOTES:CN_STATUS\	Credit Note's status. Has the following values:
	0 - "Closed": the CN's total is subtracted from the invoice's balance.
	1 - "Awaiting payment": the Invoice is paid and the CN requires a refund.
	2 - "Partially paid": the CN is partially covered by a refund.
	3 - "Fully paid": the CN is fully covered by a refund.

# 15.12. Credit note template variables

#### 15.12.1. Date and Code

VARIABLE	DESCRIPTION
\CN_STATUS\	Credit note status <b>Example</b> : Awaiting payment, Fully paid
\CN_DATE\	Date credit note was sent, in the following format: 10/4/2006
\CN_DATE_LONG\	Date credit note was sent, in the following format: Monday, October 04, 2006
\CN_CODE\	Credit note code

### 15.12.2. Linked invoice variables

VARIABLE	DESCRIPTION
\INV_DATE\	Date linked invoice was sent, in the following format: 10/4/2006
\INV_CODE\	Linked invoice code
\INV_TOTAL\	Linked invoice total in client's currency

### 15.12.3. Credit note totals

VARIABLE	DESCRIPTION
\CN_TOTAL\	Credit note total in client's currency
\CN_SUB_TOTAL\	Credit note total with taxes
\CN_RATE\	Exchange rate into base currency
\CN_TOTAL_BASE\	Credit note total in base currency

#### 15.12.4. 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_PERCENTS\	Tax 1 value in percents
\TAX1_VALUE\	Tax 1 value in client's currency
\TAX1_VALUE_BASE\	Tax 1 value in base currency
\TAX2\	Used in algorithms (If tax 2 exists = True, if it doesn't = False)
\TAX2_NAME\	Tax 2 name
\TAX2_PERCENTS\	Tax 2 value in percents
\TAX2_VALUE\	Tax 2 value in client's currency
\TAX2_VALUE_BASE\	Tax 2 value in base currency
\TAXES\	Indicates whether the taxes in Tax fields are set; used in algorithms (If any tax is set = True, if it they are not = False)

#### 15.12.5. Refund status variables

VARIABLE	DESCRIPTION				
\CN_DUE\	Balance due in client's currency				
\CN_DUE_BASE\	Balance due in base currency				
\CN_PAID\	Total refunds linked to this credit note in client's currency				
\CN_PAID_BASE\	Total refunds linked to this credit note in base currency				
\CN_IS_PAID\	Used in algorithms (If the credit note is paid = True, if it's not = False)				

#### 15.12.6. Linked refund variables

VARIABLE	DESCRIPTION
\DTLINKREFUNDS:CREF_CODE\	Linked refund's Code
\DTLINKREFUNDS:CREF_DATE\	Linked refund's creation date
\DTLINKREFUNDS:CREF_TOTAL\	Linked refund's total value
\DTLINKREFUNDS:LINK_SUM\	The linked refund's value linked to this credit note

# 15.13. Payments template variables

## 15.13.1. Basic payments template variables

VARIABLE	DESCRIPTION
\PAYMENT_CODE\ \CODE\	Payment code.
\PAYMENT_DATE\ \PDATE\	Date <i>payment</i> received in following format: 10/4/2006.
\PAYMENT_DATE_LONG\ \PLONGDATE\	Date <i>payment</i> received in following format: Monday, October 04, 2006.
\PAYMENT_NOTES\	Notes about <i>payment</i> .
\TOTAL_PAID\ \TOTAL\	Total paid.
\NOT_LINKED\	Amount not linked with <i>invoices</i> .
\LINKED\	Amount linked with <i>invoices</i> .
\IS_LINKED\	Used in algorithms (If <i>payment</i> is linked with <i>invoice</i> = True, if it's not = False)
\PAYMENT_NOTES\ \NOTES\	Payment notes

#### 15.13.2. Linked invoice variables

VARIABLE	DESCRIPTION
\DTLINKINVOICES:IDATE\	Linked <i>invoice</i> date.
\DTLINKINVOICES:ICODE\	Linked invoice code.
\DTLINKINVOICES:GNUMB\	Linked invoice global code.
\DTLINKINVOICES:TOTAL\	Linked <i>invoice</i> total.
\DTLINKINVOICES:OTHER\	The part of the linked <i>invoice</i> total covered by other <i>payments</i> .
\DTLINKINVOICES:ADJUST\	The sum of the <i>phantom payment</i> of the linked <i>invoice</i> .
\DTLINKINVOICES:BALANCE\	Balance Due of the linked invoice.
\DTLINKINVOICES:DATEDUE\	Linked <i>invoice</i> due date.

These variables can add information from linked invoices to payment template

# 15.14. Refund Template Variables

VARIABLE	DESCRIPTION
\REF_CODE\	Refund code
\REF_DATE\	Date refund was received, in the following format: 10/4/2006
\REF_DATE_LONG\	Date refund was received, in the following format: Monday, October 04, 2006
\REF_NOTES\	Notes about refund.
\TOTAL_PAID\	Total paid (in client's currency).
\TOTAL_PAID_BASE\	Total paid (in base currency).
\REF_RATE\	Exchange rate.

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\NOT_LINKED\	Amount not linked with credit notes.				
\LINKED\	Amount linked with credit notes.				
\IS_LINKED\	Used in algorithms (If refund is linked with credit note = True, if it's not = False).				

### 15.14.1. Linked credit note cariables

VARIABLE	DESCRIPTION
\dtLinkCNs:ICODE\	The credit note's code
\dtLinkCNs:IDATE\	The credit note's creation date
\dtLinkCNs:TOTAL\	The credit note's total value
\dtLinkCNs:LINKED\	The part of the credit note's total that is linked to this refund
\dtLinkCNs:OTHER\	The part of the credit note's total that is linked to other refunds
\dtLinkCNs:BALANCE\	The part of the credit note's total that is not linked to any refund

## 16. Data Import Utility

The TO3000 3D+ Data import Utility is used to import information about Clients from outside sources without the need to manually enter it.

The utility can import data from the following file types: XLS and XLSX (Microsoft Excel), TXT, CSV, DBF (dBase 3, 4 and 5), XML (Data Packet 2.0)

Import settings can also be saved in special scenario files, allowing you to import data from the same source regularly, without having to fiddle with the settings every time.

**NOTE**: It is highly recommended to <u>backup</u> your database before using the Data Import utility. This will allow you to quickly roll back unintended or undesired changes.

The next topics will cover the process of importing data from the different file formats

#### 16.1. Selecting the mode and file

The first step when using the Data import utility is to choose the format of the source file. This is the step at which you can load a scenario file.

🐞 TO3000 3D Import U	Utility (15.0.0.1)	- ×
TO3000 3D		
	Import from         • .XLS (MS Excel)         • .XLSX (MS Excel 2007)         • .DBF (dBASE 5, dBASE III, dBASE IV)         • .TXT (Text)         • .CSV (Comma Separated Values)         • .XML (Data Packet V.2.0)	
Import Utility		
Load Scenario	Save Scenario < Back Next > Start Import	Exit

Finally, you select the actual source file. If you loaded a scenario beforehand, the file path to the source file will likely be pre-entered.



The next screen is the Range Editor. Its appearance will vary depending on the chosen format. See the topics for each format for more details: <u>XLS</u>, <u>XLSX</u>, <u>DBF</u>, <u>TXT</u>, <u>CSV</u>, <u>XML</u>.

## 16.2. Range Editor

#### 16.2.1. XLS Range Editor

Used for pre-2007 Microsoft Excel files.

Target Fields in Projetex	Source	e .XLS file (short sample)		Skip title rows:	0		
Skip title columns: 0							
🚭 Code	Client	ts					
Street1		A	В	С			
🖏 Street2		CLIENT NAME	CLIENT STREET1	CLIENT STREET2	CI		
E City	2	Alter Ego Solutions	Kauppatori 4		Fi		
	3 (	Chameleon Decorations Corp.	2207 N. Buckeye Avenue		Ui		
±⊚ ZIP Code	4	E-Mania Pharmacy	450 Powell Street		Ui		
Add E Edit - Clear	5	Electric Dream Design	9, rue Got-le-Coeur		Fr		
	6	Forever Reflections Publishing	Wergelandsveien 5		N		
Import Range for selecte	7	Mythology Development Company	Vasaplan 7, Box 884		Sv		
	8	Parallel Dimensions Travel Ltd.	55 Hampton Park Blvd.		Ui		
	9	Rainbow Chasers Community	Jr Kyoto Eki-Mae, Shiokoji-Dori		Ja		
	10 5	Snowmaker Corporation	Gallen-Kallelankatu 7		Fi		
	11	Wishmaster Guild Entertainment	1 Balchug street		Ri		
	12 /	Astral Dust Records	Messedamm 10		G		
	13	Wilderness Protection Company	64 Queensborough Terrace		U		
	14	Ocean World University	7655 Decarie Blvd		Ci		
	15 /	Another Way Software	Via Galvani 19		Ita		
	16	Winged Motors Corporation	12 Dongkwangdong-2ga		Kc *		
					•		

The two main elements are the **Target Field List** in the upper-left, and the file contents on the right side of the screen.

To designate a range of cells to be imported into a field of the Client table in TO3000, select the target field and click **Add**.

This will bring up the New/Edit Range dialog:

Range	x
— Range Type ————————————————————————————————————	
Col	Col A
	- Finish
Where data started	Where data finished
O Start Row	O Finish Row
- Direction	
🖲 Down	⊖ Up
- Sheet	
O Default Sheet	
Custom Sheet	
O Sheet Number	\$
Sheet Name	Clients 🗘
	OK Cancel

Here you can determine the range's type (row or column or single cell), it's location and boundaries, as well as the direction in which the data in it should read.

A single target field can have multiple ranges. An existing range can be edited or removed.

Alternatively, you can hold **Ctrl** or **Shift** and click the rows/columns/cells you want to add to a particular range. Press **Enter** to confirm your selection or **Escape** to cancel it.

If the table has a number of title rows and/or columns, they can be skipped by inputting their number into the **Skip title rows/columns** filed in the upper-right corner of the main editor.

#### 16.2.2. XLSX range Editor

Used for Microsoft Excel 2007 and newer files.

Step 1 of 3								
🕤 Select field na	me from the list bo	x, the	n dick					
Fields	Col			3	:	Skip row(s) 0		
🖏 Name	[Clients]A		Clie	ats				
Code								
E Churcht				A	В	<u> </u>		
=⊚ Street1			1	CLIENT NAME	CLIENT STREET1	CLIENT STREET2		
🖏 Street2			2	Alter Ego Solutions	Kauppatori 4	F		
E City		=	3	Chameleon Decorations Corp.	2207 N. Buckeye Avenue	l		
TIP Code			4	E-Mania Pharmacy	450 Powell Street	t		
The second			5	Electric Dream Design	9, rue Got-le-Coeur	F		
¤© State			6	Forever Reflections Publishing	Wergelandsveien 5	1		
🎼 🖏 General Info	•		7	Mythology Development Compa	Vasaplan 7, Box 884	5		
🖏 Country			8	Parallel Dimensions Travel Ltd.	55 Hampton Park Blvd.	L L		
Currency			9	Rainbow Chasers Community	Jr Kyoto Eki-Mae, Shiokoji-Dori	J		
The second second			10	Snowmaker Corporation	Gallen-Kallelankatu 7	F		
¤@ E-Mall1			11	Wishmaster Guild Entertainment	1 Balchug street	F		
🖏 E-Mail2			12	Astral Dust Records	Messedamm 10	(		
🔩 Phone 1			13	Wilderness Protection Company	64 Queensborough Terrace	l		
E Phone 2			14	Ocean World University	7655 Decarie Blvd	(		
Phone2			15	Another Way Software	Via Galvani 19	I		
¤@ Phone3			16	Winged Motors Corporation	12 Dongkwangdong-2ga	ł		
🍜 Phone4			17	Skywatcher Optics Ltd.	75, Waterloo Road	H +		
🔩 Fax			1			•		
Load Scenario Save Scenario < Back Next > Start Import Exit								

Select a TO3000 database field from the left-hand list and click the corresponding column in the table to the left to assign that column to the field.

The Auto-assign button will automatically assign columns to fields based on their order and **Cancel** in will clear all selections.

Use the Skip Row(s) field to exclude title rows from the import.

#### 16.2.3. DBF Range Editor

Used for dBase 3, dBase 4 and dBase 5 files.

Step 1 of 3					
				( chlove one.)	
Target Fields in Projetex Datab	Clients.dbf			-	
🖏 Code	til				
🖽 General Info	= 🖏 VAT				
🖽 Contact Notes	CURRENC	Y			
🖽 Marketing Info	🖏 GROUP				
🖏 Marketing Link	🖏 LANGUAG	E			
🖏 Minimum Fee	🖏 UNITS			=	
BRICE Group	PRICE				
Import Map:	🔽 Skip Delete	d Rows			
DataSet	DBF			Add	
the Name	NAME		=	Remove	
🖏 Street1	STREET1				
🖏 Street2	STREET2			Clear	
🖏 ZIP Code	ZIP				
🖏 State	STATE				
E City	CITY				
E Country	COUNTRY				
Load Scenario Save Sc	ario < Back	Next >	Start Import	Exit	

Select the target and source fields in the top half off the screen and click **Add** to set up a link between them.

Click Remove or Clear to cancel a particular link or all links, respectively.

One peculiar feature of dBase is that deleted records are not immediately removed from the database, instead they are just given the "deleted" status, emulating a "recycling bin" kind of functionality.

You can choose to either skip these rows or import them with the Skip Deleted Rows checkbox.

#### 16.2.4. TXT range editor

Used for whitespace-separated TXT databases.

					Step 1 of 3
Double click	to add o	or remove	e col	umn separators. Click at the area between separators to define the imported column.	
aet Fields	Р	s		Source .TXT file (short sample) Skip li	ines 1
Name	0	31			Clear All
Code					dood
Street1	34	24		CLIENT NAME CLIENT STREET1	CLIENT
Street2	60	17	=	Alter Ego Solutions Kauppatori 4	
City	96	15		Chameleon Decorations Corp. 2207	N. Buc
ZIP Code	113	10		E-Mania Pharmacy 450 Powell Street	
Ctata	105	10		Electric Dream Design 9, rue	Got-le
State	125	12		Forever Reflections Publishing Wergelandsveien 5	
General Info				Mythology Development Company Vasapian 7,	BOX 88
Country	80	14		Parallel Dimensions fraver Etd. 55 hampton Park Bivd.	Shioke
Currency	139	8		Snowmaker Corporation Gallen-Kallelankatu 7	DIIIORC
E-Mail1				Wishmaster Guild Entertainment 1 Balchug street	
E-Mail2				Astral Dust Records Messedamm 10	
Phone1				Wilderness Protection Company 64 Queensborough Terrace	
Phone2				Ocean World University 7655 Decarie Blvd	
Phone2				Another Way Software Via Galvani 19	
Phones					
Phone4					
		L•	)		
Load Scen	ario	Sa	ve S	Scenario < Back Next > Start Import	Exit

**Important Note**: The spaces between the columns in the file must be filled with **whitespace** characters, not tab characters.

To import data from a TXT file, you must first define the columns by placing separator lines.

Double click to place and remove separators, click and drag to move them. The space between two separators should completely cover the longest entry in that column.

Once all separators are placed, select fields from the list to the right and click the required columns in the table. The import utility will record the starting point and width of the column for each field.

Use the Skip Lines field to skip title lines.

Clicking **Clear all** will remove the mapping between the columns and database fields, but not the separators.

#### 16.2.5. SCV range editor

Used for Comma Separated Values files.

Before going to the range editor itself, you can adjust the "comma" and "quote" symbols that the utility will be looking for while reading the file, since some files can use symbols different from the standard.

CSV options: —		
O Auto	Comma ,	Quote "
Manual	Comma , 🗘	Quote

The interface of the CSV Range Editor proper is quite similar to that of the XLSX range editor.

				St	ep 1 of 3
🕤 Select field name	e from	the	list box, then click at the column to import this field to.		)
rget Database			Source .CSV file (short sample)	Source column number	1 =
3 Name	1			Skip line(s)	1
3Code			Column 1 Column 1	Column 2 Column 2	Colu
3 Street1	2				CUT
3Street2	3	=	Alter Ego Solutions	Kauppatori 4	
₃ City	5		Chameleon Decorations Corp.	2207 N. Buckeve Avenue	
IZIP Code	6		E-Mania Pharmacy	450 Powell Street	
3 State	7		Electric Dream Design	9. rue Got-le-Coeur	
General Info			Forever Reflections Publishing	Wergelandsveien 5	
Country	4		Parallel Dimensions Travel Ltd.	Vasablah 7. Box 884 55 Hampton Park Blvd	
Currency	17		Rainbow Chasers Community	Jr Kvoto Eki-Mae. Shiokoii-Dori	
F-Mail1	8		Snowmaker Corporation	Gallen-Kallelankatu 7	
E-Mail2	9		Wishmaster Guild Entertainment	1 Balchua street	
Phone1	10		Astral Dust Records	Messedamm 10	
Phone2	12		Ocean World University	64 Oueensboroudn Terrace 7655 Decarie Blvd	
Phone3	12		Another Way Software	Via Galvani 19	
Phone4	15		Winged Motors Corporation	12 Donakwanadona-2aa	
4 U			Shwatcher Ontics Ltd	75 Waterloo Road	
<u></u>		_			
Load Scenario		S	ave Scenario < Back	Next > Start Import	Exit

Select a database field and click a Column in the file display to link it to that field. Click the 'X' button to clear all links.

Use the Skip lines field to exclude title lines.

#### 16.2.6. XML Range Editor

Used for Data Packet V 2.0 files.

				Step 1 of 3
GCick the "Add" button to set the accordance betwee	n the imported column an	d the table field or di	ck the "Remove" bu	tton to remove one.
Target Fields in Projetex Database	Clients.xml			<u> </u>
🖏 Code	RAME			=
🖏 Street1	STREET1			
🖏 Street2	STREET2			
🖽 City	E CITY			
🖏 ZIP Code 💽	E STATE			
	E ZIP			· · · · · · · · · · · · · · · · · · ·
Import Map:				
DataSet XML				Add
🖏 Name = NAME				Demove
				Kemove
				Clear
Load Scenario Save Scenario	< Back	Next >	Start Impor	t Exit

Select the target and source fields in the top half off the screen and click **Add** to set up a link between them.

Click **Remove** or **Clear** to cancel a particular link or all links, respectively.

## 16.3. Formatting Options

The next step after the Range editor involves setting the options for parsing some of the formatting in the source file. These options are separated between two tabs.

#### 16.3.1. Base Formats

Base Formats Data Formats	Step 2 of 3
- Date & Time Formats	Separators
Short date dd.MM.yyyy	Decimal
Long date d MMMM yyyy 'y.'	Thousand #160
Short time h:mm	Date .
Long time h:mm:ss	Time :
Boolean True Boolean False	Null Values
True False	Null
Load Scenario Save Scenario < Back Next >	Start Import Exit

Here you can tell the utility how the source file records dates and time, what separators are used for decimals, thousands (by default set to #160: non-breaking space), date and time, as well as enumerate the values used to represent the boolean states and the null state.

#### 16.3.2. Data Formats

Base Formats Data Formats									-
Name		Field Tuning							
Code			Genera	ator value	0		Generator ster	0	
Street1					-		ocherator step		
Street2			Const	ant value		_			
City	_		1	Vull value			Default value	2	
ZIP Code			L	eft quote			Right guote	•	
State			_				5 1		
General Info			Quo	ote actior	AS IS			Ŧ	
Country			(	Char case	As Is			\$	
Currency				Char set	As Is			\$	
E-Mail1		Replacemen	ts						
E-Mail2		Taxt to find		Poplaco v	ith	Ignore c			A
Phone1		Text to find		Replace w	nun	Ignore c			
Phone2									
Phone3									
Phone4									
Fax									
Contact Notac									
Load Scenario Save S	cena	rio	< Back		Next	>	Start Import	E	xit

On this tab you can customize the format of each imported field in case when additional formatting is required. Select the field in the 'Field Name' list and set its format in the proper edit fields. The available options are as follows:

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 quotation** - set a character or a number of characters, which denote quoting in the imported string.

**Right quotation** - set a character or a number of characters, which denote unquoting in the imported string.

**Quotation 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.

#### Replacements

Here you can set the replacement list for the selected field.

ext to find	Replace with	Ignore	case	
United States of America	USA	Yes		
Replacement		×		
Text to find				
United States of America				
Replace with				
USA				 
🔽 Ignore case				
🔽 Ignore case			t Tura in a st	

Every time the utility finds cell in that field, with a value matching one in the list, it will be automatically replaced. The **Ignore Case** option allows you to treat strings with different capitalizations as the same string and replace them all with a single alterative string.

## 16.4. Import Options

🔵 Insert All	<ul> <li>Insert New</li> </ul>	🔘 Update	Opdate or Insert
AvailableColumns		Sel	lected Columns
Code General Info E-Mail1 Phone1 Phone2 Phone3 Phone4 Fax Contact Notes Web-site VAT Number		Name         Street1         Street2         City         ZIP Code         State         Country         Currency         Name	Key Columns
Import all records	🔿 Nun	nber of first records to be im	ported 0

Here you can select the import mode and set the extent of the import.

Four Import modes 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 which already exist in the target object, others are skipped

Update or Insert - Updates existing records and inserts new records

To choose which columns to import data into, select them in the "Available/Selected Columns" lists and use the four buttons between the lists to move the columns back and forth.

When using any Import mode other than **Insert All**, you will be required to designate one or more Key Columns. If a particular record's Key Column values match those of a record already in the database, the matching record will be updated. Otherwise, the data will be placed into a new record. Choose Key columns by using the "up/down" buttons next to the "Selected Columns" list.

At the bottom of the window you can choose whether you want to import all the records in the file or only a certain number (starting from the top).

Once you are satisfied with the settings, click Start Import.

**NOTE**: If you want to save an import scenario for later use, it is recommended to do so at this step, immediately before or immediately after performing the actual import.

#### 16.4.1. Import scenarios

Import scenarios are special files that store the configuration of import sessions.

They are very useful for those who regularly import files from the same source, as using them allow to avoid having the configure the import session by hand.

To manage import scenarios, use the **Save Scenario** and **Load Scenario** buttons in the bottomleft corner of the window.



A scenario can be saved at any point during the configuration process, but it is recommended to save scenarios immediately before or immediately after performing the actual import.

A scenario can be loaded only during the "select format" step.

# 17. AnyCount in TO3000 3D+

## 17.1. Introduction

AnyCount is a 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 3D+ has a built-in AnyCount to aid and simplify job creation and expenses calculation for each job.

AnyCount 3D 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 3D+, AnyCount is used to quickly calculate volumes of new jobs and quotes. AnyCount options can be found in the **New/Edit Draft Client/Prospect Job**, and **New/Edit Client/Prospect Job windows**.

## 17.2. Counting files

In TO3000 3D+, AnyCount is used in the following way:

When creating a job, click the **<=AnyCount** button to run AnyCount. It will automatically count the 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.

**ONOTE**: If the units selected where not specified as "Used by AnyCount" you will not be able to perform the count. This option is available on the <u>AnyCount tab of the User Settings</u>. It was implemented to distinguish volume units, that cannot be used as text volume units (e.g. "hours").

2. Click the **<=AnyCount** button.

3. Select the file(s) to be counted in the **Open** window and either double click it or click the **Open** button:

4. The AnyCount Engine will count the text in the selected file(s) and enter the count results into the **Volume** field of the **New/Edit Job** window.

J. All expanded could report is added on the <b>Notes</b> tab which appears after Allycould is use
--

Edit Client	Job								x	
Client: Digital First Concierge Code: Client PM: Ivan Nikitin Client Ref.:								: J-DFC0005		
Details	Instructions	Work Notes	Notes*	Custom Fields	Job Folder					
								F	Remove	
AnyCou Volume	AnyCount Results * Volume Units: words (without numbers) ====================================									
File:	D:\trado	s\Manuals	\SDL Tra	ados Studio	2011 SP2	Installation	Guide.pdf			
Total	. count fo	r this fi	le:	10227						
Files Total	count fo	r all fil	es:	1 10227						
Gener	ated by T	03000, Ve	rsion 31	0, 21.04.20	17 at 16:	26:24				

## 17.3. Creating client jobs based on counted file(s)

Right-click in the **Client Jobs** tab of the **Project** or **Client** window 9 depending on current workflow mode and select **AnyCount**. Select the volume unit to count in and click the **OK** button. Select the file(s) to count. Once the count process is completed, TO3000 will open the "new client job" window with the name of the counted file, and the appropriate volume and volume units. If you chose to count multiple files, the program will ask you if you want to create a single job for all selected files or a separate job for each file.

00	0018, Engine scheme ER-34221: Client Jobs 🔻									
Main Clie			Jobs	Info	Info Calenda					
	New Edit			dit	D	te				
*	Co	de	J	ob Nan	ne		Project	C		
	Open Client				FR-342	21	0018			
					R-342	21	0018			
	ŀ	Open Project			R-342	21	0018			
		Grid S	ettings	+						
		Expor	t							
		Print								
		AnyC	ount							
		Clone	2							

# 18. CATCount in TO3000 3D+

## 18.1. Introduction

CATCount is a tool for calculating Computer Assisted Translation (CAT) cost. In TO3000 3D+, CATCount is used for accounting of computer assisted translation jobs. It's primary functions are:

•*translating* complex CAT Schemes (different rates and counts of different types of text) into a single text count number, i.e. the CATCount.

• importing CAT counts from Trados Translator's Workbench and Logoport logs.

• printing of CAT Schemes together with the original word counts.

CATCount options can be found in the following TO3000 3D+ windows: **New/Edit Draft Client Job**, **New Client Job (Edit Client Job)** and **New Quote (Edit Quote)**.

### 18.2. Interface

In TO3000 3D+, CATCount is used in the following way.

When you open a **New Job** window you specify the job name, group and service at first. CATCount comes in handy when you want to specify the volume of the job and calculate its cost using the CAT Scheme. The result will be automatically entered into the **Volume** field.

When you create a job or a quote and click the **<=CATCount** button, you open the CATCount window. With the help of this window you can enter word counts for different match types, and their respective rates. CATCount automatically calculates the equivalent CAT count and enters the resulting number into the **Volume** field.

CATCour	nt - example.cat						X
Scheme	Log Output Match types:	Words:		Percentage payment of fu word rate:	III		Equivalent wordcount to be paid at full word rate:
	Perfect Match	0	x	0 ‡	%	=	0
	Context Match	0	x	0 ‡	%	=	0
	XTranslated	0	x	0 ‡	%	=	0
	Repetitions	0	x	0 ‡	%	=	0
	Cross-file Repetitions	0	x	0 ‡	%	=	0
	100% Matches	0	x	0 ‡	%	=	0
	95% - 99%	0	x	0 ‡	%	=	0
	85% - 94%	0	x	10 🛟	%	=	0
	75% - 84%	0	x	10 ‡	%	=	0
	50% - 74%	0	x	10 🗘	%	=	0
In	ternal Fuzzies 95% - 99%	1000	x	30 🗘	%	=	300
Int	ternal Fuzzies 85% - 94%	1000	x	60 🛟	%	=	600
In	ternal Fuzzies 75% - 84%	1000	x	60 ‡	%	=	600
In	ternal Fuzzies 50% - 74%	1000	x	100 ‡	%	=	1000
	No Match	1000	x	100 ‡	%	=	1000
	Total wordcount:	5000		Tota	al C	ATC	Count: 3500
	Total wordcount:	5000		Tota	al C	ATC	Col

## 18.3. Creating CAT counts

1. Click the <=CATCount button in the New/Edit Draft Client Job , New Client Job (Edit Client Job) or New Quote (Edit Quote) window to open the CATCount window.

2. Enter the number of words with different match levels (100% match, "fuzzy" match and so on), and the percentages of full rate payment, i.e. the CAT Scheme. Once you have entered the values you can save the scheme by clicking **Scheme** > **Save**. You can load it next time by clicking **Scheme** > **Load**.

**NOTE:** You can load word count analysis logs from Trados Translator's Workbench or Logoport using the menu **Log** > **Load**.

3. Click OK to enter the Total CATCount number into the Volume field.

An expanded count report is added on the **CATCount Notes** tab which appears after CATCount is used.

## 19. Integration with ExactSpent

ExactSpent is a Time tracking software, designed to help users manage and optimize their work time.

The current version of ExactSpent features integration with TO3000, allowing the two programs to work in tandem.

#### 19.1. Automatic Job Submission

The New/Edit Client Job Window in TO3000 features an ExactSpent button.

Details	Instructions	Work Notes	Custom Fields	Project Folder	Alerts			
	Name:	FAQ file DTP						
	Group:	Editing				-		
	Service:	DTP check				-		
	Volume:		30 hours	-	<u> A</u> I	nyCount	<u>C</u> ATCount	ExactSpent
	Price:	75,	03 per unit	•	4	Prices		Client Currency: EUR

Pressing it checks if ExactSpent is installed, if the volume unit, pricing method, and special status are correct, and if all is in order, opens/launches ExactSpent, opens the Start Job dialog and focuses it on the Job in question. If that job and/or it's client don't exist in ExactSpent yet, they are created.

## 19.2. Job Duration Transfer

Once you pause or stop a job sent to ExactSpent from TO3000, it's current duration is sent back and entered into the Volume field. When you click the Move to Completed button in ExactSpent, the corresponding Job in TO3000 will receive the "Completed" status.



If TO3000 is not running when you pause/stop/complete such jobs, the data will be recorded in a small file and transferred into TO3000 at next launch.

**NOTE**: information will be sent back to TO3000 ONLY if the option "<u>Enable ExactSpent</u> <u>feedback</u>" is enabled.

# 20. Exporting

Any table in TO 3000 can be exported to a number of formats (CSV, TXT, HTML, XLS, XLSX, XML, PDF), by clicking the **Export** button in the top-left corner of the program window.

	8	9 -	;				
		Prosp	ects	Clients	Proje	ects	
	<b>`</b>	6	r::		3		
E	xport						X
	Export	to:					
	PDF				•		
-	🗹 Ope	en after	export				
	V Em	bed fon	ts				
				ОК		Cancel	

This will open the Export dialog box with several options.

The Export to drop-down list can be used to select format of the output file.

The Open after export check-box automatically opens exported file.

The **Embed fonts** check-box, only visible when exporting to PDF, creates a .pdf file with all used fonts embedded (using this option you can be sure that you text will look the same on any computer, even if the fonts used are not installed there).

# 20.1. Printing

To print any table, click the **Print** button next to the Export button.

This will open the Print Preview window and allow you to adjust the appearance of the table (e.g. alter the margins, page parameters, etc.) before printing it.

Contraction	6	3 ₹				то	3000, Version 3D - Eva	aluate Period		
Ø					NewRepo	rt - Print Preview				
	2	) 🛱 🗄 🍠 💾 🧃	Preview							
<b>C</b> , (	} 🔒	0 C 4 5 1	🔤 🌛 🔹	袮 ▾ 🚥		Zoom 🔻 Þ <	Navigation 🔻	🦻 🗐 👁 🔻 Ci	ose Print Preview	∕
Margi	ns Le	ft: 12,7 mm Top:	12,7 mm	Right:	12,7 mm Bot	tom: 12,7 mm H	leader: 5,1 mm	Footer: 5,1 m	m	
[		1								1
		1	Name		Currency	Country	E	Mail		
		Unlimited Concepts U	nified		USD	Spain	translations@ur	nlimited-concept		
		Translation Designs			USD	United States				

## 21. Mass action

*Mass action* in TO3000 3D+ allows you 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

## 21.1. Mass invoicing

*Mass invoicing* can be done from the **Invoices to Clients** window. It allows to quickly invoice all or certain jobs stored in the database.

1. To begin the invoicing procedure, open the **Clients: Invoices window** and click the **Mass Invoicing** button (shortcut Alt+M).

2. This will open the Mass Invoicing window which should look like this:

Clients:	Invoic	es 🕶							
M	lass In	voicing		<u>E</u> dit		Status:	*All*		
Mass Ir	nvoicin	ıg						? X	c
	<u>S</u> elect	All		C <u>l</u> ear All					
* Incl	ud Cli	ent`s na	me					Invoices added	
	Int	ernet Se	curity	/ Technologies					Ш
	Un	limited	Conc	epts Unified					Ш
	Tra	anslatio	n Des	signs					Ш
	En	igma Se	erver	Technologies, In	с				Ш
	Re	liable N	etwo	rk, Inc					Ш
	Glo	obal Inte	ractiv	/e Resources					Ш
• 🗸	1 Th	e Lightn	ing G	Faphics					1
	Glo	obal Co	ncept	s Universal					
	Th	e Illustra	ative (	Designs					
	Dig	gital Firs	t Cor	ncierge					
	Ne	twork C	omm	unity Technologi	es				
	Ma	ssive A	rchwa	ay, Inc					
	Wi	reless A	dept						-
₩ ₩	4 7	7 of 24	• 1	* W 2	4			÷	
0	One In	voice p	er Cl	ient					
0	One Pi	roject p	er In	voice					
0	One C	lient Jol	b per	Invoice					
	nclude	comple	eted i	iobs only					
	nclude	comple	eted	projects only					
						<u>G</u> enerate	2	<u>C</u> ancel	

•Select the *clients* whose *jobs* you wish to invoice by double-clicking the check box in front of each client.

•Select one of three Invoicing modes: Generate a single invoice for all jobs of a single client, all jobs in a single project, or create a separate invoice for each job.

•Select **Include completed jobs only** to generate *invoices* only for *jobs* that are marked as finished in your database, or **Include completed projects only** to generate *invoices* only for *jobs* from *projects* that are marked as finished.

3. After selecting the required clients and setting up the **Mass Invoicing** options, click the **Generate** button. The program will begin creating invoices, which will be indicated by a progress bar.

4. Once all specified invoices have been generated, the **Mass Invoicing** window will display the number of invoices generated against each *client*.

6. You can now adjust the settings and generate another set of invoices.

**NOTE:** Once the *invoices* have been generated, they can be opened and edited in the **Invoices to Clients** window or the **Invoices tab** of the **Client** window.

## 21.2. Mass payments from clients

Multiple *payments* from clients can be created according to existing *invoices* and linked with them.

1. To open the **Mass Payments** window, open the **Clients: Payments** window first, and then click **Mass Payments** button (shortcut Alt+M).

#### 2. This will open Mass Payments window:

Mass Paym	ect All Clear All Client`s name Internet Security Technologies Unlimited Concepts Unified Translation Designs Enigma Server Technologies, Inc Reliable Network, Inc		Payments adde	×
Sele	ect All Clear All Client's name Internet Security Technologies Unlimited Concepts Unified Translation Designs Enigma Server Technologies, Inc Reliable Network, Inc		 Payments adde	
* Include     □     □     □     □     □     □     □     □     □     □     □     □     □     □     □     □	Client's name Internet Security Technologies Unlimited Concepts Unified Translation Designs Enigma Server Technologies, Inc Reliable Network, Inc		Payments adde	
• V	Internet Security Technologies Unlimited Concepts Unified Translation Designs Enigma Server Technologies, Inc Reliable Network, Inc			
	Unlimited Concepts Unified Translation Designs Enigma Server Technologies, Inc Reliable Network, Inc		 	
	Translation Designs Enigma Server Technologies, Inc Reliable Network, Inc			
	Enigma Server Technologies, Inc Reliable Network, Inc			)
	Reliable Network, Inc			
	Global Interactive Resources			
	The Lightning Graphics			
$\checkmark$	Global Concepts Universal			
	The Illustrative Designs			
	Digital First Concierge			
	Network Community Technologies			- 1
	Massive Archway, Inc			
	Wireless Adept			
	Future Unified Resources			
	Definition Designs	T		Ŧ
• • •	3 of 21 🕨 🍽 🎜	4	Þ	
One	Payment per Client			
One	Payment per Invoice			
O Phan	tom Payments			
		-		

•Select the **clients**, whose *invoices* you wish paid, by double-clicking the check box in front of each client.

•Select one of three payment generation modes: create and link a single payment to all of a client's invoices, create and link a separate payment for each invoice, or cover the invoices with Phantom payments.

3. After selecting the required clients and setting up mass payment options, click the **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, the **Mass Payments** window will display the number of new payments created for each client.

5. You can adjust **the** settings and generate another set of payments.

**NOTE:** Once the payments have been generated, they can be opened and edited in the **Clients: Payments** window or the **Payments** tab of the **Client** window.
## 22. Custom queries

SQL queries can be made to TO3000 3D+ 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]

## 22.1. 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.

🚱 Query Builder			
Generate Ouery Run Q Model Query Data	Juery OK	Cancel	
Query Name:			
Content:			*
Description:			-

Advanced International Translations

2. Beginning creating the model of the querySwitch to the Model tab:

🚱 Query Builder			
Generate Query Run Query Model Query Data	ок	X Cancel	
			AIT\$COMPANY AIT\$FIELDS AIT\$FIELD_GROUPS AIT\$FIELD_GROUPS AIT\$LOCKS AIT\$MESSAGES AIT\$METADATA AIT\$QUERIES AIT\$REPORTQUERIE AIT\$REPORTS AIT\$REPORTS AIT\$SERGRIDS AIT\$USERGRIDS AIT\$USERS AIT\$USERS AIT\$VERSIONS CACCMANAGERS CACCOUNTS
Field Table			
Show			
Sort			
Function			
Group			

#### 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.

Sei 🥳	ry OK	Cancel	
Model Query Data			
			AIT\$USERS AIT\$VERSIONS CACCMANAGERS CACCOUNTS CCONTACTS CDISCOUNTDEFS CFINLINKS CFINLINKS CFIPS CINFO CINFO CINFO CINFO CINFO CINFO CINFO
Field			
Table			
Show			
Sort			
Function			
Group			

#### 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.

Sol Generate Q	uery Run Q	Jery OK Cancel	
Model Q	uery Data	CLIENT_ID CURR_ID CINV_IS_VOID CINV_VOID_DESC CINV_VOID_NOTE CINV_FNUMB CINV_TAX1_TOTAL_B CINV_TAX2_TOTAL_B CINV_DIS1_TOTAL_B CINV_DIS2_TOTAL_B CINV_TOTAL_B CINV_ASSIGN_TOTAL_B CINV_ADJUST_TOTAL_B CINV_VOID_DATE	<ul> <li>▲ AIT\$USERS AIT\$VERSIONS CACCMANAGERS CACCOUNTS CCONTACTS CDISCOUNTDEFS CFINLINKS CFTPS CINFO</li> <li>■ CINVOICES CJOBS CLIENTS CMETAINVOICES CMULTIQUOTEITEM CMULTIQUOTES</li> </ul>
Field	CLIENT_ID	CINV_TOTAL_B	
Table	CINVOICES	CINVOICES	
Show	Show	Show	
Sort			
-			

#### 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:

Senerate Query	💞 Run Query	✓ ок	× Cancel		
Model Query I	Data  CLIENT_II CURR_ID CINV_IS_ CINV_VOI CINV_FNU CINV_FNU CINV_TA) CINV_TA) CINV_TA) CINV_TA CINV_DIS CINV_TO CINV_TO CINV_ASS CINV_AD CINV_AD	VOID D_DESC D_NOTE IMB I1_TOTAL_B I2_TOTAL_B I_TOTAL_B 2_TOTAL_B Z_TOTAL_B GIQN_TOTAL_B UST_TOTAL_B D_DATE		· .	AIT \$USERS AIT \$VERSIONS CACCMANAGERS CACCOUNTS CCONTACTS CDISCOUNTDEFS CFINLINKS CFTPS CINFO CINFO CINVOICES CJOBS CLIENTS CMETAINVOICES CMULTIQUOTEITEMS CMULTIQUOTES
Field CLIE Table CIN Show Show Sort Function Group Grou	NT_ID CINV_TOT VOICES CINVOICE V Show	AL_B S No function Average Count Maximum Minimum	t-click on any field to bring up context menu		

6. Generating queryClick the Generate Query button.

🚱 Query Builder			
kai 9	~	×	
Generate Query Run Query	OK	Cancel	
Model Query Data			

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.

Query Builde	er		
Sal (	- <del>G</del>	) 🗸 🗙	
Generate Query	Run Query	OK Cancel	
Model Query	Data		
lick 'Run Ouery'	to see the data.	You can Export or Print Data from Corporate Settings pa	age.
CLIENT_ID S	SUM		
	4,873.00		
2	1,848.00		
3	3,103.10		
4	2,244.60		
5	4,522.00	Results of your query	
6	4,470.00		
7	4,961.13	7	
8	10.66		
9	1,715.00		
10	1,099.25		
15	8,113.00		
16	6,843.67		
17	5.039.70		

**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.

🙆 Query Builde	er			
Generate Ouery Model Query	Run Query Data	ок	Cancel	
Query Name:				
Content:				*
Description:				

Advanced International Translations

# 23. Custom reports

# 23.1. Accessing reports

*Custom reports* are used to extract and view consolidated and summary printable information from the TO3000 3D+ database.

To use custom reports, go to the Reports section of TO3000

For more information, please see: Static reports

## 23.2. Managing custom reports

### 23.2.1. Custom Reports settings

*Custom reports* can be created, edited and deleted via the **Advanced settings** window.

- 1. Click Advanced Settings in the Backstage view;
- 2. Click the **Reports** section to open the *custom report* management options.

### 23.2.2. Custom report options

The following options are available for custom reports:

- The New\Edit\Delete buttons can be used to create\modify\delete the selected report.
- The Edit Details button provides access to the Edit Custom Report window where you can change report name and description.
- The **Preview** button opens the **Preview** window where you can see how the selected report would look on paper and print it if needed.
- The **Load** and **Save** buttons will allow you to download new reports from .PX15 report files (*importing*) and save the existing reports to .*PX15* files (*exporting*).

**NOTE:** The custom reports displayed in the **Reports** section of the **Advanced settings** window, are the ones currently integrated into the TO3000 3D+ database. The *PX15* files are used solely for export-import purposes, thus deleting a *PX15* file from *C:\Users\Public\Documents\AIT\TO3000, Version 3D\Reports* will not delete any of the reports in the database.

### 23.2.3. Exporting a custom report

To export a custom report, save the required report in a .PX15 file. This file can later be imported into another TO3000 3D+ database.

- 1. Select the required *custom report* in the list.
- 2. Click the **Save** button.
- 3. Specify the name and location for the *PX15* file being saved.

### 23.2.4. Importing a custom report

You can import a custom report to your database from a *PX15* file.

To *import a custom report*, use the *PX15* file to load the required report.

1. Save the *PX15* file being imported into the *C*:\*Users*\*Public*\*Documents*\*AIT*\TO3000, Version 3D\Reports\folder.

- 2. Click the Load button.
- 3. Locate the *PX15* file being imported, select it and click the **Open** button.

### 23.2.5. Editing a custom report

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

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

For detailed information, please visit the Fast Report Inc. web-site: http://www.fast-report.com

## 23.3. 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:

📑 Data	
😑 🎼 Pro	jects (with Model)
II	PROJ_STARTED
	PROJ_DEADLINE
	PROJ_COMPLETED
	PROJ_IS_COMPLETED
	PROJ_CODE
	PROJ_FULL
····· 🔳	CLIENT_NAME
<b>I</b>	AIT\$USER_REALNAME

These are the fields from TO3000 3D+ 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:

Ino	t assigned]		
Pro	jects (with Model)	)	
	Number of records:	)	A.

Your report page should look approximately like this:

ReportTitle: ReportTitle1	
Header: Header1	
MasterData: MasterData1	📑 Projects (with Model)

#### 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,

MasterData: MasterData1	Projects (with Model)

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 3D+ 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 be selecting it and typing their width in **Properties** area:



Once all the data has been added, your report should look like this:

Header: Header 1	These are the fields you have just added	
MasterData: MasterData I	Protects (with	Mod

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.

Text	Format Highligh	t
	; <b>#</b> ≣	
Proje	cts Report	4
		~
5		
		OK Cancel

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					125		
Project Name	]	Client	] [Deadline		3		
MasterData: MasterData1				Pro	jects (with Mode		
[Projects (with	]	] [Projects (with Model). "CLIENT_NAME"] [Projects (with Model). "PROJ_DEADLINE"]					

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 3D+(so that you can send it to other TO3000 3D+ users), select the report in the list and click **Save** button.

# 24. Other Products by AIT

# 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

# 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

# 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

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