

Table of Contents

Part I Welcome to TO3000	5
Part II Registering your copy of TO3000	5
Part III TO3000 User Interface	6
1 Menu Bar	8
2 Button panel	11
3 Navigation panel	13
4 Right-click menu	17
5 Local Custom Filter	19
6 Global Date Filter	25
7 Navigating TO3000 quickly: History, Jump, Open Folders	28
Part IV Settings	31
1 Business Settings	31
Groups of Services	33
Services	34
Volume Units	36
Currencies	39
Exchange Rates	41
Taxes	43
Discounts/Markups	45
Countries	47
Payment Methods	49
2 Personal Settings	52
AnyCount	53
Colors: General	59
Colors: Status	60
Fonts and Sizes	61
Templates	62
Position of Custom Fields	64
Schedules	66
3 Advanced Settings	66
General	68
Codes	69
Folders	71
Salutations	73
Custom Fields	74
Custom Variables	79
Custom Queries	81
Custom Reports	81
CATCount	82
4 Database Settings	84

Part V Clients	86
1 Main page of the Client window	86
2 Adding a new Client	90
New Client window	93
3 Viewing and changing Client details	93
Edit Client window	105
4 Deleting a Client	106
5 Marketing story of a Client	107
6 Prices managing	111
Part VI Projects	115
1 Main Project page	115
2 Creating a new Project	118
New Project window	120
3 Modifying a Project	124
Edit Project window	126
Main page, Project Profile	127
Part VII Quotes to Clients	131
1 Creating a new Quote	132
New Client Quote window	134
New Draft Client Job window	136
2 Modifying a Quote	138
Edit Client Quote window	139
Edit Draft Client Job window	141
3 View all Quotes	142
4 Creating a Project based on the Quote	143
Part VIII Client Jobs	144
1 Project Client Jobs page	144
Project Tree page	146
2 Client Jobs window	148
3 Creating a new Client Job	150
New Client Job window	151
4 Modifying a Client Job	156
Edit Client Job window	157
5 Deleting a Client Job record	159
Part IX Invoices to Clients	159
1 Invoices page of the Client window	160
2 Invoices to Clients window	163
3 Creating a new Invoice	165
New Invoice window	166

4	Changing Invoice details	170
	Edit Invoice window	171
5	Deleting Invoices. Voided Invoices.	173
	View Voided Invoice	173
Part X Payments from Clients		174
1	Payments page of the Client window	175
2	Payments from Clients window	177
3	Adding a new Payment	179
	New Payment window	180
4	Changing Payment details	183
	Edit Payment window	185
5	Deleting a Payment	187
Part XI Schedules: tracking the Jobs/Projects accomplishment		188
1	Schedule page of the Client window	194
2	Schedule of Projects window	197
3	Schedule page of the Projects window	200
4	Schedule of Client Jobs window	202
Part XII Accounts		206
1	Account page of the Client window	207
2	Accounts of Clients window	208
Part XIII Files and Folders		209
1	Files page of the Client window	211
2	Client Folders window	213
3	Project Folders window	213
4	Files page of the Project window	214
Part XIV Business Expenses		216
1	New Business Expense window	217
2	Edit Business Expense window	220
Part XV Multi-Currency Support		221
1	Your Base Currency	221
2	Currencies and Exchange Rates	223
3	Client Currency	225
4	Prices and job accounts in different currencies	226
5	Currencies in Clients Accounts	227

Part XVI Templates	228
1 Templates	228
2 Logic of Templates	230
3 Common Template Variables	233
4 Project Template Variables	235
5 Contacts Template Variables	236
6 Quotes Template Variables	237
7 Client Jobs Template Variables	238
8 Invoice Template Variables	239
9 Payments Template Variables	242
Part XVII AnyCount	243
Part XVIII CATCount	244
Part XIX Exporting TO3000 data	247
1 Export to .TXT	248
2 Export to .XLS	248
3 Export to .CSV	250
4 Export to .HTML	250
5 Export to .RTF	252
6 Export to .PDF	253
Part XX Database Operations	255
1 Backup/Restore TO3000 database	256
2 Run Update Script	258
3 Quick Optimization	260
4 Repair	261
Index	0

1 Welcome to TO3000



Translation Office 3000

is advanced software, which easily and seamlessly integrates to the business life of

freelance translators.

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

You can either browse the help topics to learn about [Translation Office 3000 V8](#) in consecutive way or invoke context-sensitive topics of Help System from any location of [Translation Office 3000](#) by pressing F1.

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

E-mail us at:

support@translation3000.com

2 Registering your copy of TO3000

You are welcome to use [Translation Office 3000](#) free of charge during evaluation period of 30 days.

In this period software is fully functional, with some limitations on number of **Clients** (no more than 40) and **Projects** (no more than 50).

You can register your copy of **Translation Office 3000** at the Official Web site:
<http://www.translation3000.com/>

By registering, you:

- remove **Evaluation Period** limitations ;
- can enjoy features of **Translation Office 3000** for UNLIMITED time;
- become eligible for **Premium Support** at support@translation3000.com
- receive future upgrades at attractive prices;
- get that warm fuzzy feeling that you did the right thing!

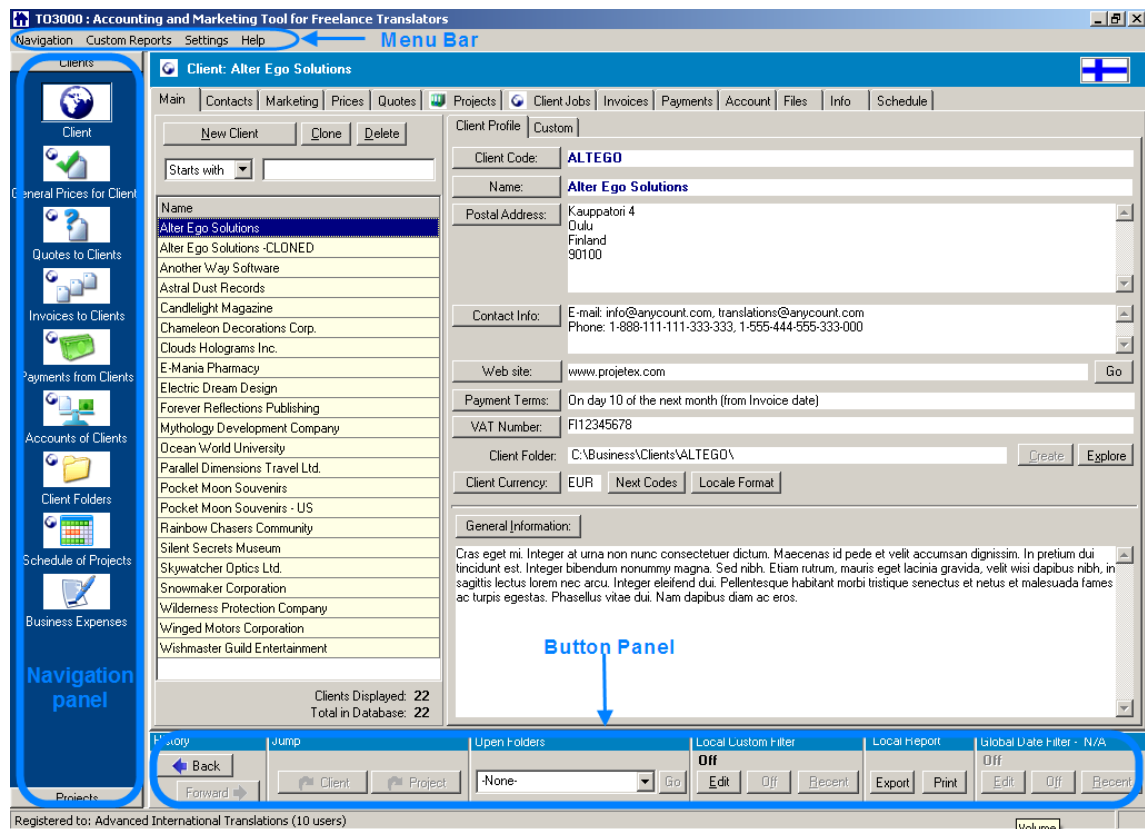
Why not register now? 😊

www.translation3000.com

3 TO3000 User Interface

User Interface of **Translation Office 3000 V8** is built around a concept of being as consistent and user-friendly as possible.

The following screenshot shows the most basic elements of **Translation Office 3000 V8** User Interface:



Menu Bar.

Menu Bar has four menus: **Navigation**, **Custom Reports**, **Settings**, and **Help**. Commands, which are available in **Navigation** menu are duplicates of icons available in **Navigation panel**. Other menus provide tools for changing your settings, creating reports, accessing **Registration** and **Help**.
More details...

Navigation panel.

Navigation panel consists of two groups of icons, providing access to different parts of TO3000:

1. **Clients** group consists of icons: **Client**, **General Prices for Clients**, **Quotes to Clients**, **Invoices to Clients**, **Payments from Clients**, **Accounts of Clients**, **Business Expenses**, **Client Folders**, **Schedule of Projects**.
2. **Projects** group consists of shortcuts: **Project**, **Client Jobs**, **Project Folders**, **Schedule of Client Jobs**.

More details...

Button panel.

Button panel contains a number of buttons groups:

- **History: Back** and **Forward** buttons; **Jump: Client** and **Project** buttons for quickly navigating your TO3000.
- **Open Folders** drop-down list and **Go** button quickens your access any folder, which was opened from TO3000 during the current working session.
- **Local Custom Filter** buttons (**Edit**, **Off**, **Recent** buttons) for managing **Local Custom Filter**, an extra handy tool simplifying the search of necessary records in your TO3000 database, allowing to filter the records according to the user specified conditions on **Client** or **Project** properties.
- **Local Report** buttons (**Export**, **Print** buttons) for exporting the data from Translation Office 3000 V8 database to other applications (you can export to .RTF, .TXT, .CSV, .XLS, .PDF, .HTML formats).
- **Global Date Filter** buttons (**Edit**, **Off**, **Recent** buttons) for managing **Global Date Filter**, a searching tool allowing to display only records which date of creation fits the specified condition.

More details...

See Also:

Personal Settings

Business Settings

Advanced Settings

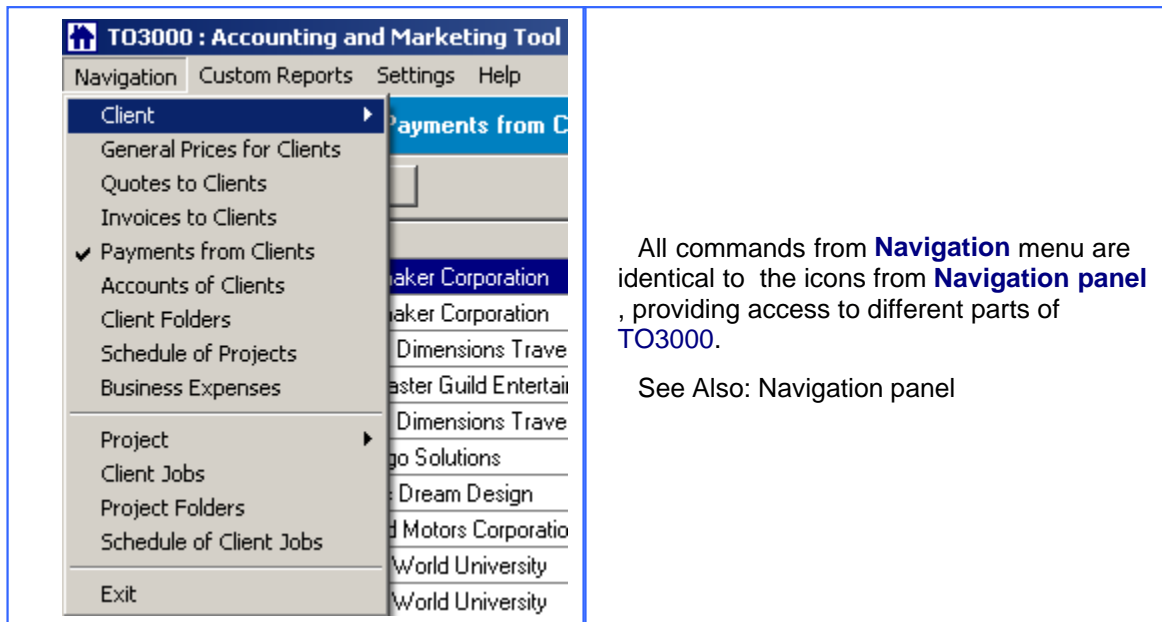
3.1 Menu Bar

Menu Bar of Translation Office 3000 V8 has four menus: **Navigation**, **Custom Reports**, **Settings**, and **Help**.

Commands available in **Navigation** menu duplicate the of icons available in **Navigation panel**. Other menus provide tools for changing your settings, creating reports, accessing **Registration** and **Help**.

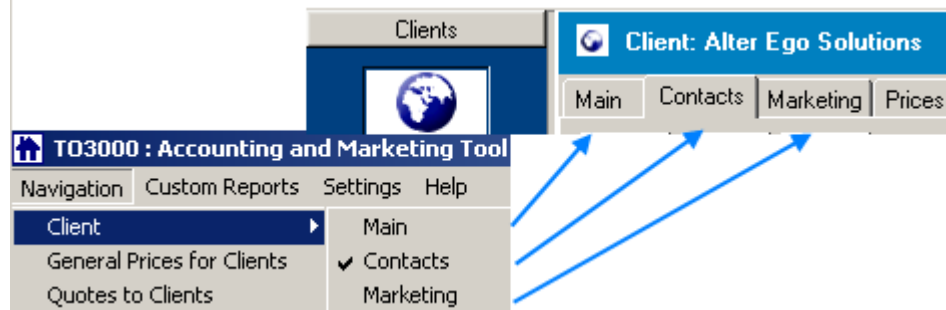
Let us take a closer look at each menu.

Navigation menu:

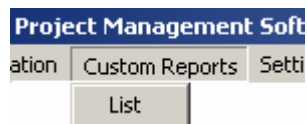


Client and **Project** commands include a small arrow on the right, by clicking on it you can find duplicates for tabs of the correspondent windows.

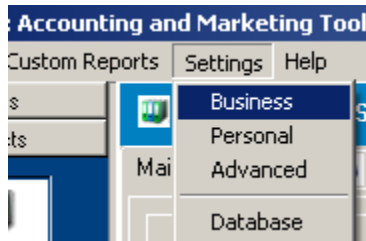
For example:



Custom Reports menu:

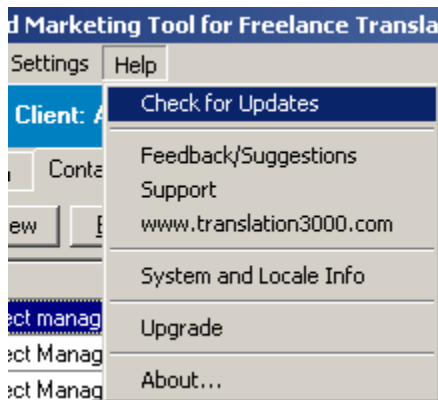


In **Custom Reports** menu there is a single **List** command. Click on it to open the Translation Office 3000 V8 **Reports-View** window.

Settings menu:

Settings menu provides access to your **Translation Office 3000 V8** settings.

Click the commands to open the correspondent settings windows: **Personal Settings**, which refer to the interface customization mostly, **Business Settings**, concerning business activity, **Advanced Settings** for customizing advanced options of **TO3000**, **Database** for general management of **TO3000** database.

Help menu:

- **Check for Updates** command opens **Checking for Updates** window.
- **Feedback/Suggestions** command opens up **Compose Message** dialog in your default email client with feedback@translation3000.com as recipient.
- **Support** command opens **Compose Message** dialog in your default email client with support@translation3000.com as recipient.
- **www.translation3000.com** command points your Internet-browser to <http://www.translation3000.com/>
- **System and Locale Info** displays **System Information** window with your system and locale information, which could be useful in case of writing to customer support.
- **About** command shows a nice window with **Translation Office 3000 V8** logo, **License** information and **Build** number of your copy of **Translation Office 3000 V8**.

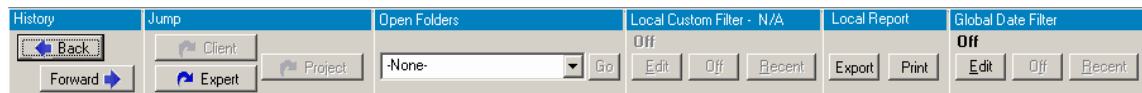
See Also: Translation Office 3000 V8 User Interface

See Also: Navigation panel

See Also: Button panel

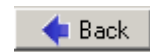
3.2 Button panel

Button Panel is a component of Translation Office 3000 V8 interface located in its bottom part:



It consists of six groups of buttons: **History**, **Jump**, **Open Folders**, **Local Custom Filter**, **Local Report**, **Global Date Filter**.

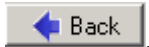
History buttons.



switches TO3000 to the previously visited page or window.



brings you back to the page or window that was active before you clicked



Jump buttons.

On clicking  you jump to the **Client** window, the page depends on the window opened and the element selected at the moment you clicked.

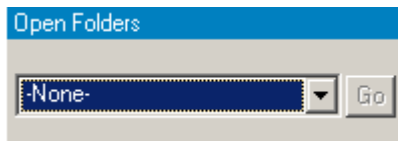


button works similarly to .



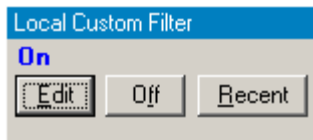
switches to certain page of **Project** window, displaying data for selected **Project**.

Open Folders.




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

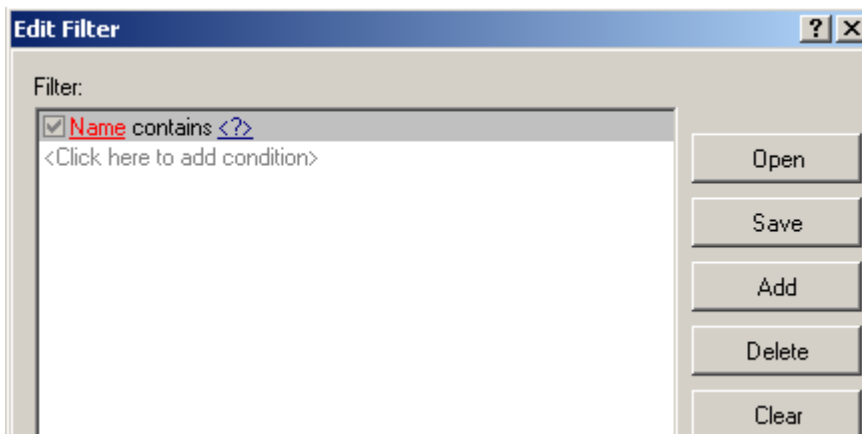
Local Custom Filter buttons.



Use **Local Custom Filter** buttons to construct filter conditions, thus simplifying the search of necessary records in your TO3000 database. For example, you can build the filter to display only **Projects** of the particular **Client Project Manager** which are due today.

 **Note:** **Local Custom Filter** is available only when TO3000 is switched to the **Main** page of the **Client** or **Project** window.

Edit button opens Edit Filter window. The general view:



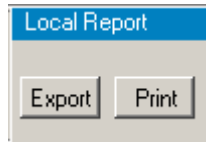
 **Note:** Conditions can be set on the Custom Fields of the **Client** or **Project** as well.

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

Recent button switches on the last created filter.

See Also: Using Local Custom Filter

Local Report buttons.



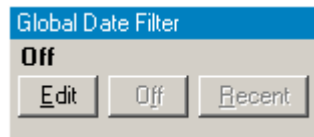
Local Report buttons give you the possibility to save the content of the currently opened window of TO3000 (save it in a separate file of defined format or print).

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

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

See Also: Exporting TO3000 data

Global Date Filter buttons.



Global Date Filter buttons are designed to filter the displayed records according to the set date of creation conditions.

Edit button opens Edit Global Date Filter window.

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

Recent button switches on the last created data filter.

See Also: Using Global Date Filter.

See Also:

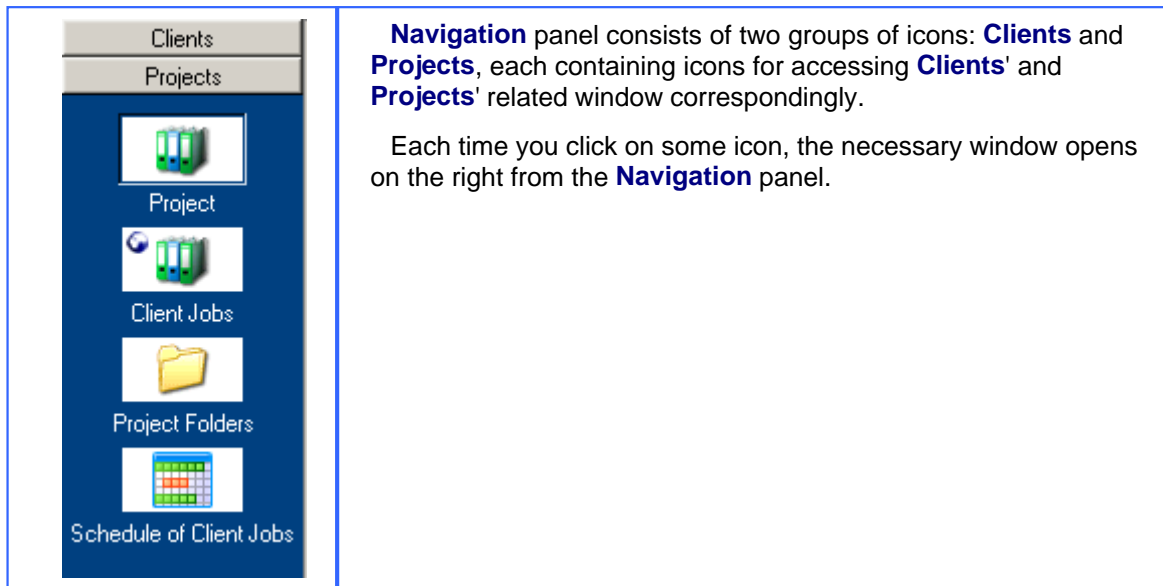
Translation Office 3000 V8 User Interface

Navigation panel

Menu Bar

3.3 Navigation panel

Navigation panel is a part of TO3000 user interface simplifying and quickening navigation in the TO3000:



Navigation panel consists of two groups of icons: **Clients** and **Projects**, each containing icons for accessing **Clients'** and **Projects'** related window correspondingly.

Each time you click on some icon, the necessary window opens on the right from the **Navigation** panel.

Icons for Client related windows:



Clicking **Client** icon displays **Client** window containing all information about the taken **Client**. By going to various pages (**Main, Contacts, Marketing, Prices, Quotes, Projects, Client Jobs, Invoices, Payments, Account, Info, Files, Schedule**) you can add/delete items of **Client** list, view/change financial and informational records of taken **Client**.

See Also: Adding a new Client

See Also: Viewing and changing Client details



General Prices for Clients icon opens **General Prices for Clients** window, where you can manage your general (not including **Discounts/Markups**) price-list: set **Price** in chosen **Currency** for each **Service** (choose from the **Services** list) of each **Group of Services** (choose from the **Groups of Services** list).

See Also: General Prices for Clients window.

See Also: Services

See Also: Group of Services

See Also: Discounts/Markups



Quotes to Clients icon opens **Quotes to Clients** window where you can see details of all currently created **Client Quotes**, create a new **Project** based on the **Quote**, add/edit/delete **Draft Client Jobs** for existing **Quotes**.

See Also: Quotes to Clients window

<p>Next three icons, Invoices to Clients, Payments from Clients and Accounts of Clients provide access to corresponding windows displaying all Invoices, Payments and Accounts from the database. See Also: Invoices to Clients window See Also: Payments for Clients window See Also: Accounts of Clients window</p>	A vertical stack of three blue square icons. The top icon shows three documents and is labeled "Invoices to Clients". The middle icon shows a green folder and is labeled "Payments from Clients". The bottom icon shows a computer monitor and is labeled "Accounts of Clients".
---	---



Business Expenses icon displays **Business Expenses** window where you can enter and manage information about your business expenses.

See Also: Business Expenses



Client Folders icon opens **Client Folders** window where you can access files and folders like in **Microsoft Windows Explorer** window, though its scope is limited to **Client Folders**, which are located in C:\Business\Clients\ (unless other specified in the **Advanced Settings**).

See Also: Client Folders window

See Also: Advanced Settings



Schedule of Projects icon displays the **Schedule of Projects** window where you can see all pending, due/overdue projects (for all clients) for the time period specified.

See Also: Schedule of Projects

Icons for Project related windows:



Project icon displays **Project** window containing all information about the taken **Project**. By going to various pages (**Main**, **Tree**, **Client Jobs**, **Info**, **Files**, **Schedule**) you can add/delete items of the **Project** list, view/change financial, jobs and informational records of taken **Project**.

See Also: Project window



Client Jobs icon opens **Client Jobs** window which displays detailed information about all **Client Jobs** stored in TO3000 database.

See Also: Client Jobs window



Project Folders icon opens **Project Folders** window where you can access files and folders like in Microsoft Windows Explorer window, though its scope is limited to **Projects** folder, which is located C:\Business\ unless other specified in **Advanced Settings** of TO3000.

See Also: Project Folders window

See Also: Advanced Settings



Schedule of Client Jobs icon provides access to the **Schedule of Client Jobs** window where you can see all pending, due/overdue client jobs (and the projects they concern to) for the specified time period.

See Also: Schedule of Client Jobs

See Also:

Translation Office 3000 V8 User Interface

Menu Bar

Button panel

3.4 Right-click menu

Most of the TO3000 pages contain lists of records (**Client Jobs** list, **Projects** list etc.).

Right-clicking on the list opens a menu containing two commands: **Customize Columns** and

Vertical View. For example:

Parallel Dimensions Travel Ltd.	18/01/2006 00:00
Parallel Dimensions Travel Ltd.	01/12/2005 00:00
Parallel Dimensions Travel Ltd.	005 00:00
Parallel Dimensions Travel Ltd.	006 00:00

Customize Columns
Vertical View

Click **Customize Columns** to open **Customize columns** dialog. Here you can select what columns (i.e. what record properties) to display clicking the correspondent options and change the order of the columns using **Move Up/Move Down** buttons (the first column is the most left one in the list). For example:

Client	Assigned	Project Code
Parallel Dimensions Travel Ltd.	15/05/2005 00:00	0032
Parallel Dimensions Travel Ltd.	20/01/2006 00:00	0032
Parallel Dimensions Travel Ltd.	04/01/2006 00:00	0032
Parallel Dimensions Travel Ltd.	18/01/2006 00:00	0032
Parallel Dir		0032
Parallel Dir		0032
Parallel Dir		0032

<input checked="" type="checkbox"/> Client	Move Up
<input checked="" type="checkbox"/> Assigned	Move Down
<input checked="" type="checkbox"/> Project Code	
<input type="checkbox"/> Project	
<input type="checkbox"/> Code	
<input checked="" type="checkbox"/> Client Ref.	
<input checked="" type="checkbox"/> Deadline	
<input checked="" type="checkbox"/> Completed	
<input type="checkbox"/> Group of Services	
<input type="checkbox"/> Service	
<input type="checkbox"/> Pricing	
<input type="checkbox"/> Units	
<input type="checkbox"/> Volume	
<input type="checkbox"/> Price	
	Ok
	Cancel

Click **Vertical View** to see the selected record in a vertical view (thus all fields will be visible, no need to scroll). For example:

Client	Assigned	Project Code	Client Ref.
Parallel Dimensions Travel Ltd.	15/05/2005 00:00	0032	
Parallel Dimensions Travel Ltd.	20/01/2006 00:00	0032	
Parallel Dimensions Travel Ltd.	04/01/2006 00:00	0032	
Parallel Dimensions Travel Ltd.	15/01/2006 00:00	0032	
Parallel Dimensions Travel Ltd.			
Parallel Dimensions Travel Ltd.			
Parallel Dimensions Travel Ltd.			

Client	Parallel Dimensions Travel Ltd.
Assigned	20/01/2006 00:00
Project Code	0032
Client Ref.	
Deadline	20/01/2006 18:00
Completed	<input type="checkbox"/>
Job Total	529.00
Client PM	Lane Ellis Annan
Job Name	Thermal Displacement Guide - power redirection

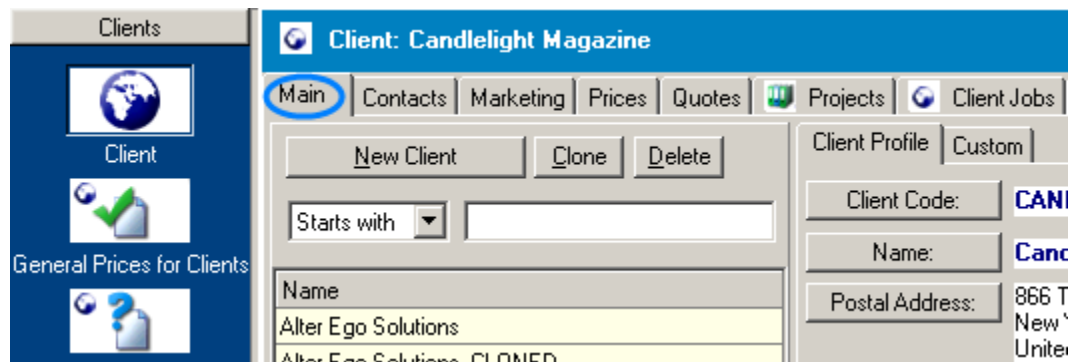
See Also: TO3000 User Interface

3.5 Local Custom Filter

Local Custom Filter is an extra handy filter tool provided by [Translation Office 3000 V8](#). You can use it to search for **Clients** or **Projects** which correspond to particular conditions.

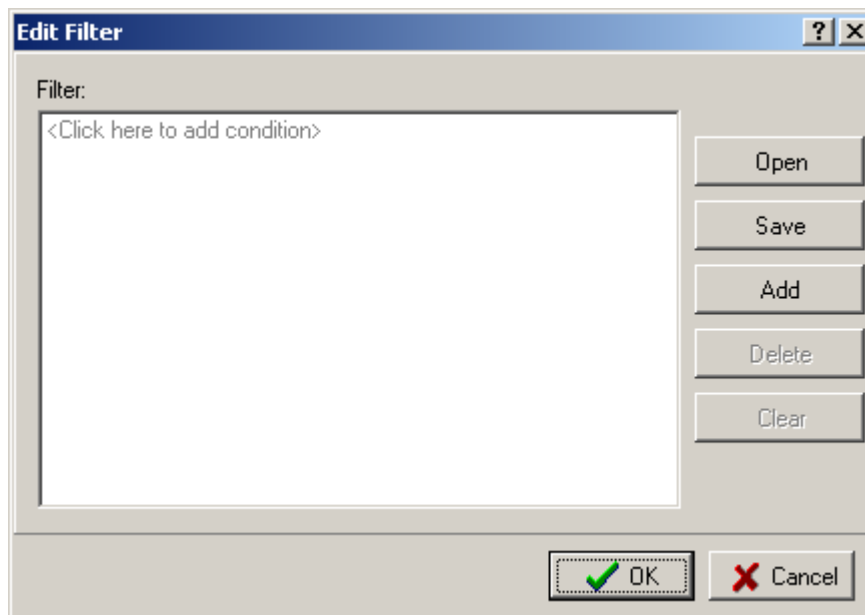
For example, you can construct the filter to display only **Projects** of the particular **Client Project Manager** which are due today.

Local Custom Filter is available in the bottom part of the [Translation Office 3000 V8](#) interface when you are switched to the **Main** page of the **Client** or **Project** window:

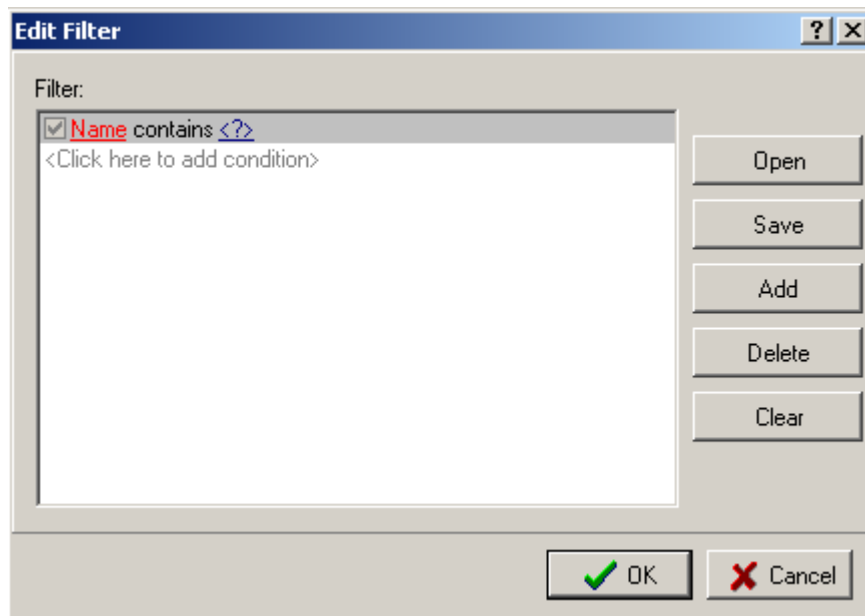


To create a filter

1. Click **Edit** button. The **Edit Filter** dialog box will appear, in which you can specify a criterion for search.

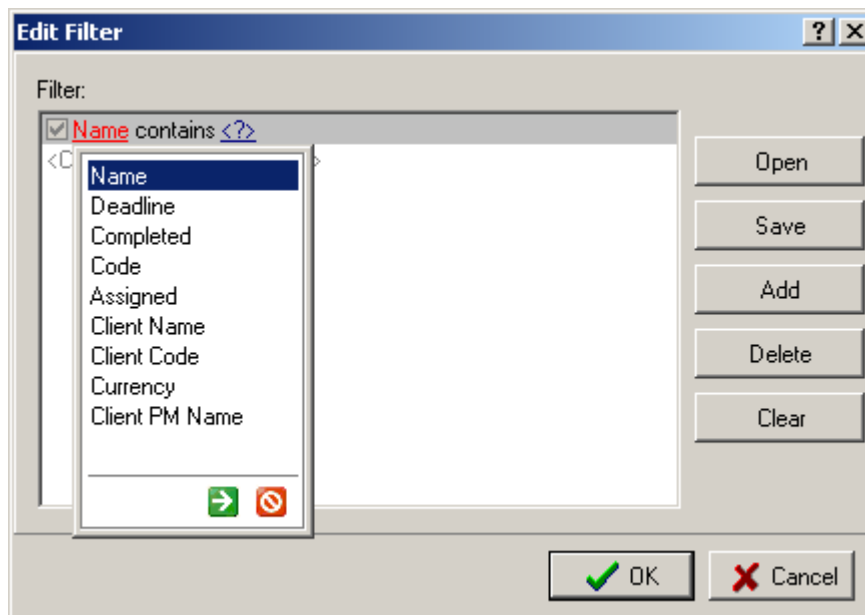


2. Click on the "<Click here to add condition>" string or click **Add** button to add a new condition line.

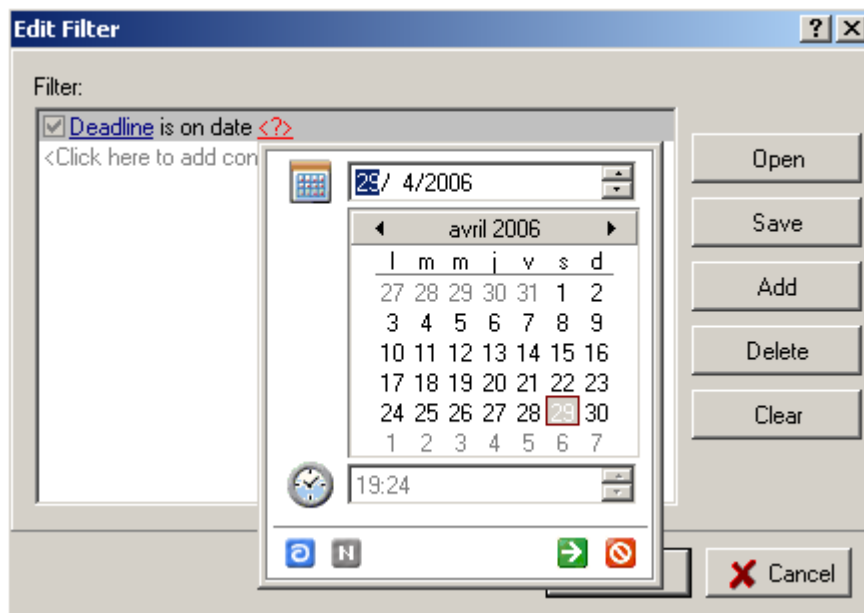


3. Click on the "Name" string to select the property for setting conditions at. The set of available properties differs for each window or page (**Clients**, **Project** etc.). On the following screenshot **Local Custom Filter** for the **Project** related records is displayed:

 **Note:** Custom fields (from Custom tab of the Main page are available in these lists as well).

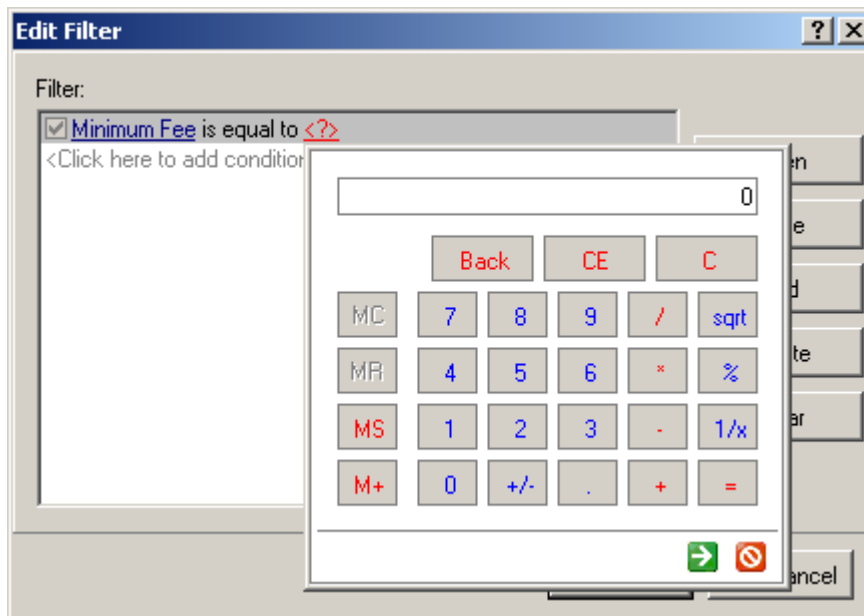


4. Click on "contains" string to select the type of condition expression:



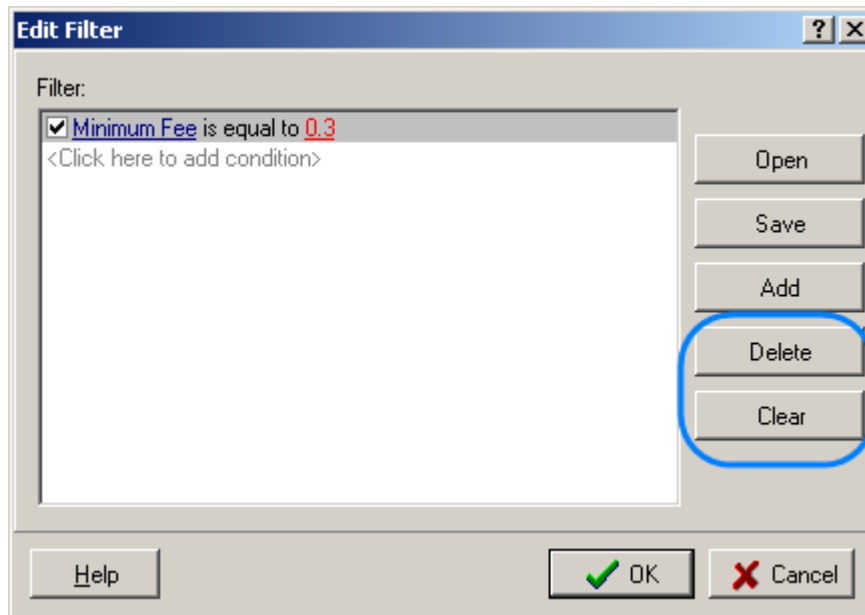
5. Click on the "<?>" string to set the value of the condition expression for the selected property. Click the green arrow pictogram to apply selection or the red pictogram next to it to cancel the selection.

The view of the pop-up window displayed for setting value of the condition expression depends on the property, it can be either calculator (as on the screenshot below) or text field.



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

To delete a condition line select it and click **Delete** button in the right part of the **Edit Filter** window;
to clear all added condition lines click **Clear** button in the right part of the **Edit Filter** window:

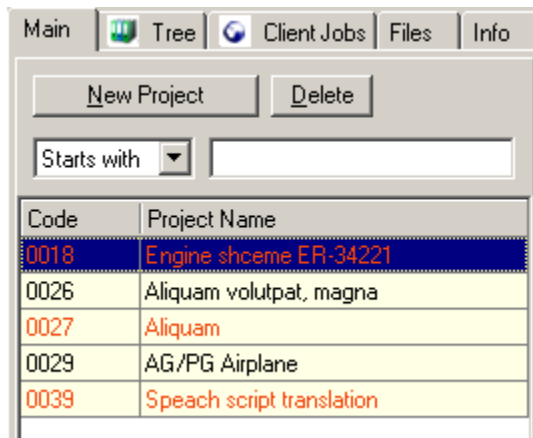


6. After specifying all necessary conditions, you can click **OK** to switch on the filter or click **Save** button on the right first to save this set of conditions (so that you will not need to recreate it next time you want to select the item basing on such conditions).

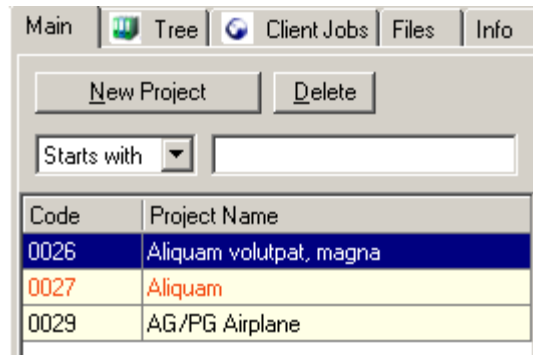
When the filter is switched on only records corresponding to the conditions of the filter are displayed.

➔ **Example:**

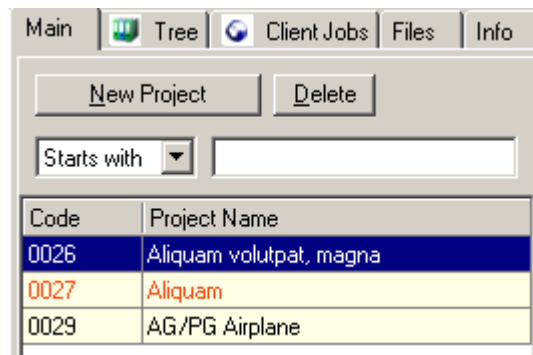
Here is the list of **Projects** when no filter is switched on:



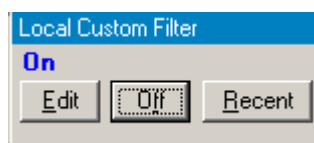
We created the following simple filter:



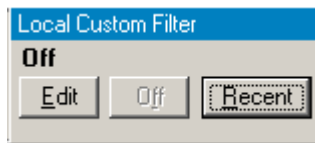
When we switch on this filter, only **Projects**, whose **Name** starts with "A" /"a" will be displayed:



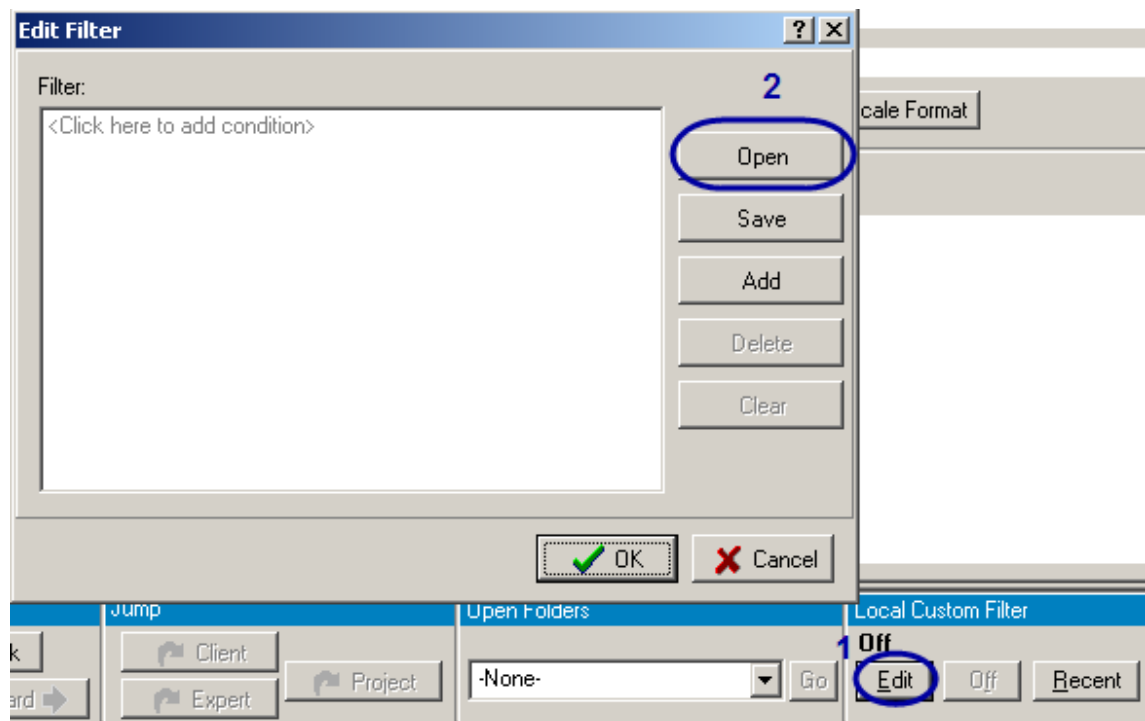
To **switch off** the filter click **Off** button:



To **switch on** the last used filter (no matter if it was saved or no) click **Recent** button:



To **open** earlier saved filter click **Edit** button and then **Open** button of the **Edit Filter** window:

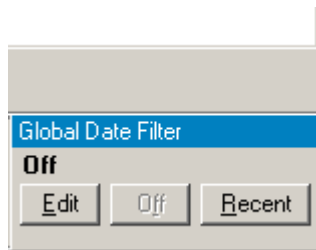


See Also: Using Global Date filter

3.6 Global Date Filter

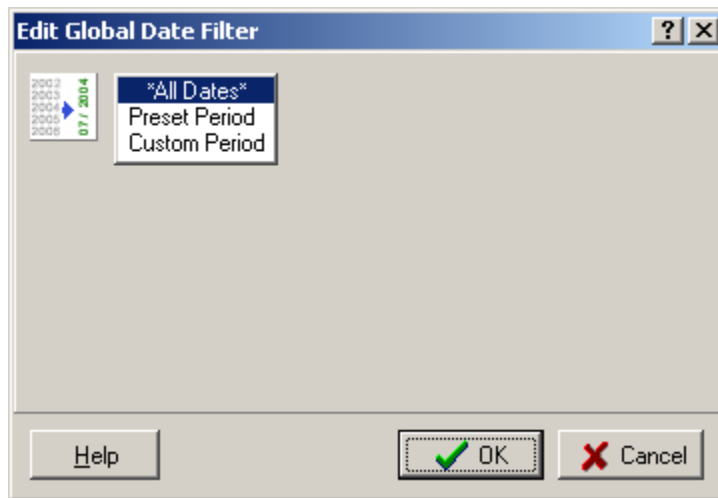
Global Date Filter influences the set of financial records displayed in pages or windows where it is available. Using this filter you can select to view the records which fit the certain date interval.

The **Global Date Filter** is available from the **Clients** group of windows: **Marketing, Quotes, Projects, Client Jobs, Invoices, Payments** and **Account** pages of **Client** window, and from the **Quotes to Clients, Invoices to Clients, Payments from Clients, Accounts of Clients** and **Business Expenses** windows; from the **Projects** group: **Main, Tree, Client Jobs** pages and **Client Jobs** window. The **Global Date Filter** panel is displayed in the bottom right corner of the TO3000 window:

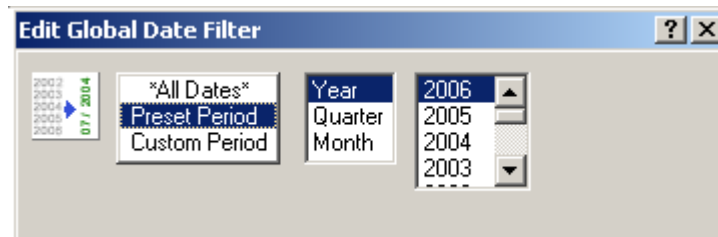


Setting a new date interval for the records displayed.

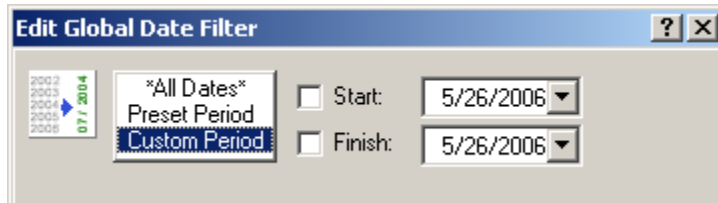
1. Click **Edit** button from the **Global Date Filter** panel. The **Edit Global Date Filter** will open.



2. Select **Preset Period** if the period you want to specify is limited by year/quarter/month:

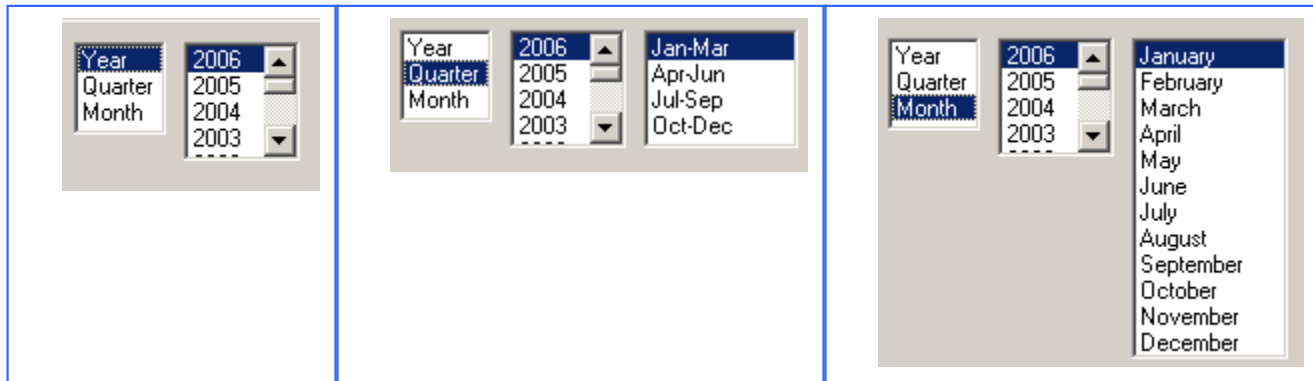


- or select **Custom Period** if you need to specify the concrete dates:

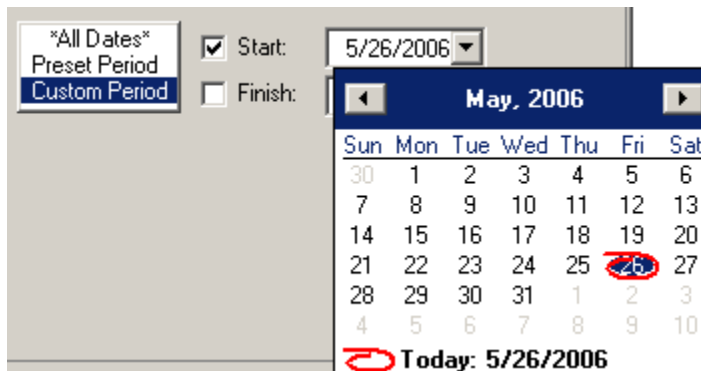


3. If you have selected:

- **Preset Period**, select the **Year**, **Quarter** or **Month** interval and then the concrete value:

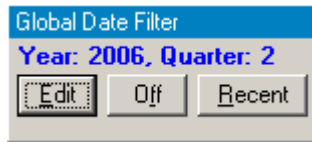


- **Custom Period**, select the **Start** and/or **Finish** options and specify the concrete dates using the correspondent drop-down calendars:



4. Click **OK** to switch on the filter or click **Cancel** to disannul the filter setting.


After the filter is switched on, only the records which date of creation fits the specified condition are displayed. The specified period is displayed on the **Global Date Filter** panel. For example:




To switch off the **Global Date Filter** click **Off** button. When the **Filter** is turned off, the text above its buttons displays **Off** label:



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

 **Note: Global Date Filter** has really global nature. If you change it in one page or window, it will change globally. Defined limits will affect displaying of all records within **Translation Office 3000** where **Global Date Filter** panel is available.

 **Note: Global Date Filter** setting is saved when you close the program and will be used next time you run **Translation Office 3000**.

See Also:

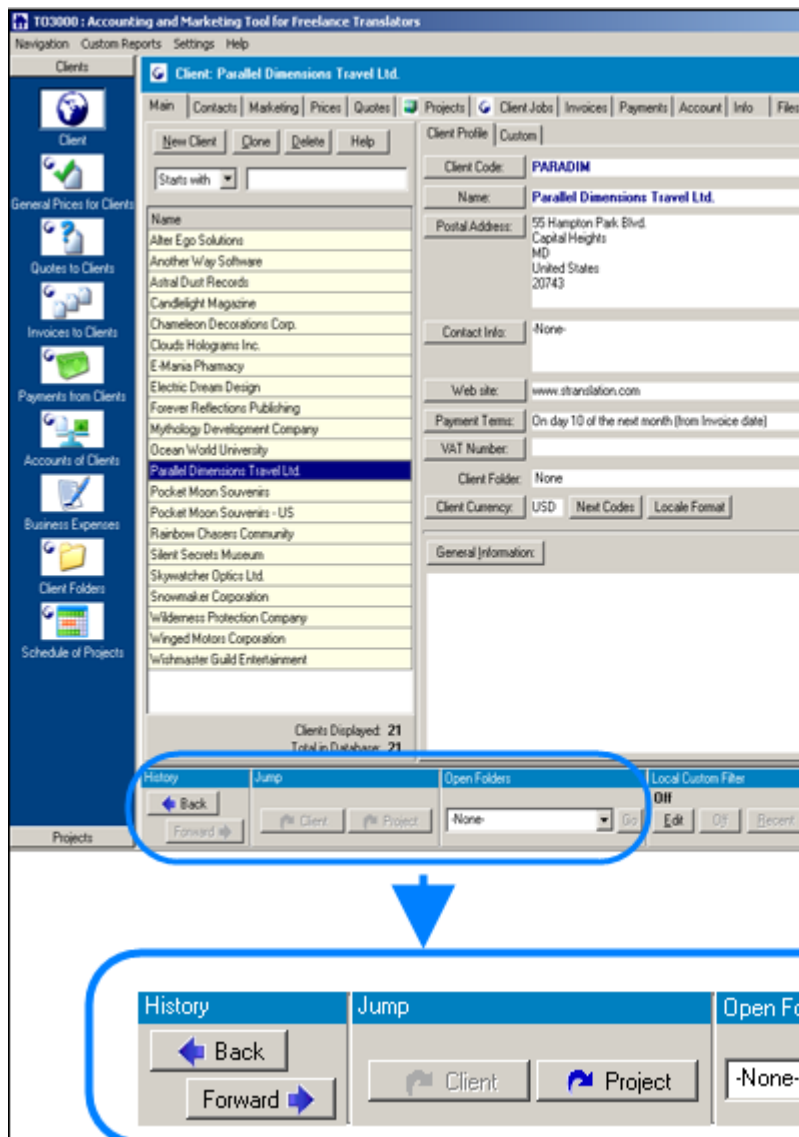
Using Local Custom Filter

TO3000 User Interface

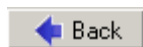
3.7 Navigating TO3000 quickly: History, Jump, Open Folders

We try to make your work with **Translation Office 3000** easy and pleasant at most.

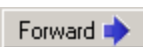
That is why **TO3000** is equipped with number of functions for quick access to different parts of its interface and folders.



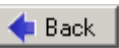
History buttons.




switches the content of TO3000 window to previously visited page or window.



brings you back to the page or window that was opened before you clicked

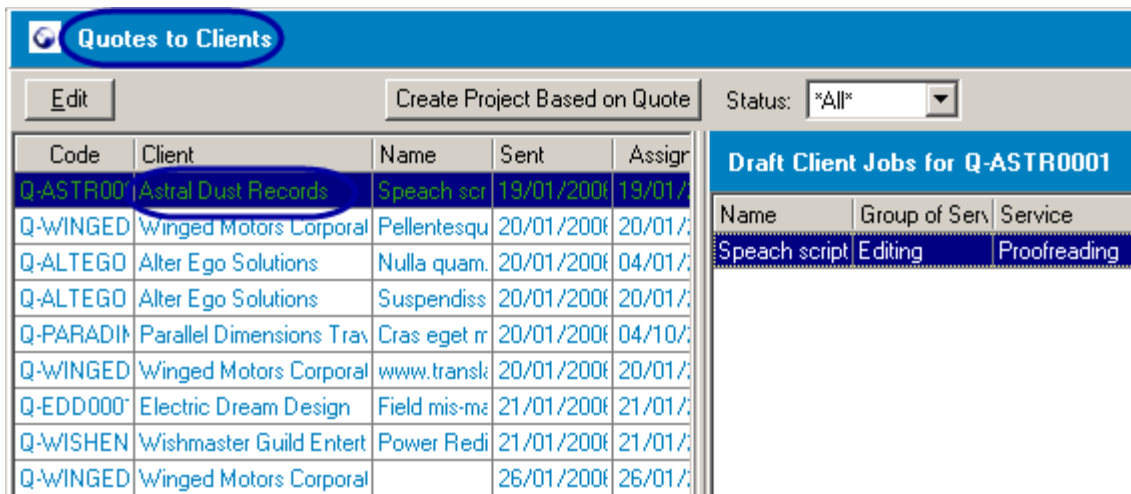


Jump buttons.

Clicking  you jump to the **Client** window, the page depends on the current content of TO3000 window and selected element at the moment you clicked.


For example,

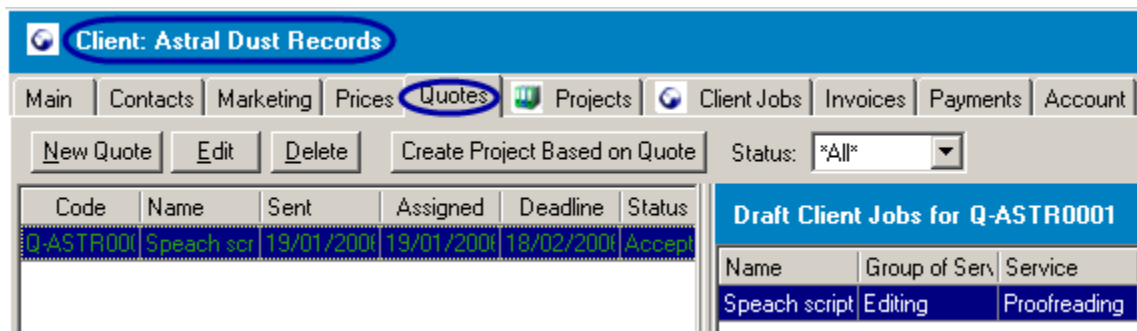
Quotes to Clients window is opened, "Astral Dust Records" **Client** record is selected from the list:



Code	Client	Name	Sent	Assign
Q-ASTR001	Astral Dust Records	Speech scr	19/01/2006	19/01/2006
Q-WINGED	Winged Motors Corporal	Pellentesqu	20/01/2006	20/01/2006
Q-ALTEGO	Alter Ego Solutions	Nulla quam.	20/01/2006	04/01/2006
Q-ALTEGO	Alter Ego Solutions	Suspendiss	20/01/2006	20/01/2006
Q-PARADIT	Parallel Dimensions Trav	Cras eget m	20/01/2006	04/10/2006
Q-WINGED	Winged Motors Corporal	www.transk	20/01/2006	20/01/2006
Q-EDD000	Electric Dream Design	Field mis-m	21/01/2006	21/01/2006
Q-WISHEN	Wishmaster Guild Entert	Power Redi	21/01/2006	21/01/2006
Q-WINGED	Winged Motors Corporal		26/01/2006	26/01/2006


Name	Group of Serv	Service
Speech script	Editing	Proofreading

If you click  the content of TO3000 switches to the **Quotes** page of **Client** window displaying data for client Astral Dust Records:

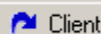



Code	Name	Sent	Assigned	Deadline	Status
Q-ASTR001	Speech scr	19/01/2006	19/01/2006	18/02/2006	Accept

Name	Group of Serv	Service
Speech script	Editing	Proofreading

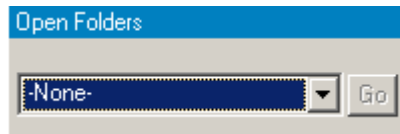
 Project

button works similarly to

 Client

 **Project** switches to the certain page of the **Project** window, displaying data for selected **Project**.

Open Folders



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

➔ **Example:** If you opened Astral Dust Records client folder first, then Candlelight Magazine client folder, they appear in the **Open Folders** drop-down list and you can quickly switch between them as described above:



See Also:

TO3000 User Interface

Button panel

4 Settings

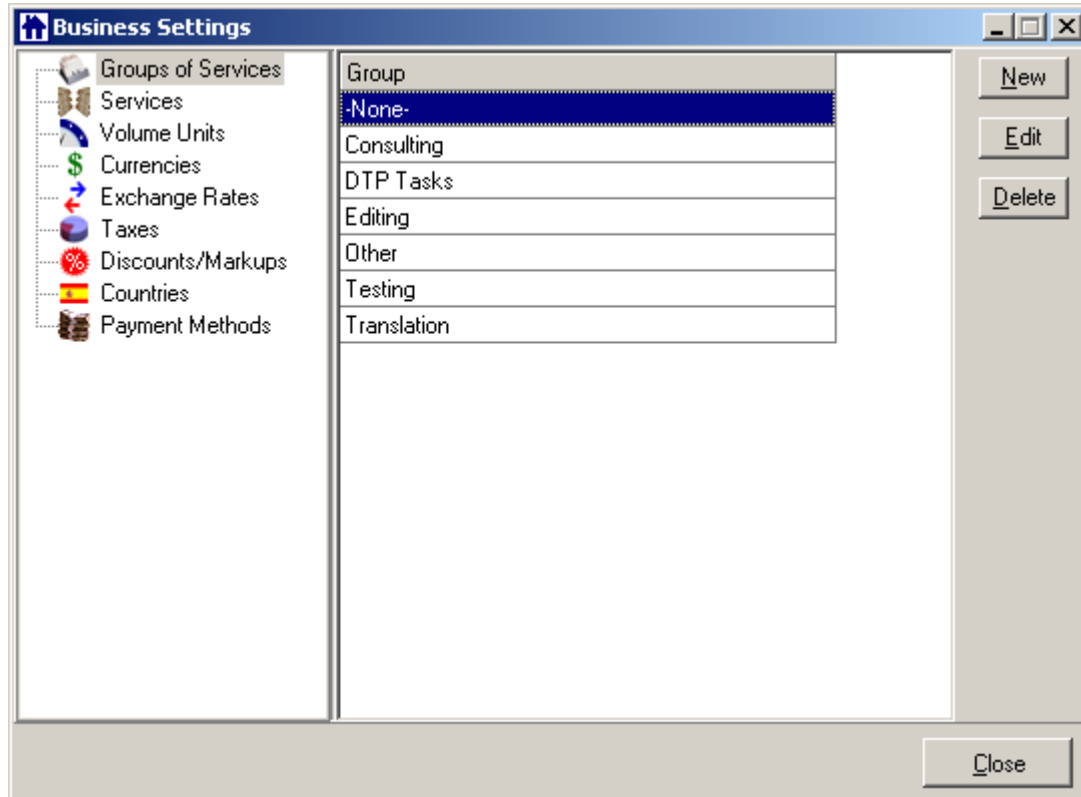
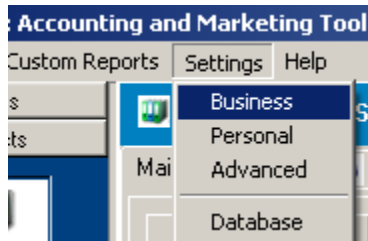
4.1 Business Settings

Though similar in general, each freelance business activity has its own special features. That is why we made **Translation Office 3000 V8** easily customizable.

Translation Office 3000 V8 settings are divided into three logical groups: **Business**, **Personal** and **Advanced** settings.

Translation Office 3000 V8 settings concerning business activity are specified on the **Business Settings** window.

To open **Business Settings** window click menu **Settings > Business** command.



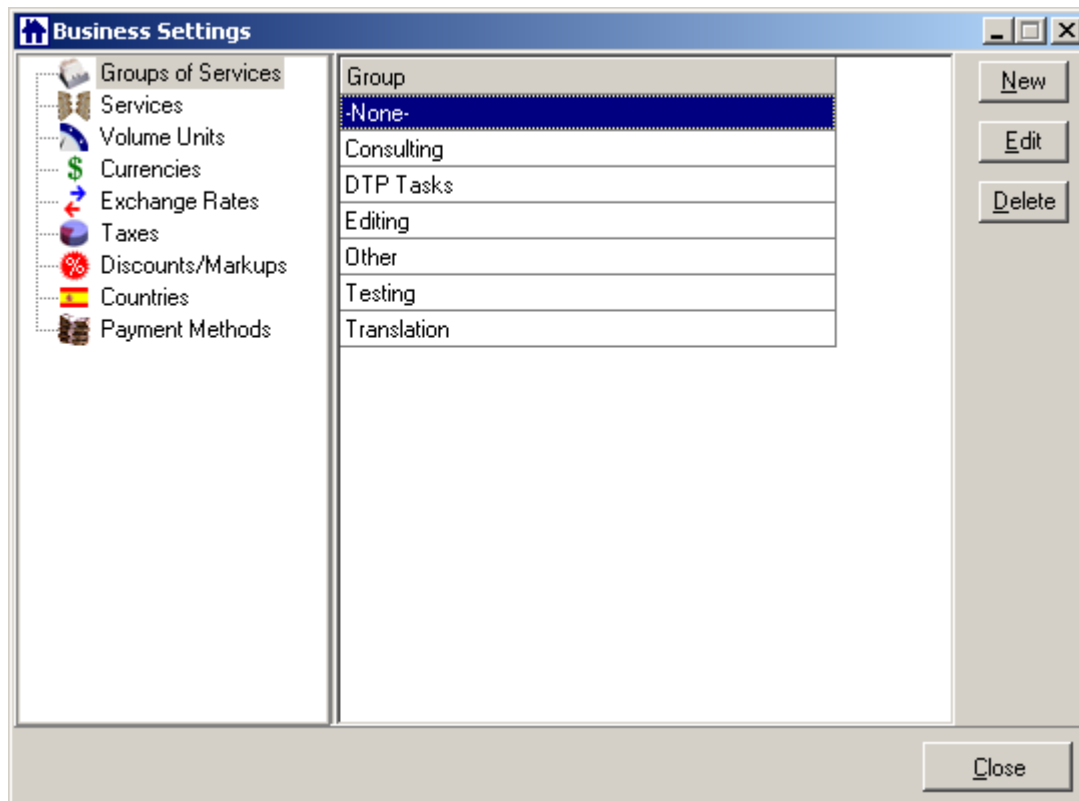
For details on each page of **Business Settings** see:

- **Groups of Services**
- **Services**
- **Volume Units**
- **Currencies**
- **Exchange Rates**
- **Taxes**
- **Discounts/Markups**
- **Countries**
- **Payments Methods**

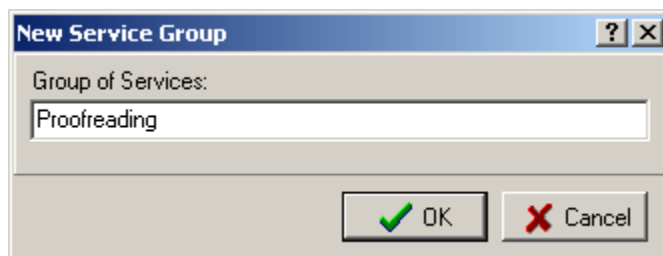
4.1.1 Groups of Services

On **Groups of Services** page you can specify the kinds of services (groups of services, in other words) you offer to your clients (e.g. translating, editing etc.). When creating jobs or setting prices in **Translation Office 3000 V8** you will have the possibility to specify the group of services, selecting it from the list created here.

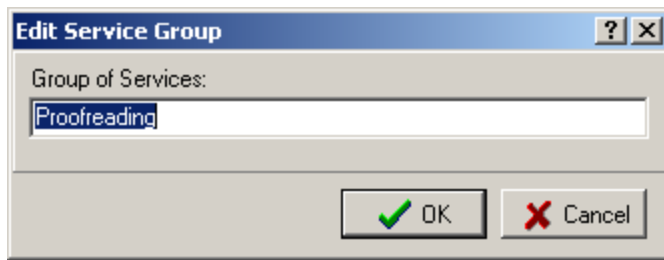
To open the **Groups of Services** page click menu **Settings > Business Settings**. **Groups of Services** page is displayed automatically when **Business Settings** window opens.



To create a new **Group of Services** click **New** button and enter the name of the **Group** in the **New Service Group** window displayed.



To edit the existing **Group** select it from the list, click **Edit** button and make necessary changes in the **Edit Service Group** window displayed:



To delete the existing **Group** select it from the list and click **Delete** button. The **Group** will be deleted after your confirmation.

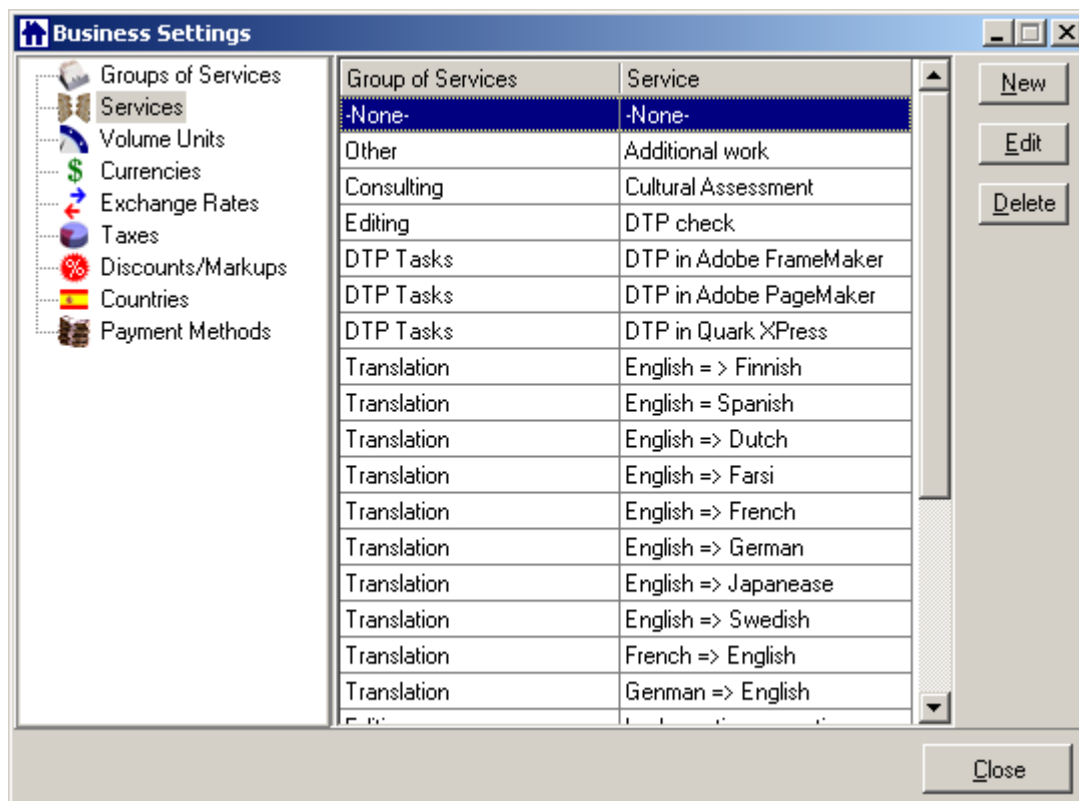
See Also: Personal Settings

See Also: Advanced Settings

4.1.2 Services

On the **Services** page of the **Business Settings** window page 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 **Translation Office 3000 V8** you will have the possibility to specify the services, selecting it from the list created here.

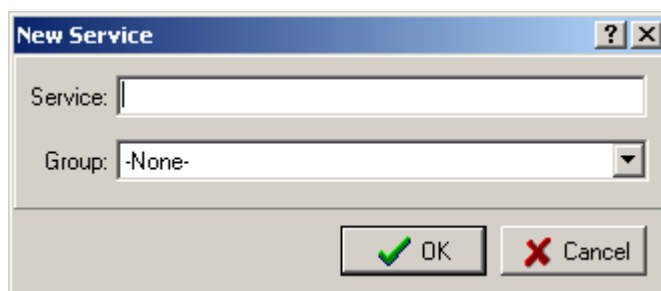
To open **Services** page click **Services** in the left part of the Business Settings window.



Each **Service** belongs to some **Group of Services**. That is why each record in the **Services** list consists of two fields: **Group of Services** and **Service** itself.

To add a new Service:

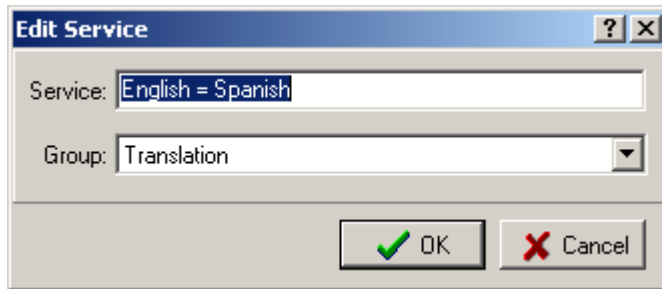
1. Click **New** button.
2. In the **New Service** window displayed enter the name of **Service** and select the **Group of Services** it refers to from the corresponding drop-down list.



3. Click **OK** to save the new **Service** and close **New Service** window (or click **Cancel** to exit without saving).

To edit the existing Service:

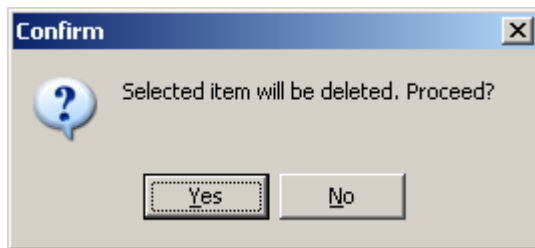
1. Select it from the list.
2. Click **Edit** button.
3. Make necessary changes on the **Edit Service** window displayed.



4. Click **OK** to save changes and close **New Service** window (or click **Cancel** to quit without saving).

To delete the existing Service:

1. Select it from the list.
2. Click **Delete** button.
3. Confirm deleting on the **Confirm** dialog box:

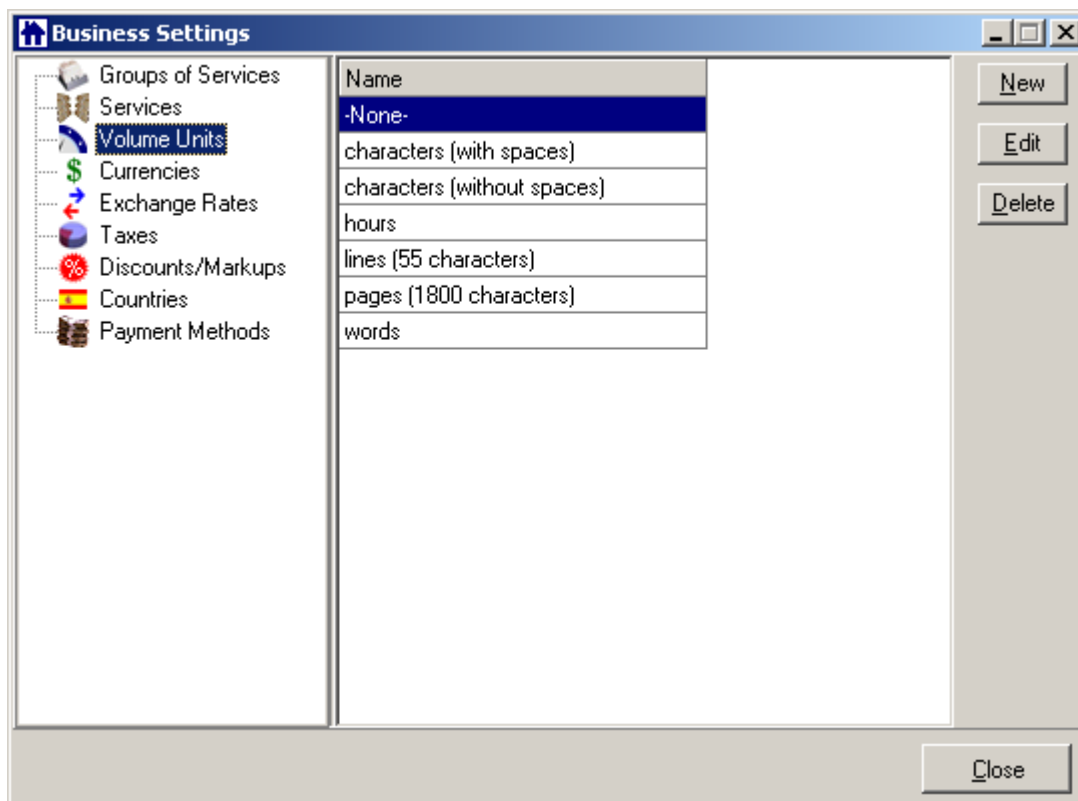


See Also: Personal Settings

See Also: Advanced Settings

4.1.3 Volume Units

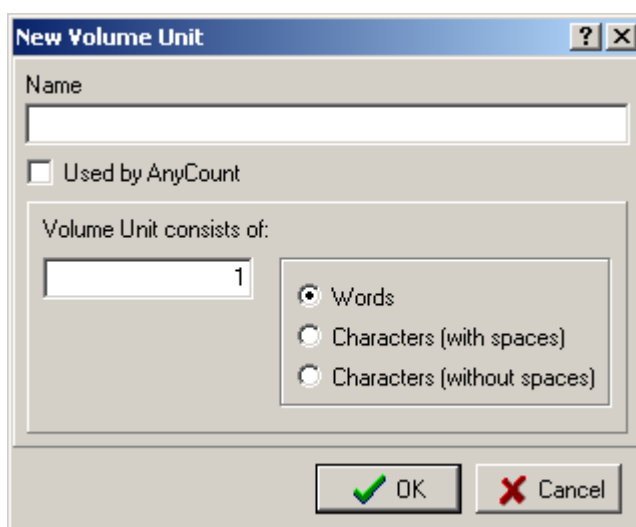
On the **Volume Units** page of the **Business Settings** window you can create and manage the list of volume units, which you will use for estimating jobs volume.



To open **Volume Units** page click **Volume Units** the left part of the Business Settings window.

To add a new Volume Unit:

1. Click **New** button. **New Volume Unit** window opens:



2. Enter the name of the unit.
3. If the unit you are creating consists of words/characters (with or without space) and you want to use it for text counting with built-in AnyCount:

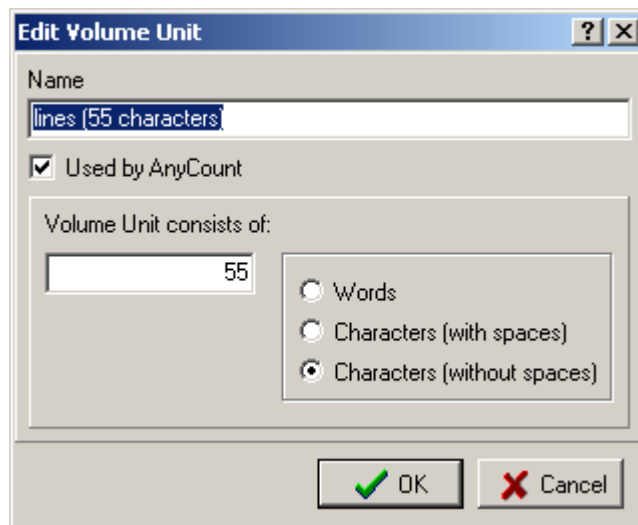
- select **Used by AnyCount** option;
- carefully specify if it consists of words/characters (with or without spaces) selecting the correspondent option and number of words/characters in the new unit. (For example, volume unit "lines" can consist of 55 characters without spaces).

If the unit does not refer to texts volume, e.g. "hours", leave **Used by AnyCount** option unselected and do not pay attention to **Words/Characters (with spaces)/Characters (without spaces)** options.

4. Click **OK** to save changes and close **New Volume Unit** window or click **Cancel** to quit without saving.

To edit the existing Volume Unit:

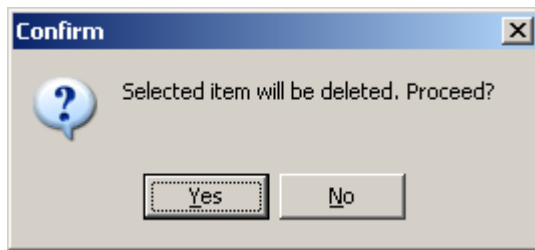
1. Select it from the list.
2. Click **Edit** button.
3. Make necessary changes on the **Edit Volume Unit** window displayed.



4. Click **OK** to save changes and close **Edit Volume Unit** window (or click **Cancel** to quit without saving).

To delete the existing Volume Unit:

1. Select it from the list.
2. Click **Delete** button.
3. Confirm deleting on the **Confirm** dialog box:

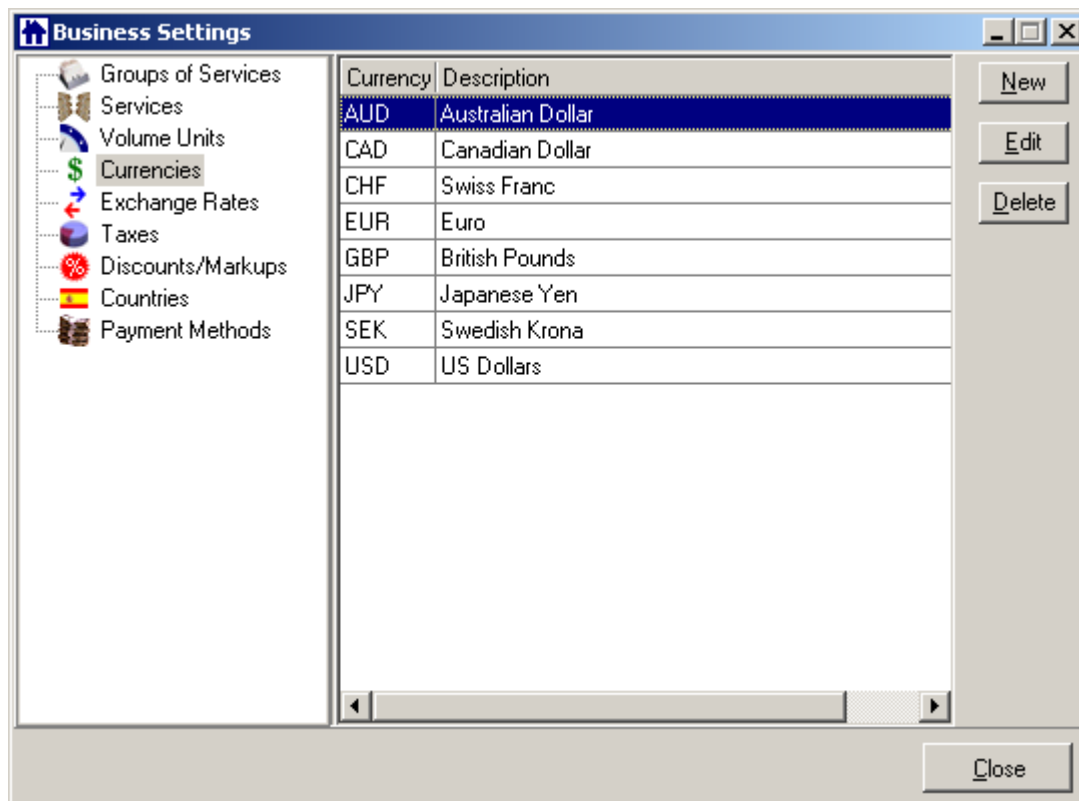


See Also: Personal Settings

See Also: Advanced Settings

4.1.4 Currencies

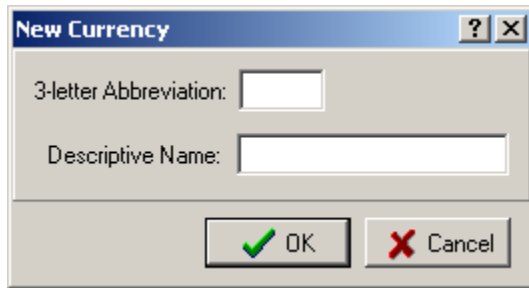
On the **Currencies** page of the **Business Settings** window you can create and manage the list of currencies, which you will be able to use in all **Translation Office 3000 V8** financial records.



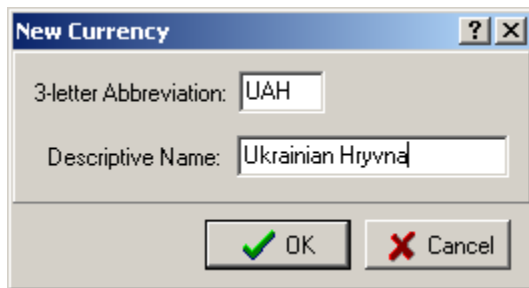
To open **Currencies** page click **Currencies** in the left part of the Business Settings window

To add a new Currency:

1. Click **New** button. **New Currency** window opens.



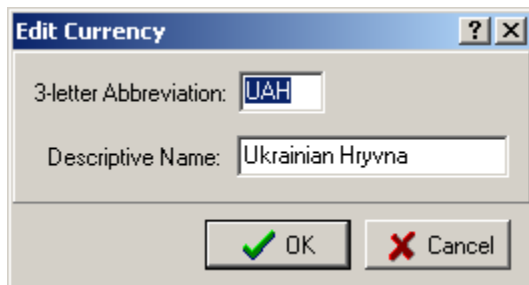
2. Enter the 3-letter abbreviation for the new currency (everywhere in **Translation Office 3000 V8** currencies are referred to by these 3-letter abbreviations) and the description of the currency (i.e. long name) in the corresponding fields. For example:



3. Click **OK** to save changes and close **New Currency** window or click **Cancel** to quit without saving.

To edit the existing Currency:

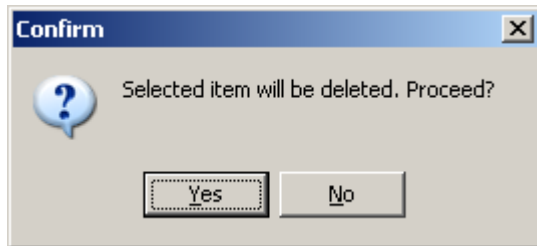
1. Select it from the list.
2. Click **Edit** button.
3. Make necessary changes on the **Edit Currency** window displayed.



4. Click **OK** to save changes and close **Edit Currency** window or click **Cancel** to quit without saving.

To delete the existing Currency:

1. Select it from the list.
2. Click **Delete** button.
3. Confirm deleting on the **Confirm** dialog box:



See Also: Personal Settings

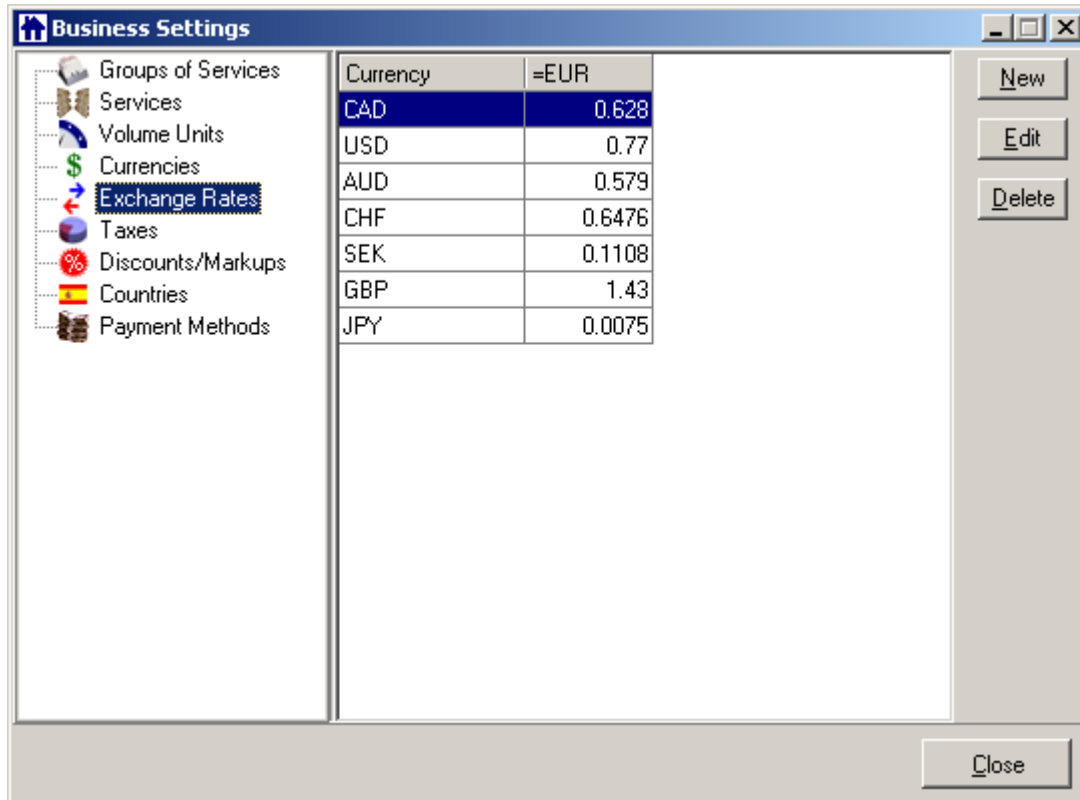
See Also: Advanced Settings

4.1.5 Exchange Rates

Translation Office 3000 V8 provides you with possibility to assign different **Client Currency** to each **Client** and still, be able to see 'the whole picture' using your **Base Currency**. (**Base Currency** is set on the General page of the Advanced Settings window)

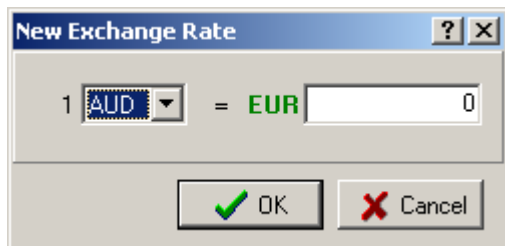
On the **Exchange Rates** page of the **Business Settings** window you can specify the exchange rates between your **Base Currency** and other currencies used (on the screenshot below **Base Currency** is EUR).

To open **Exchange Rates** page click **Exchange Rates** in the left part of the Business Settings window.




To create a new exchange rate record:

1. Click **New** button. **New Exchange Rate** window will open.



2. Select the currency from the drop-down list and specify the rate itself.

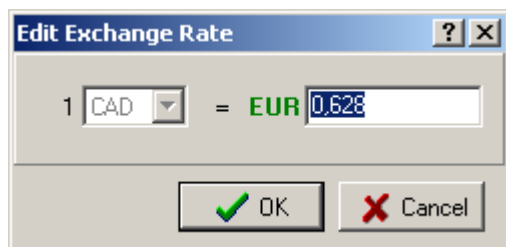
 **Note:** the currencies list consists of currencies added on the Currencies page of the **Business Settings** of **Translation Office 3000 V8 Workstation**.

3. Click **OK** to save changes or click **Cancel** to quit without saving.

To edit existing exchange rate record:

1. Select the necessary record from the list.
2. Click **Edit** button.

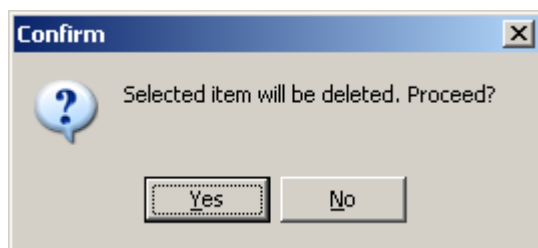
3. Change the rate as needed in the **Edit Exchange Rate** window.



4. Click **OK** to save changes or click **Cancel** to quit without saving.

To delete the existing exchange rate record:

1. Select it from the list.
2. Click **Delete** button.
3. Confirm deleting on the **Confirm** dialog box:



See Also: Personal Settings

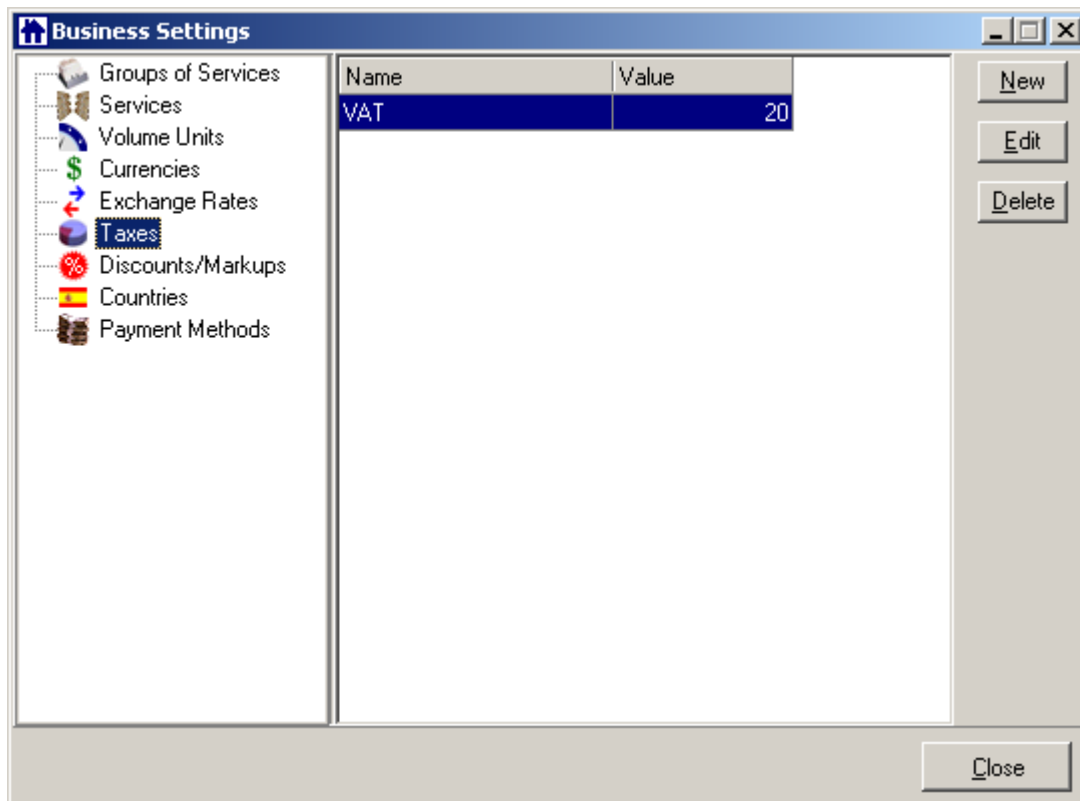
See Also: Advanced Settings

4.1.6 Taxes

Translation Office 3000 V8 provides you with possibility to automatically consider taxes when issuing invoices.

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

To open **Taxes** page click **Taxes** in the left part of the Business Settings window.



To add a new tax record:

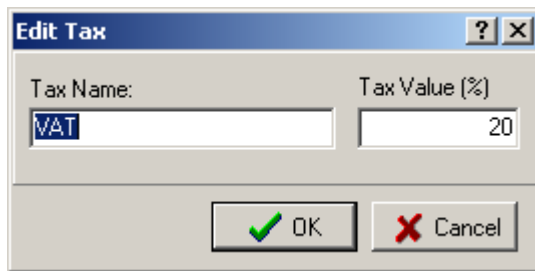
1. Click **New** button. **New Tax** window will open.

2. Enter tax name and value (rate) in the appropriate fields. Please note, that tax rate should be entered in percentage (but without the "%" sign).

3. Click **OK** to save changes or click **Cancel** to quit without saving.

To edit the existing tax record:

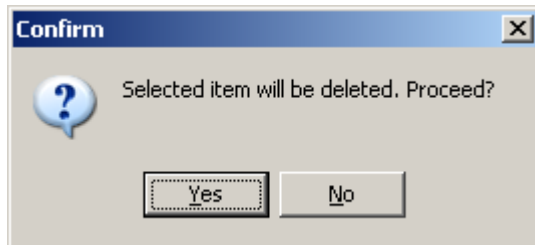
1. Select the necessary record from the list.
2. Click **Edit** button.
3. Change the rate as needed in the **Edit Tax** window.



4. Click **OK** to save changes or click **Cancel** to quit without saving.

To delete the existing tax record:

1. Select the necessary record from the list.
2. Click **Delete** button.
3. Confirm deleting on the **Confirm** dialog box:



See Also: Personal Settings

See Also: Advanced Settings

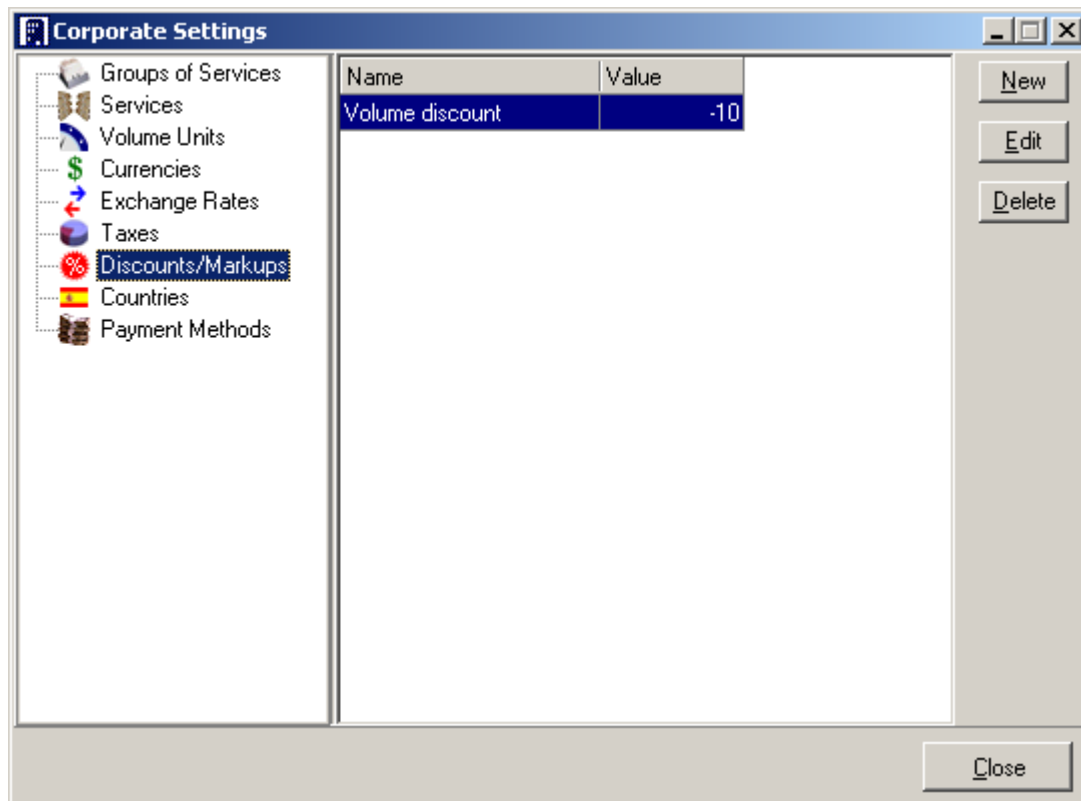
See Also: Client window > Invoices page

4.1.7 Discounts/Markups

[Translation Office 3000 V8](#) provides you with possibility to add and automatically consider discounts and markups when issuing invoices.

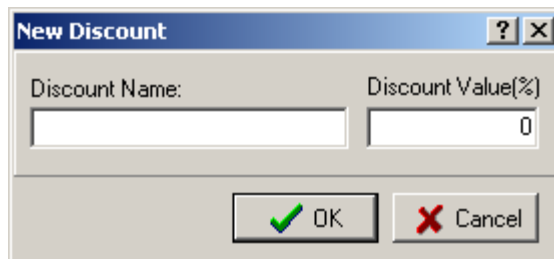
You can specify discounts/markups names and rates on the **Discounts/Markups** page of the **Business Settings** window.


To open **Discounts/Markups** page click **Discounts/Markups** in the left part of the Business Settings window.



To add a new discount/markup record:

1. Click **New** button. **New Discount** window will open.

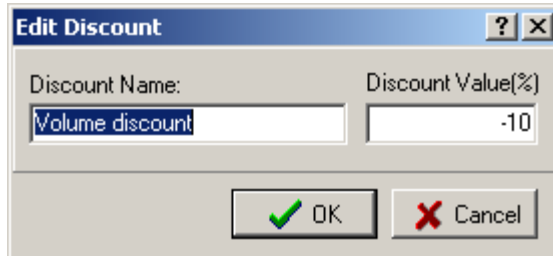


 **Note:** **Discount** rate (value) should be negative; **Markups** are entered/edited in the **New Discount/Edit Discount** window as well and are actually **Discounts**, but they should have positive value.

2. Enter **Discount/Markup** name and value (rate) in the appropriate fields. Please note that rate should be entered in percentage (but without the "%" sign).
3. Click **OK** to save changes or click **Cancel** to quit without saving.

To edit the existing discount/markup record:

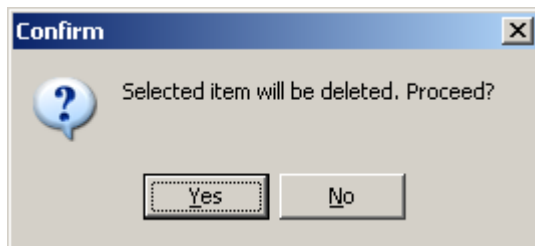
1. Select the necessary record from the list.
2. Click **Edit** button.
3. Change the rate as needed in the **Edit Discount** window.



4. Click **OK** to save changes or click **Cancel** to quit without saving.

To delete the existing discount/markup record:

1. Select it from the list.
2. Click **Delete** button.
3. Confirm deleting on the **Confirm** dialog box:



See Also: Personal Settings


See Also: Advanced Settings

See Also: Client window > Invoices page

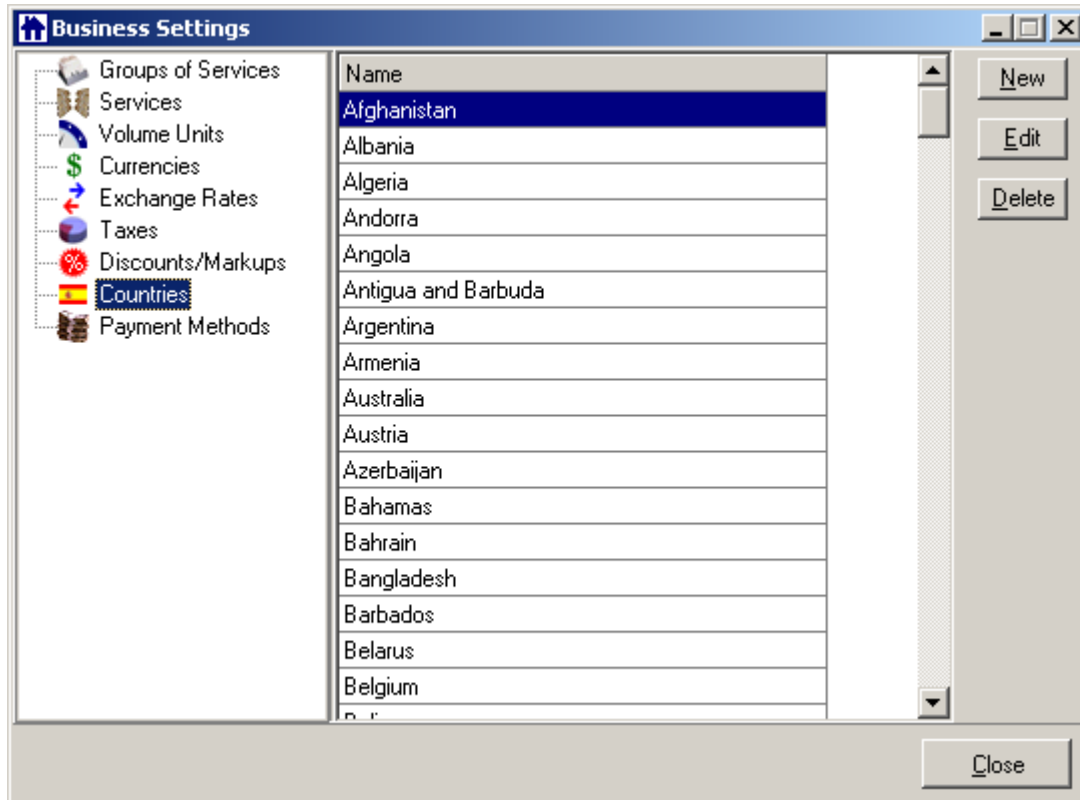
4.1.8 Countries

When creating a new **Client** record in **Translation Office 3000 V8** you can enter postal address and specify the country selecting it from the drop-down list.

On the **Countries** page of the **Business Settings** window you can manage the list of countries mentioned above.

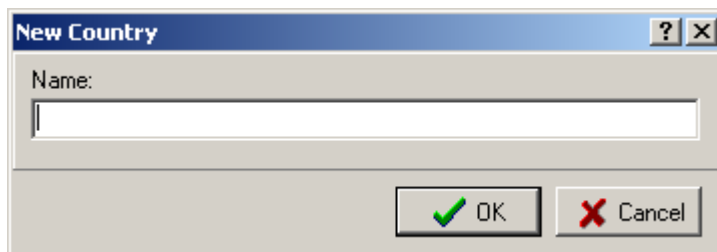
 **Note:** By default **Translation Office 3000 V8** database already contains almost exhaustive list of countries.

To open **Countries** page click **Countries** in the left part of the Business Settings window



To add a new Country:

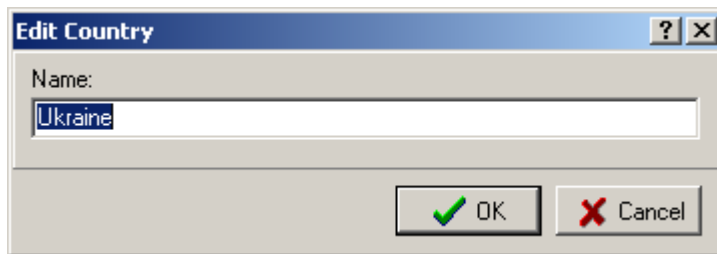
1. Click **New** button. **New Country** window will open.



2. Enter **Country** name in the field provided.
3. Click **OK** to save changes or click **Cancel** to quit without saving.

To edit the existing Country:

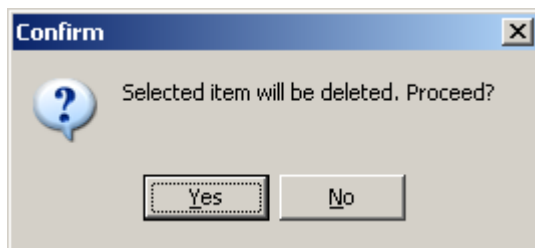
1. Select the necessary record from the list.
2. Click **Edit** button.
3. Make the necessary changes in the **Edit Country** window.



4. Click **OK** to save changes or click **Cancel** to quit without saving.

To delete the existing Country:

1. Select it from the list.
2. Click **Delete** button.
3. Confirm deleting in the **Confirm** dialog box:



See Also: Personal Settings

See Also: Advanced Settings

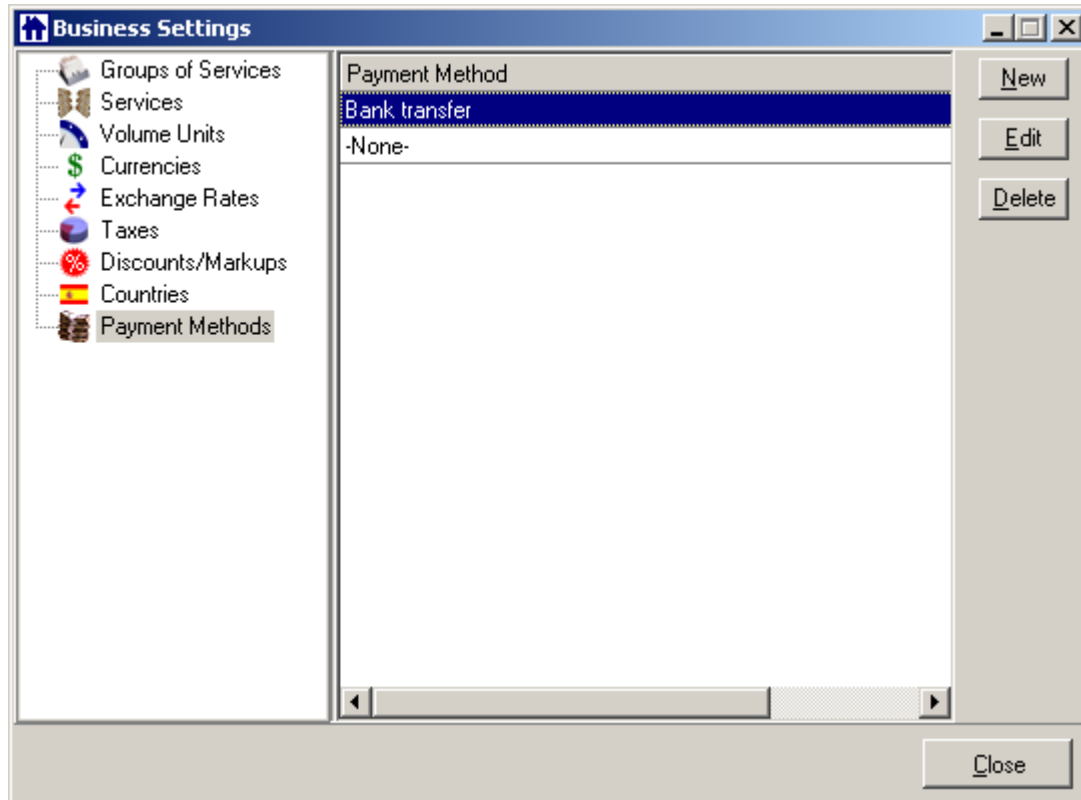
See Also: Client window > Main page (adding new Client)

4.1.9 Payment Methods

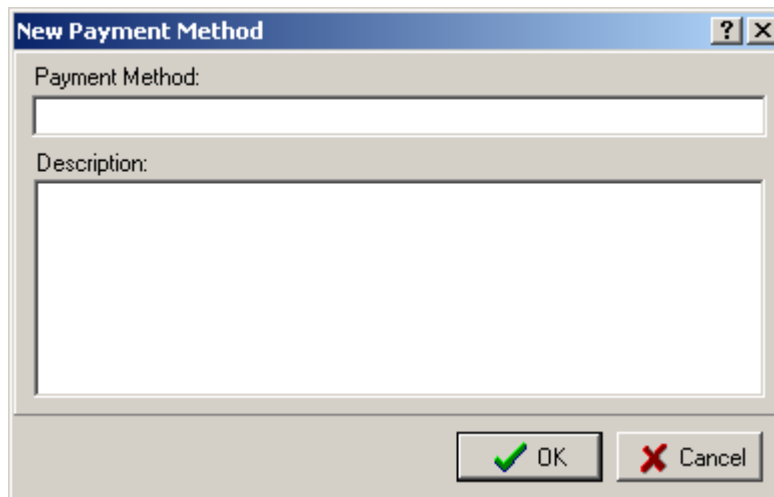
Payment Method is one of the many parameters that can be added to the invoice when it is issued with **Translation Office 3000 V8**. Under "Payment Method" we mean the details for performing the payment (bank details, for example).

You can create/edit/delete **Payment Method** records on the **Payment Methods** page of the **Business Settings** window.

To open **Payment Methods** page click **Payment Methods** in the left part of the Business Settings window

**To add a new Payment Method:**

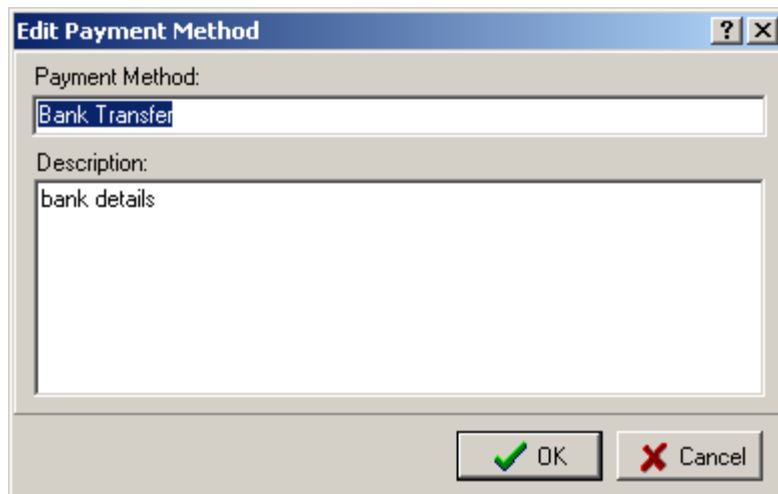
1. Click **New** button. **New Payment Method** window will open.



2. Enter **Payment Method** name and description in the corresponding fields.
3. Click **OK** to save changes or click **Cancel** to quit without saving.

To edit the existing Payment Method:

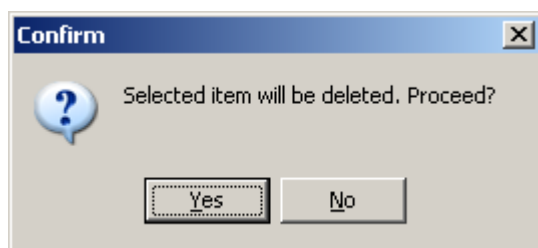
1. Select the necessary record from the list.
2. Click **Edit** button.
3. Edit **Payment Method** name and/or description in the **Edit Payment Method** window.



4. Click **OK** to save changes or click **Cancel** to quit without saving.

To delete the existing Payment Method:

1. Select it from the list.
2. Click **Delete** button.
3. Confirm deleting in the **Confirm** dialog box:



See Also: Client window > Invoices page

See Also: Personal Settings

See Also: Advanced Settings

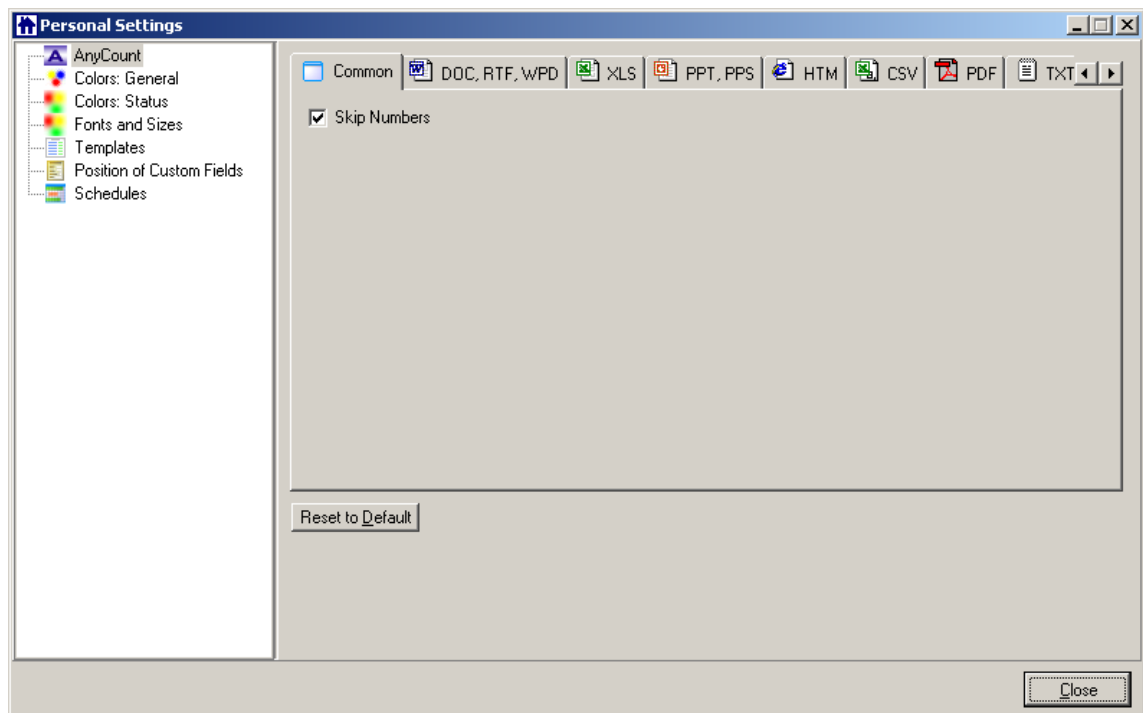
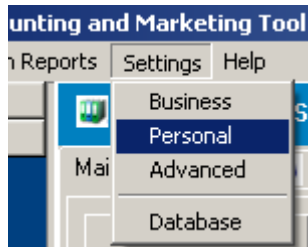
4.2 Personal Settings

Wide possibilities for customization are among [Translation Office 3000 V8](#) greatest benefits.

[Translation Office 3000 V8](#) settings are divided into three logical groups: Business, **Personal** and Advanced settings.

Personal settings refer to the interface customization mostly.

To open the [TO3000 Personal Settings](#) window click menu **Settings** > **Personal** command:



For details on each page of the [Personal Settings](#) see:

- **AnyCount**
- **Colors: General**
- **Colors: Status**
- **Fonts and Sizes**
- **Templates**

- Custom Fields
- Schedules

To close **Personal Settings** window click **Close** button in bottom right part of the window.

See Also: Business Settings

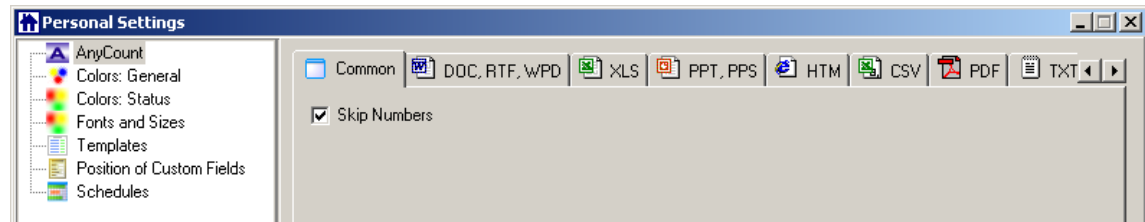
See Also: Advanced Settings

4.2.1 AnyCount

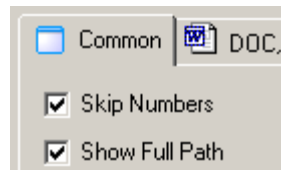
Translation Office 3000 V8 users can enjoy the built-in **AnyCount 5.0** - word, character and custom volume units count tool. It counts single or multiple files of all commonly used file formats: .RTF, .DOC, .WPD, .XLS, .PPT, .PPS, .PDF, .CSV, .HTM, .HTML, .XML, .TXT, .ZIP.

You can specify **AnyCount** settings (general and specific for different files formats) on the **AnyCount** page of the **Personal Settings** window.

AnyCount page opens automatically when Personal Settings window opens.



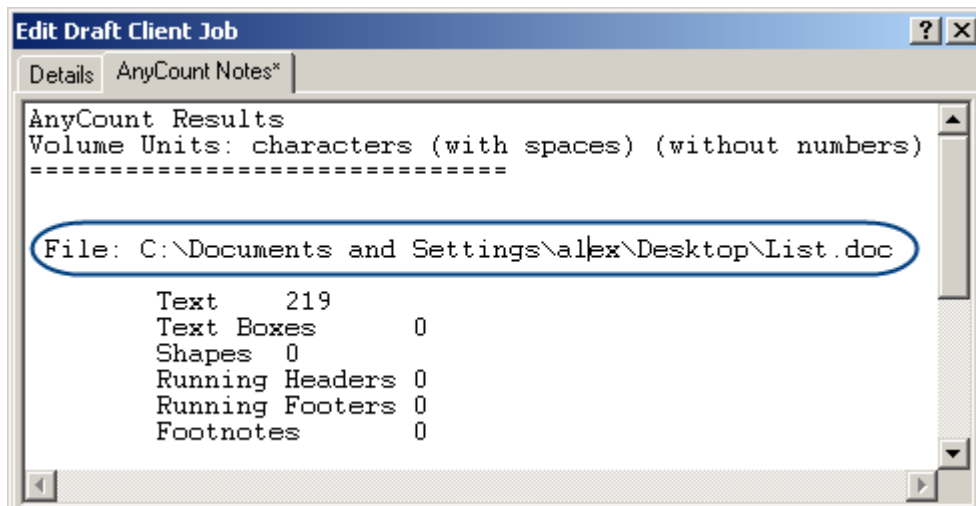
Common



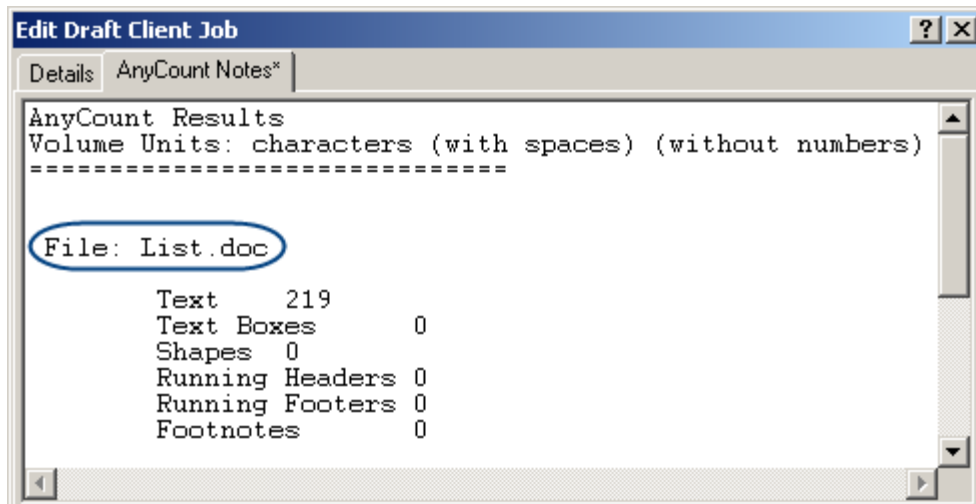
When **Skip Numbers** check box is selected, **AnyCount** produces count omitting numbers in the documents.

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

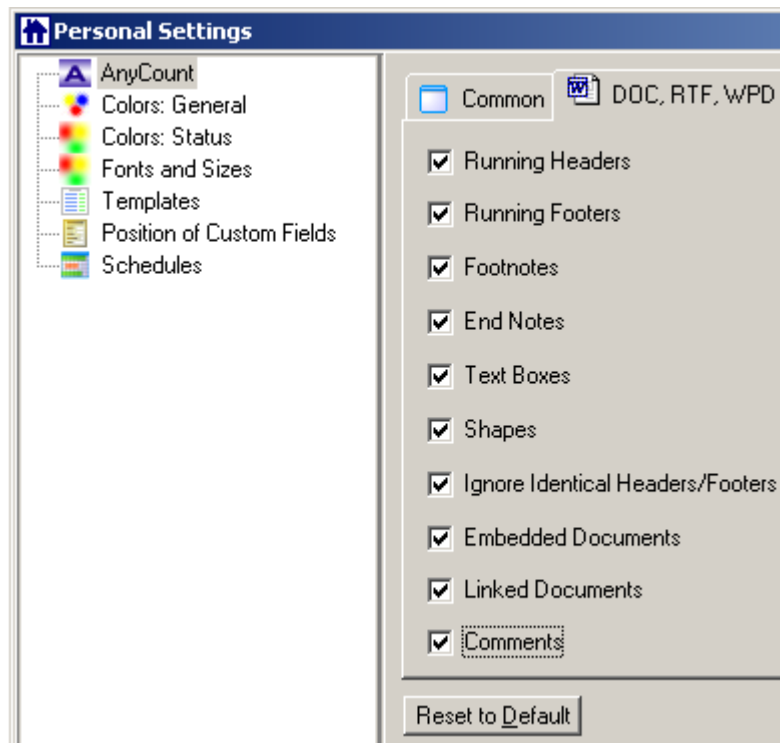
Show Full Path is selected:



Show Full Path is cleared:




.DOC, .RTF, .WPD



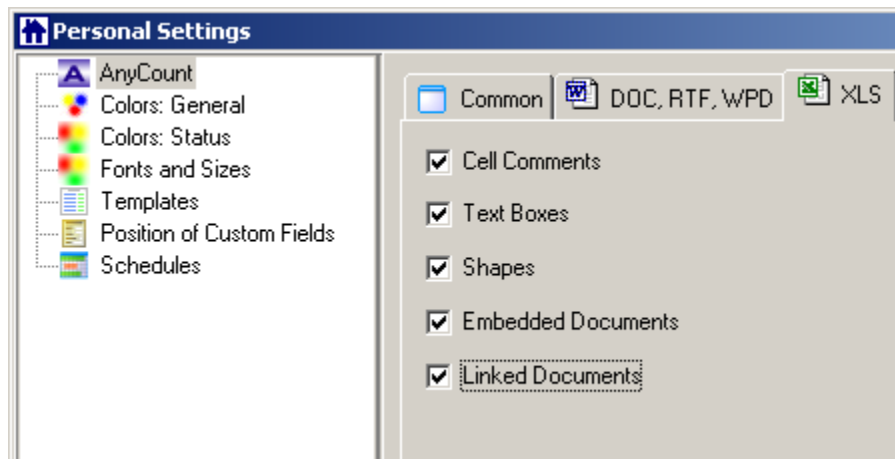
[AnyCount](#) comes with important additional options for counting .DOC, .RTF and .WPD files. Select the corresponding options to enable:

- Counts in Running Headers;
- Counts in Running Footers;
- Counts in Footnotes;
- Counts in End Notes;
- Counts in Text Boxes;
- Counts in Shapes;
- Counts in Embedded Documents;
- Counts in Linked Documents;
- Counts in Comments;

[AnyCount](#) is able to optionally ignore texts in identical Headers/Footers.

 **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.

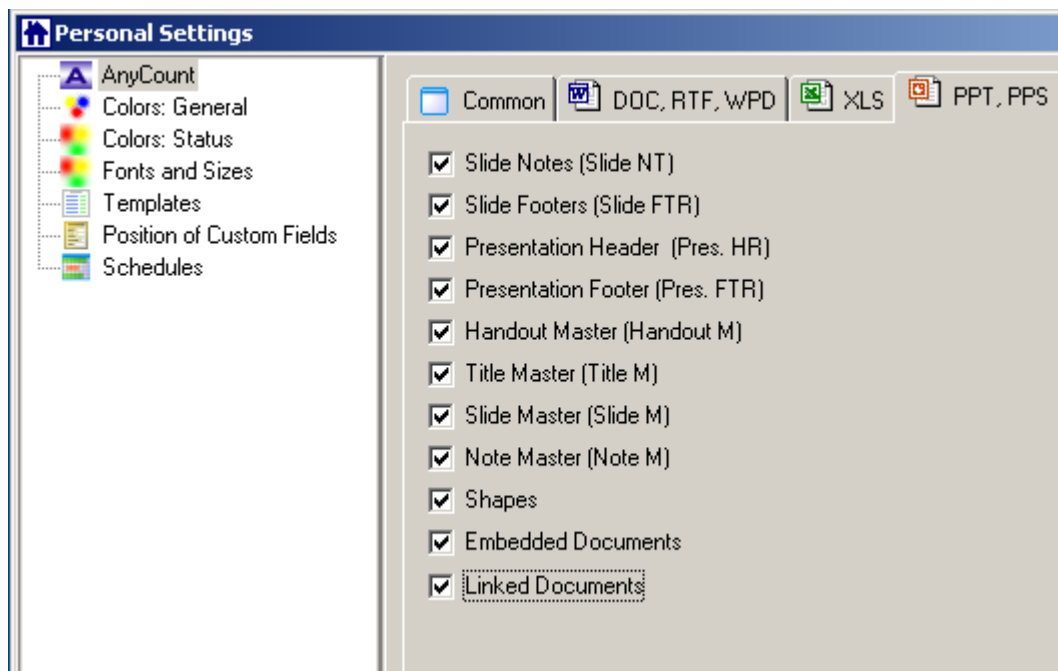
.XLS



When counting MS Excel files AnyCount is able to optionally include separate count for:

- Cell Comments;
- Text Boxes;
- Shapes;
- Embedded Documents;
- Linked Documents.

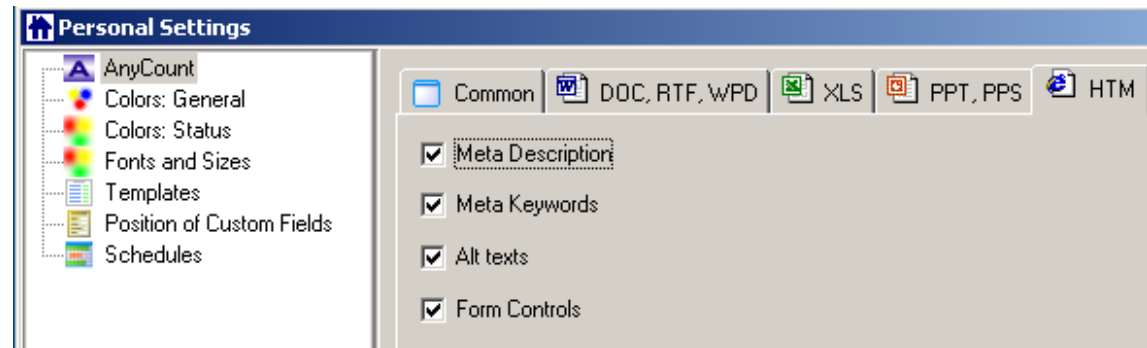
.PPT, .PPS



[AnyCount](#) is able to optionally include important additional count statistics for [PowerPoint](#) files:

- Slide Notes;
- Slide Footers;
- Presentation Header;
- Presentation Footer;
- Handout Master;
- Title Master;
- Slide Master;
- Note Master;
- Shapes;
- Embedded Documents;
- Linked Documents.

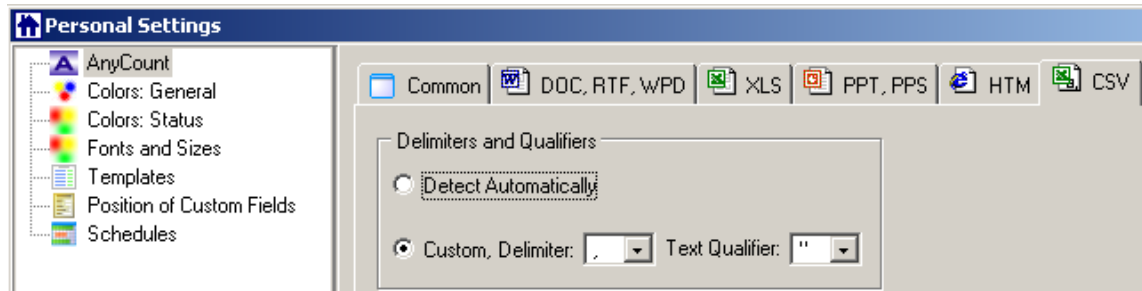
.HTM



[AnyCount](#) is able to optionally include important additional count statistics for [.HTM/.HTML](#) files:

- Meta Description;
- Meta Keywords;
- Alt Texts;
- Form Controls.

.CSV



AnyCount can automatically recognize text delimiters.

But you can also set custom delimiters and text qualifiers in cases of non-standard files.

Available delimiters:

, - comma, ; - semicolon

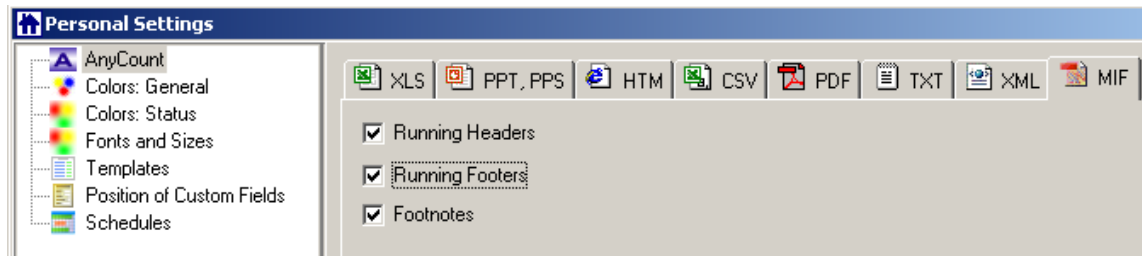
Available text qualifiers:

' - apostrophe, " - quotation marks.

.PDF, .TXT, .XML


.PDF, .TXT and .XML formats does not require any special settings.

.MIF



When counting .MIF files **AnyCount** can optionally include additional counts for:

- Word, page, line and character counts in Running headers
- Word, page, line and character counts in Running footers
- Word, page, line and character counts in Footnotes

 **Note:** Some options may be disabled in the evaluation version.

See Also: [Creating Client Jobs](#)

See Also: [Business Settings](#)

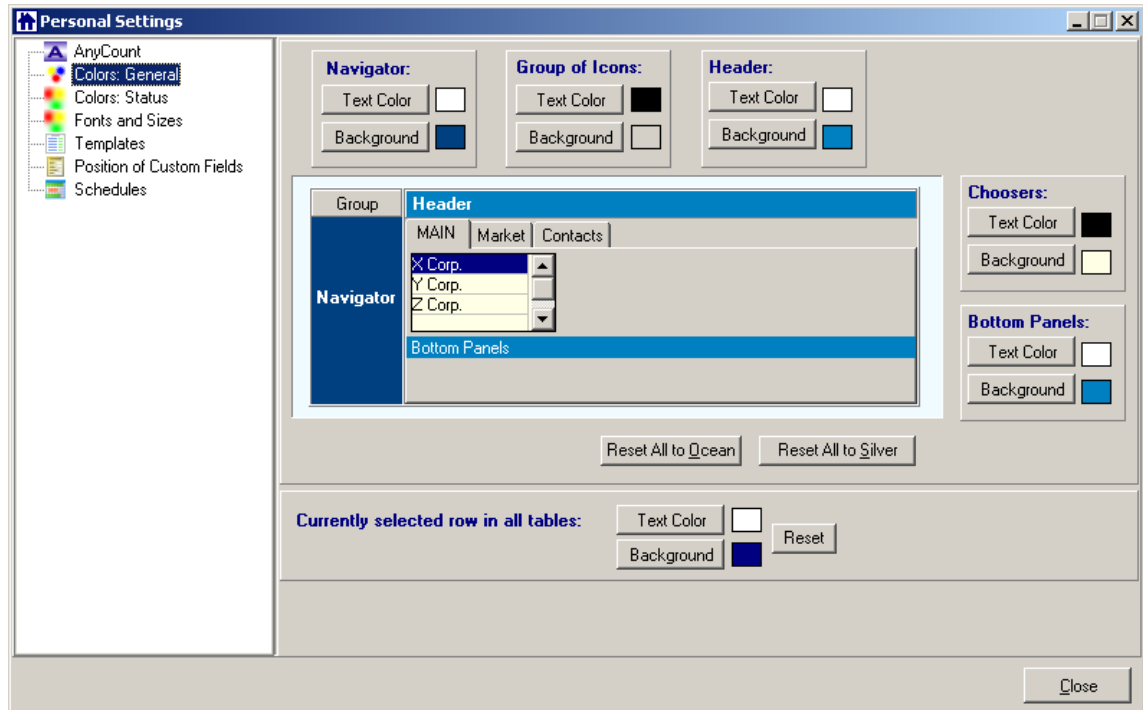
4.2.2 Colors: General

Customize your [Translation Office 3000 V8!](#)



It is easy to change colors of different interface details. Paint it with any color of the rainbow on the **Colors: General** page of the **Personal Settings!**

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



Use corresponding buttons to change the color of text and background for different parts of Translation Office 3000 V8 interface.

See Also: Colors: Status

See Also: Business Settings

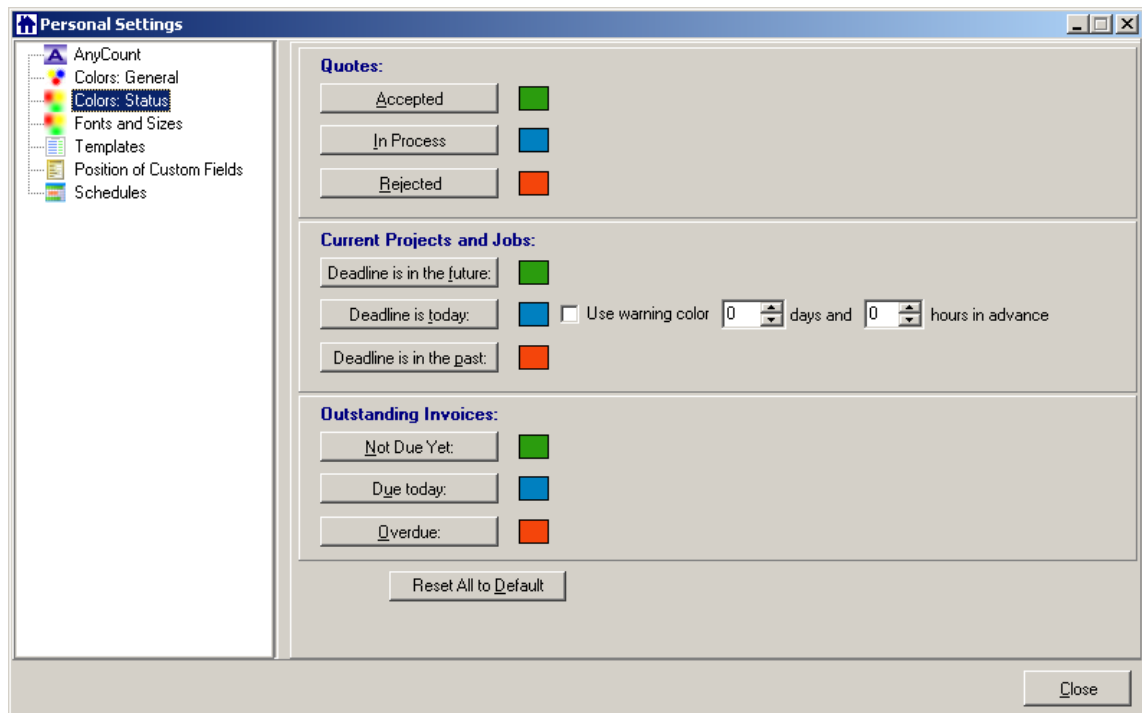
4.2.3 Colors: Status

To make jobs/projects/financial tracking more effective Translation Office 3000 V8 provides the possibility of color differentiation for quotes/projects/jobs/invoices with different status.

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

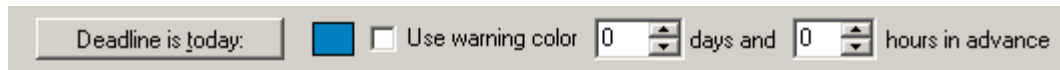
You can change colors to mark off items status on the Colors: Status page of the **Personal Settings**.

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



Use the corresponding buttons to open color panel and set the color for each status of **Quotes**, **Current Projects and Jobs**, **Outstanding Invoices**.

A color highlight warning for **Projects** and **Jobs** is even more customizable: you can specify how much in advance warning statuses are assigned:



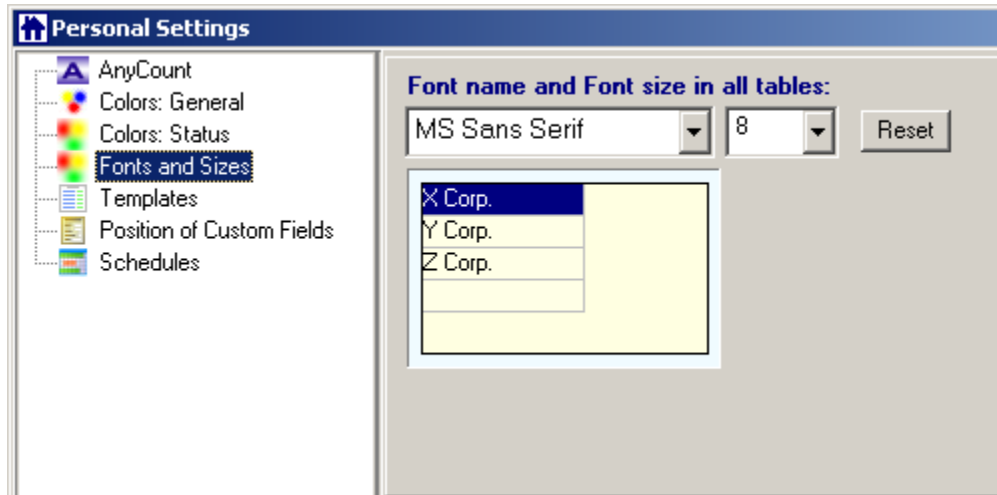
See Also: Colors: General

See Also: Business Settings

4.2.4 Fonts and Sizes

On the **Fonts and Sizes** page of the **Personal Settings** you can set font and size of the text in Translation Office 3000 V8 tables.

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



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

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

See Also: Business Settings

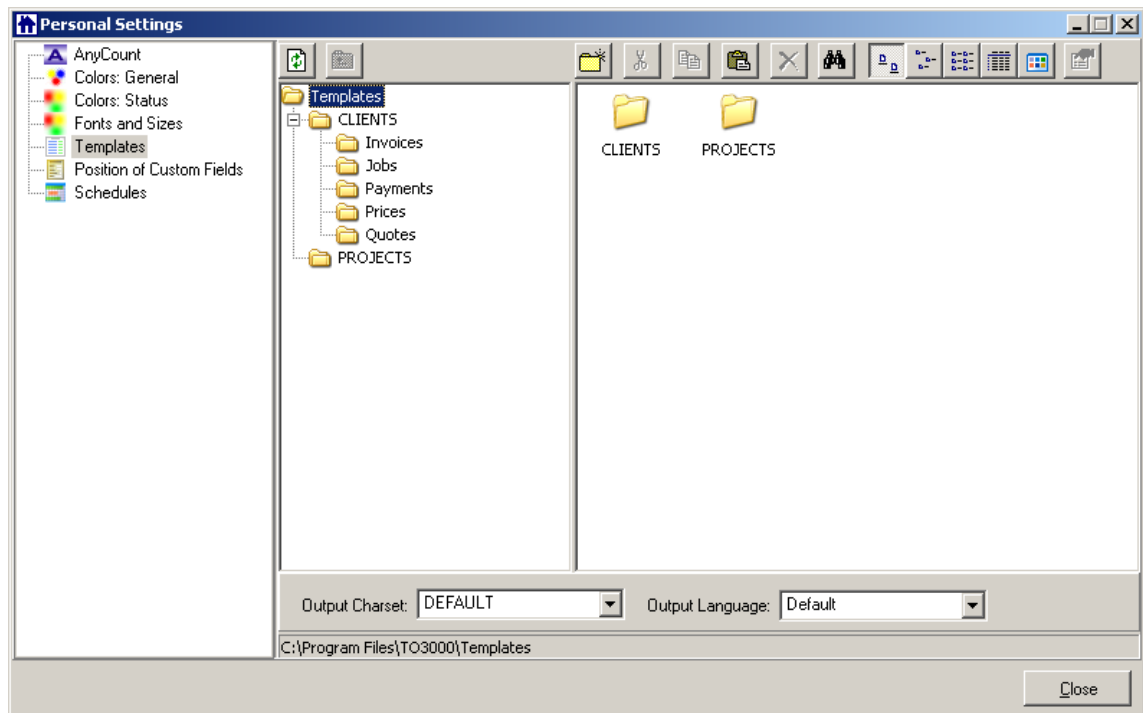
4.2.5 Templates

All documents issued in [Translation Office 3000 V8](#) can be saved and/or printed as RTF documents.

All templates are stored in subfolders of [Templates](#) folder (by default: [C:\Program Files\Translation Office 3000 V8\Templates](#)).

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

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



By default **Templates** folder contains two subfolders: **CLIENTS** and **PROJECTS**. **CLIENTS** contains more subfolders (see the screenshot above) with correspondent RTF templates.

Use little square buttons with icons for managing the subfolders.



Starting from the very left:

- create new folder (in the **Templates** folder);
- cut the folder;
- copy the folder;
- paste the folder;
- delete the folder;
- open Search window;
- Icons view;
- Titles view;
- List view;
- Details view;

- Thumbnails view;
 - use it to open the Properties window for the selected folder.
-

See Also: Business Settings

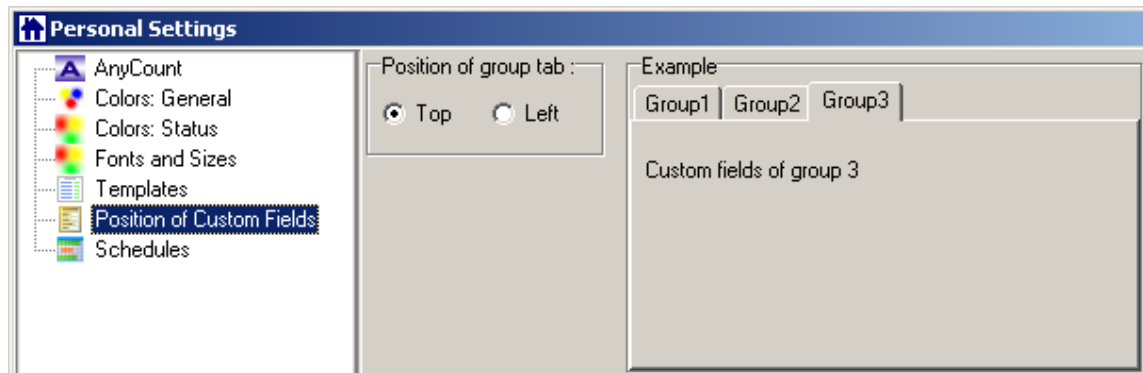
4.2.6 Position of Custom Fields

To fit your individual needs and add different kinds of additional information you can create custom fields of various types: [Number](#), [CheckBox](#), [String](#), [Text](#), [Date](#), [Time](#), [Date and Time](#), for each part – [Clients](#), [Projects](#) and [Business Expenses](#). Custom fields can be grouped by custom groups.

Custom fields can be added on Custom Fields page of Advanced Settings window.

On the [Position of Custom Fields](#) page of the [Personal Settings](#) you can design the view of custom groups (custom fields are grouped by) you create.

To open [Position of Custom Fields](#) page click menu [Settings](#) > [Personal](#) and click [Position of Custom Fields](#) in the left part of the window.



Check [Top](#) option to place custom groups' tabs on the top of the page. In this case you custom fields page will look like this, for example ([Common](#) and [Availability](#) are custom groups names):

Corporate Expert: Timo Turunen

Main | Corporate Jobs | JAs | Files | Info | Schedule

New Corporate Expert | Delete

Starts with []

Name
Allyson Laven
Alvaro Wigren
Bryon Ortolano
Javier Kuster
Jennie Schofield
Latoya Pittman
Ronald Holton
Shelia Watts
Sheryl Hirsch

Expert Profile | Custom

Common | Availability

Joined Team: []

Computer Proficiency: Advanced

Or check **Left** option to place custom groups' tabs on the left of the page. In this case you custom fields page will look like this:

Corporate Expert: Timo Turunen

Main | Corporate Jobs | JAs | Files | Info | Schedule

New Corporate Expert | Delete

Starts with []

Name
Allyson Laven
Alvaro Wigren
Bryon Ortolano
Javier Kuster
Jennie Schofield
Latoya Pittman
Ronald Holton
Shelia Watts
Sheryl Hirsch

Expert Profile | Custom

Common | Availability

Joined Team: []

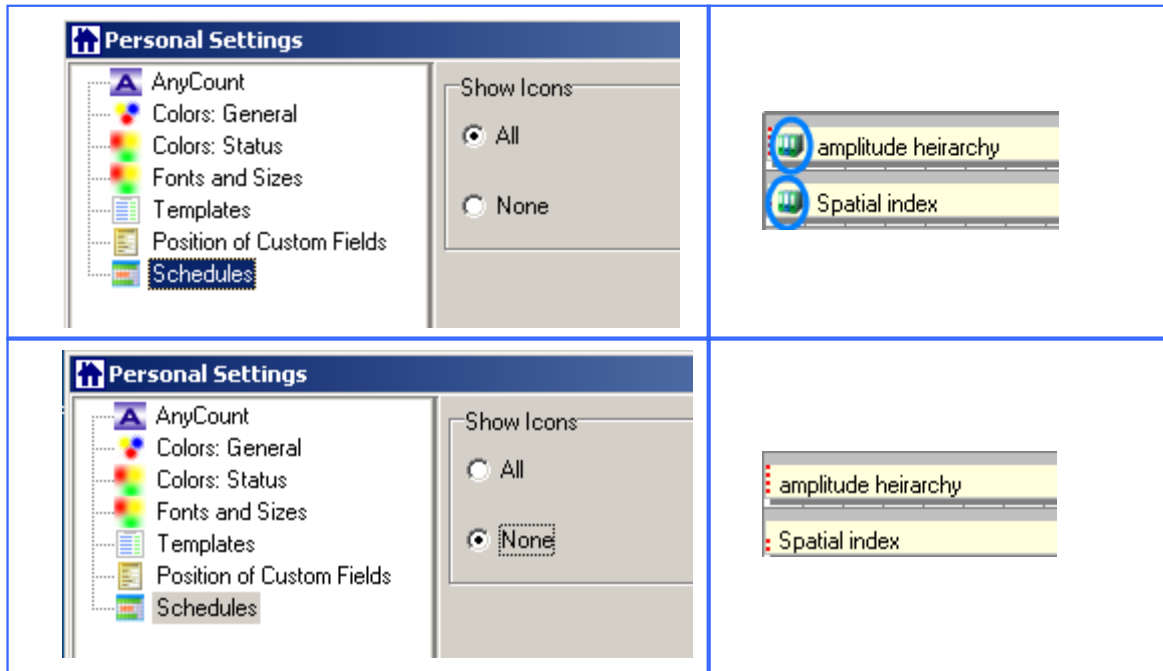
Computer Proficiency: Advanced

Learn more about Custom Fields (creating/editing/deleting).

4.2.7 Schedules

After a major upgrade Translation Office 3000 V8 is powered with a new extra handy tool - visual **Schedules** for **Clients** and **Projects: Client Jobs** and **Projects** are displayed in a graphical way allowing to see all pending, due/overdue projects and/or jobs at a glance.

On the **Schedules** page of the **Personal Settings** window you select whether you want to display the icon on the columns representing the **Projects/Jobs** in the **Schedules** of TO3000:



See Also:

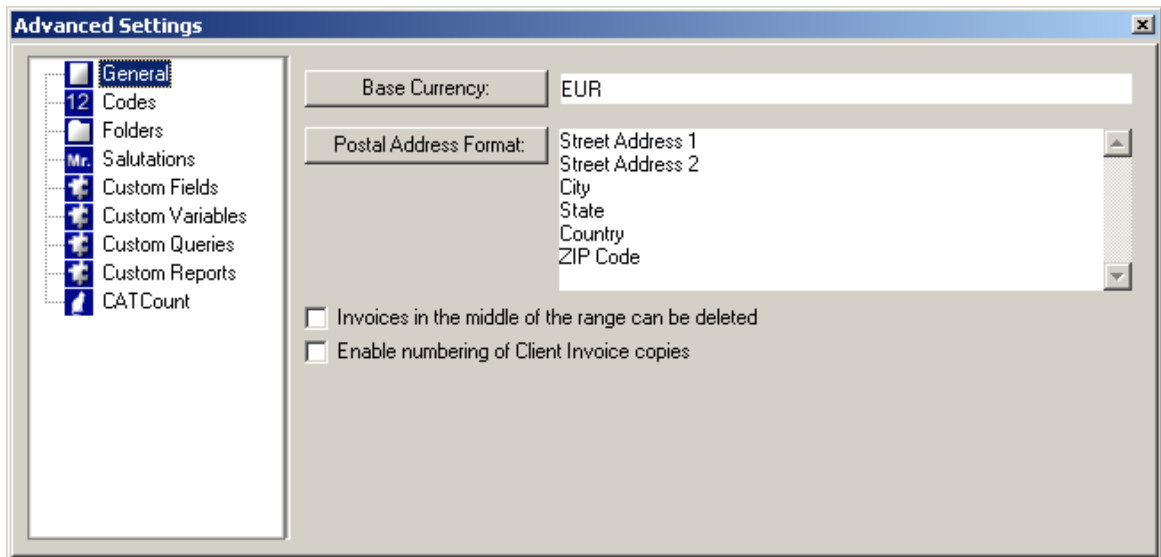
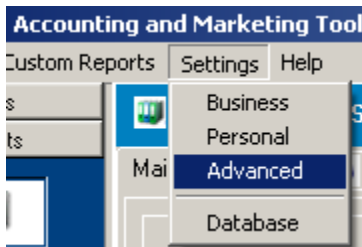
Schedules: tracking the Jobs/Projects accomplishment


4.3 Advanced Settings

Translation Office 3000 V8 provides wide possibilities for customization, making your work with the application easy and pleasant.

You can customize the most advanced features of Translation Office 3000 V8 on the **Advanced Settings** window.

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



 **Note:** Changing **Advanced** settings requires TO3000 to run in a special mode. That is why all other parts of the interface become out of view when the **Advanced Settings** window is open.

Advanced Settings pages:

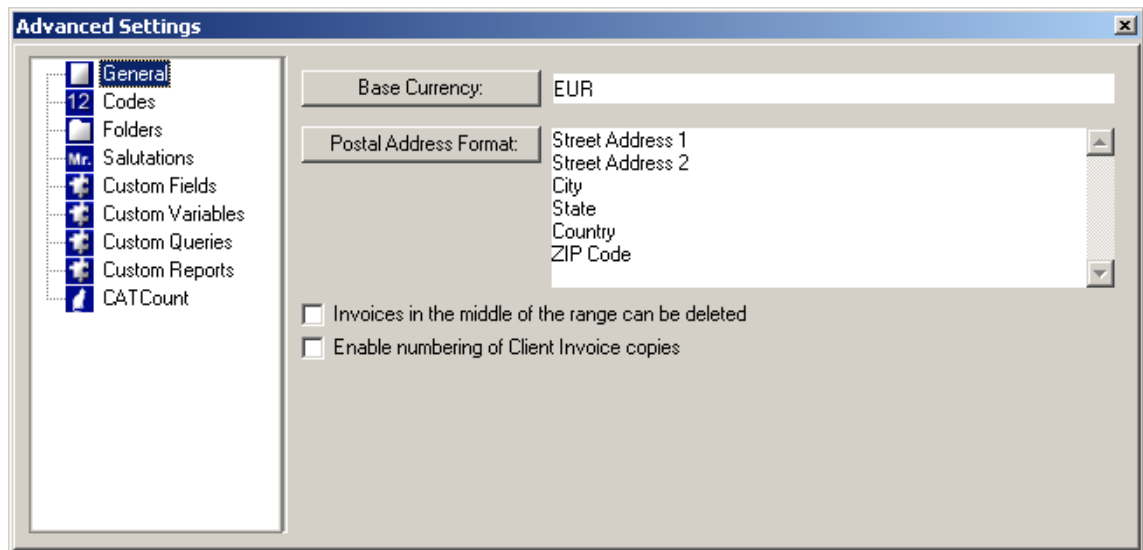
- **General.** Selecting or changing **Base Currency** for accounting and **Postal Address Format**.
- **Codes.** Viewing and editing of global codes (**Projects, Invoices, POs**) and mode of naming of .RTF files.
- **Folders.** Settings for folder automation.
- **Salutation.** Default contact salutations, which are available for contacts.
- **Custom Fields.** Creation and modification of custom database fields for **Clients, Projects,** and **Business Expenses**.
- **Custom Variables.** Custom global template variables, used for generation of .RTF files.

- **Custom Queries.** Create custom queries to retrieve necessary data out of the database.
- **Custom Reports.** Create custom reports to fit your reporting needs and requirements.
- **CATCount.** Enabling and disabling CATCount feature and selecting CATCount units.

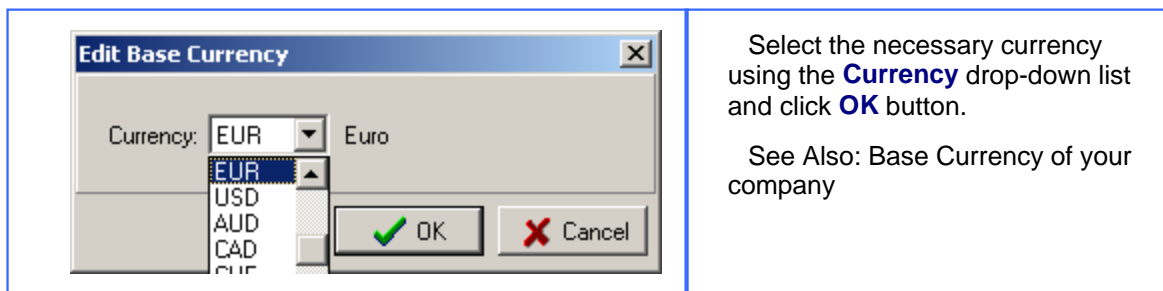
4.3.1 General

On the **General** page of the **Translation Office 3000 V8 Advanced Settings** window you can set **Base Currency** and customize **Postal Address** view.

General page opens automatically when you open **Advanced Settings** window.



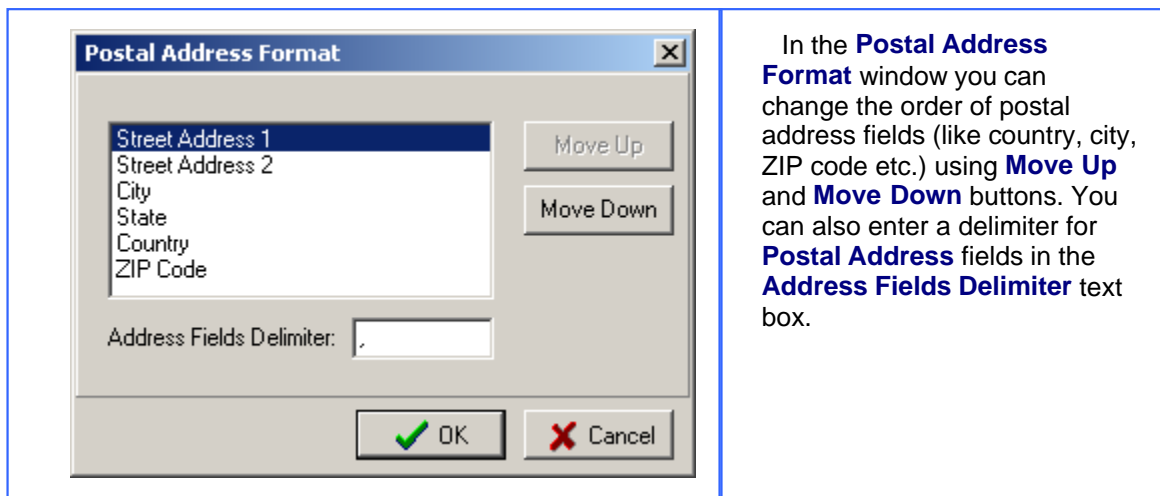
To set/change **Base Currency**, click the **Base Currency:** button. **Edit Base Currency** dialog box appears (you will need to confirm the editing, if any financial records in **Base Currency** already exist):



Select the necessary currency using the **Currency** drop-down list and click **OK** button.

See Also: Base Currency of your company

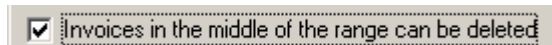
To customize view of the **Postal Address** (the way it will be displayed in **Invoices** and other documents) click **Postal Address Format:** button. **Postal Address Format** window opens.



The options of the **General** page relate to the **Invoices** settings of TO3000:

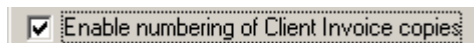
By default only last **Invoice** (i.e. **Invoice** with the last number in the database) can be deleted. Other **Invoices** (i.e. **Invoices** with numbers in the middle of the range of numbers) can be only voided.

To change this setting and allow deleting any **Invoices** select the **Invoices in the middle of the range can be deleted** option:



See Also: Deleting Invoices. Voided Invoices.

To enable creating of several copies and numbering them when creating a new **Invoice** select **Enable numbering of Client Invoice copies** option:



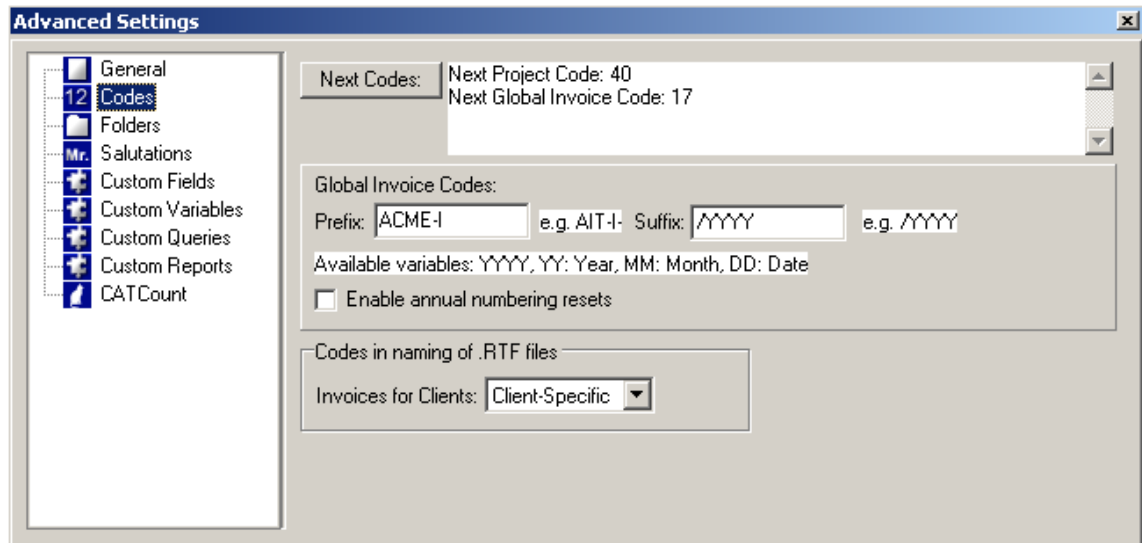
See Also: Advanced Settings

4.3.2 Codes

Codes are used to identify documents. They can contain different information and have different view.

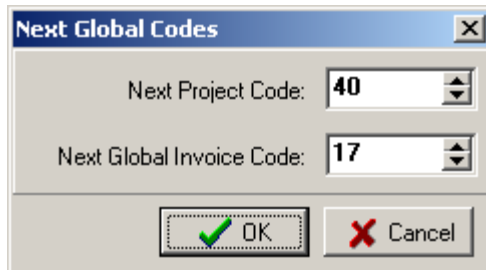
You can customize **Global Codes** on the **Codes** page of the Advanced Settings window.

To open **Codes** page click **Codes** in the left part of the Advanced Settings window.

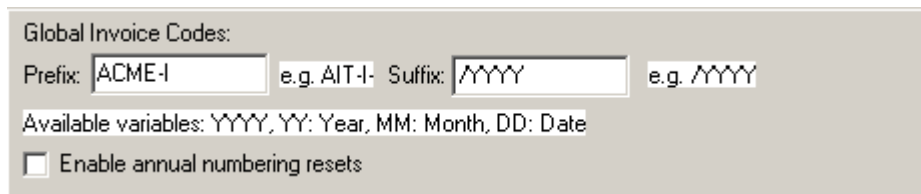


Click **Next Codes:** button to open the **Next Global Codes** window and set the **Global Code** which will be assigned to the:

- next **Project**;
- next **Invoice** issued to clients;

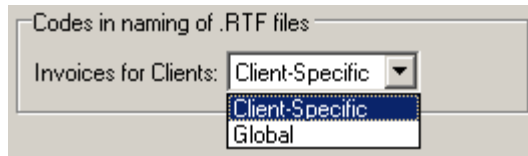


Also you can customize the prefix and suffix of **Global Invoice Codes** and enable annual numbering resets:



 **Note:** After **Enable annual numbering resets** is selected, these resets cannot be disabled back!

.RTF files options determine what code will be used when automatically generating file names for **Invoices** (it can be **Client-Specific** or **Global**).



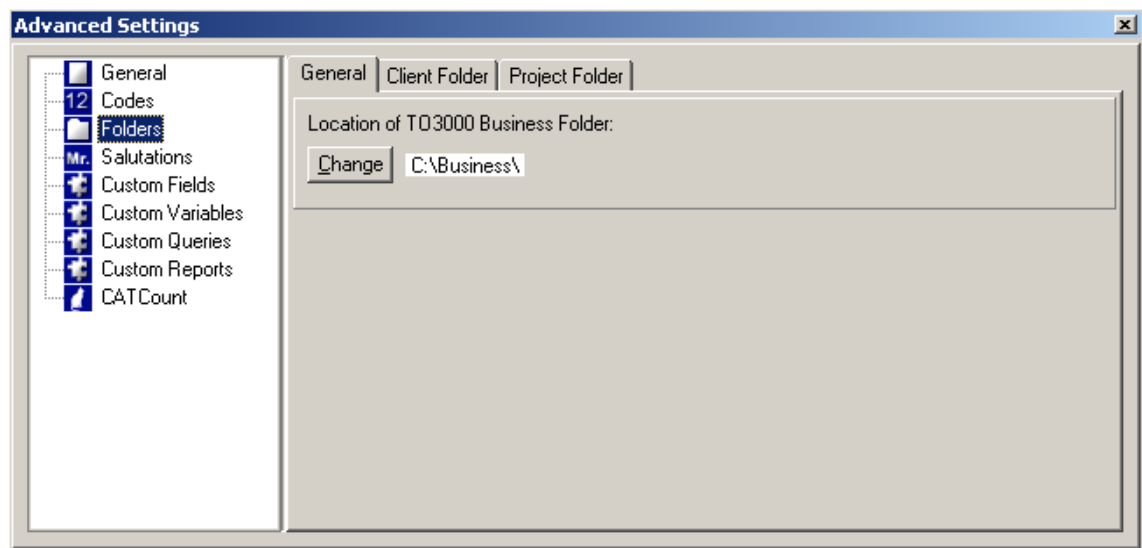
See Also: [Advanced Settings](#)

4.3.3 Folders

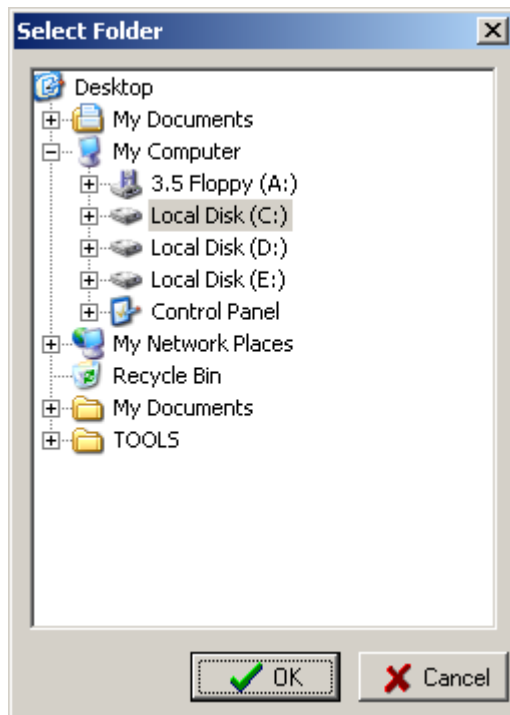
[Translation Office 3000 V8](#) automatic folder creation, thought-out structuring and simple access release your brain space for more important or pleasant things.

You can customize the automation and structure of [Translation Office 3000 V8](#) folders on the **Folders** page of the **Advanced Settings** window.

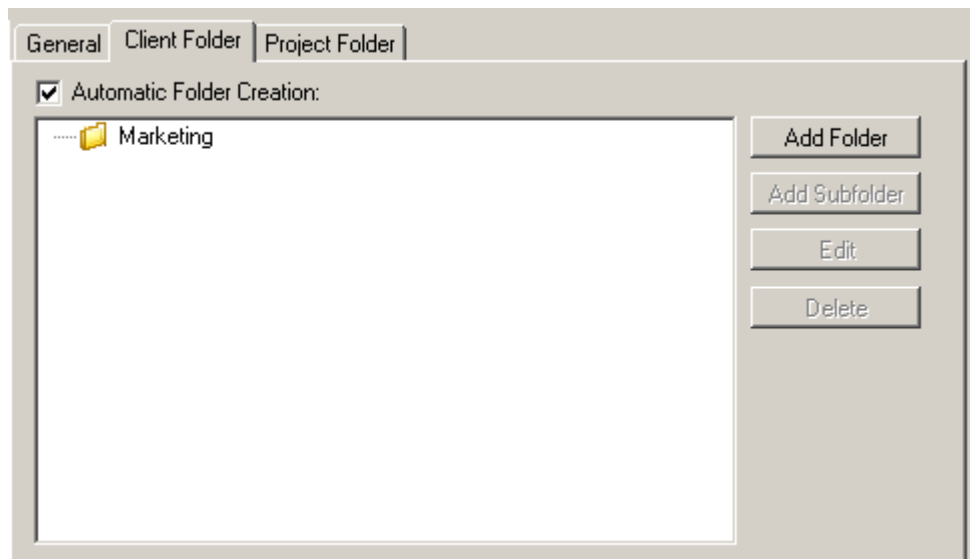
To open **Folders** page click **Folders** in the left part of the Advanced Settings window.

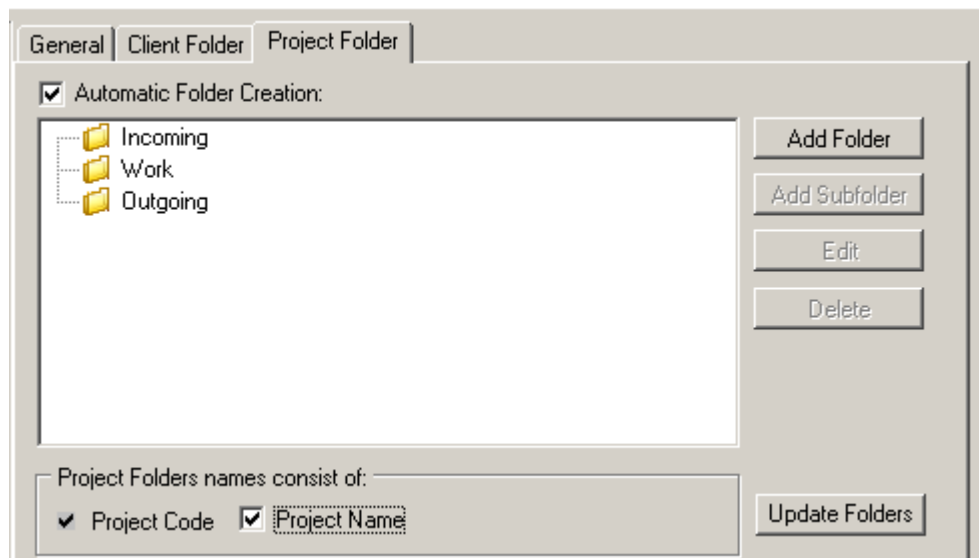


On the **General** tab of the **Folders** page you can change the location of the **Business** folder (main parent folder created by [Translation Office 3000 V8](#), all other folders are stored there). By default it is located on drive C. To change the default location click **Change** button and select new location:



On other tabs of the **Folders** page you can create/delete subfolders for the **Client** and **Project** folders, enable their automatic creation and set folders' names structure.



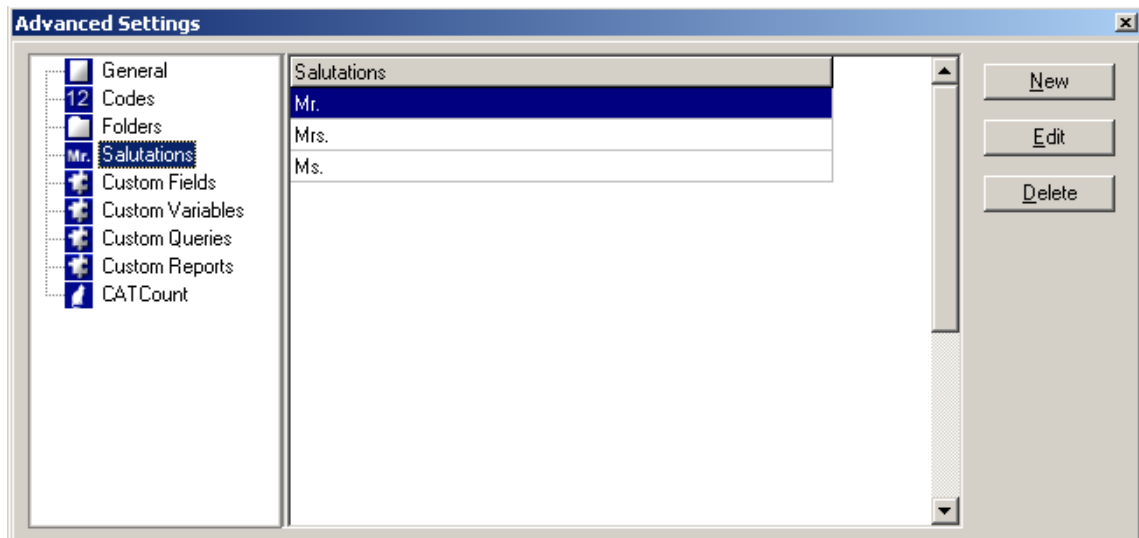


See Also: Advanced Settings

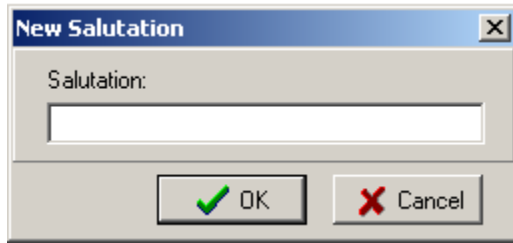
4.3.4 Salutations

On the **Salutations** page of the Advanced Settings window you can create new or edit existing salutations if needed.

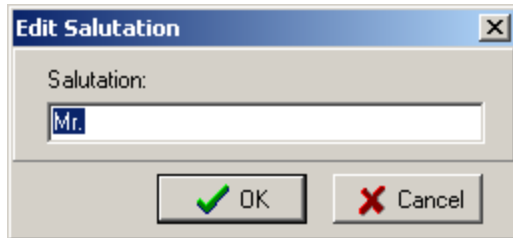
To open **Salutations** page click **Salutations** in the left part of the Advanced Settings window.



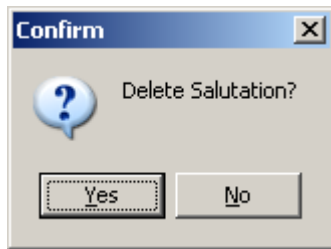
To add a new salutation: click **New** button and enter the text of the salutation in the **New Salutation** dialog box:



To edit the existing Salutation: select it from the list and double-click it or click **Edit** button. Make the necessary changes in the **Edit Salutation** dialog box:



To delete the existing Salutation: select it from the list, click **Delete** button and confirm the deletion:



See Also: Advanced Settings

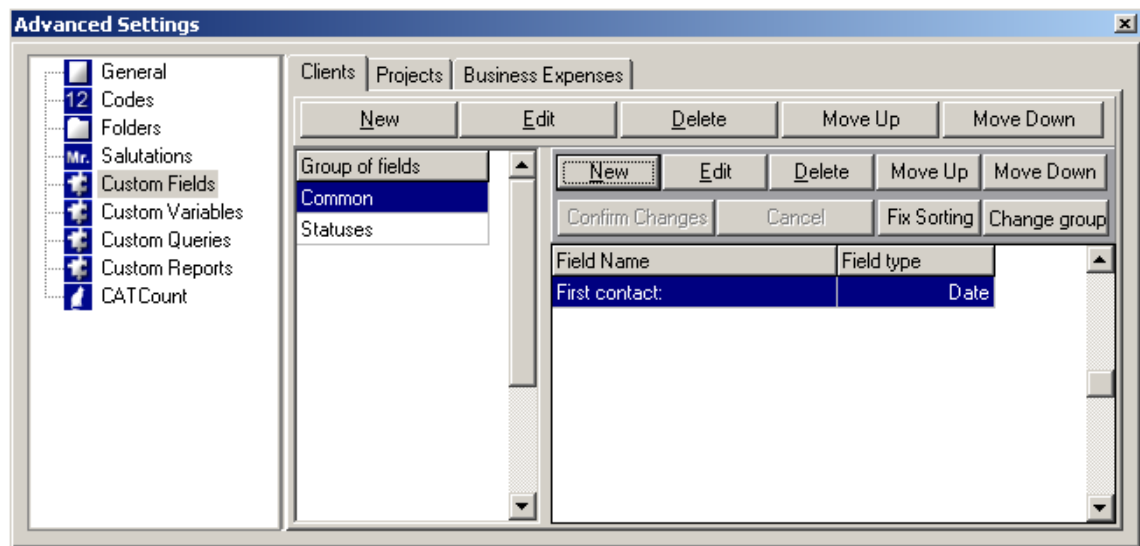
4.3.5 Custom Fields

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 group – **Clients**, **Projects**, **Corporate Experts**, **Freelancers**, and **Corporate Expenses**.

Custom fields can be added on **Custom Fields** page 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!

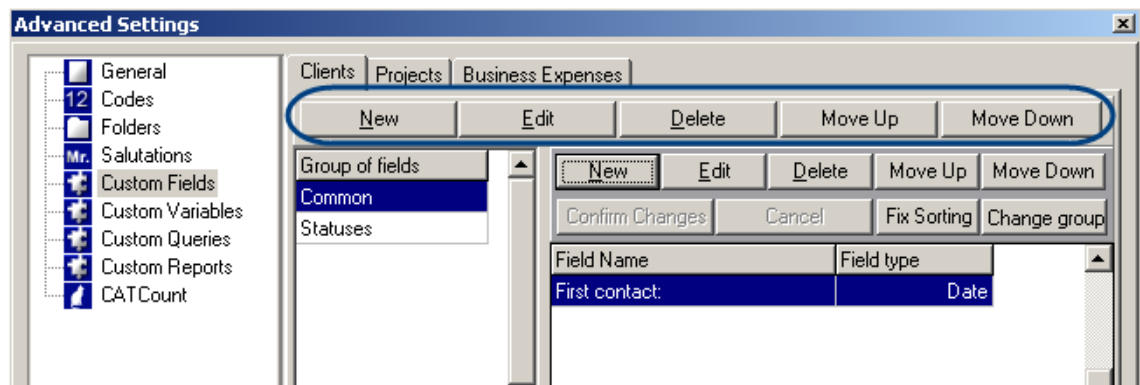
To open **Custom Fields** page click **Custom Fields** in the left part of the Advanced Settings window.



When creating a new field, you will need to specify the **Group of fields** the newly created field belongs to. So if you want it to be other, than default **Common** group, please create custom **Group of fields** first.

To add a new Group of fields:

1. Select the necessary tab: **Clients**, **Projects** or **Business Expenses**.
2. Click **New** button from the upper row of buttons.





3. Specify **Group of fields** in the **New Custom Group of fields** window.



4. Click **OK** to save changes or click **Cancel** to discard.

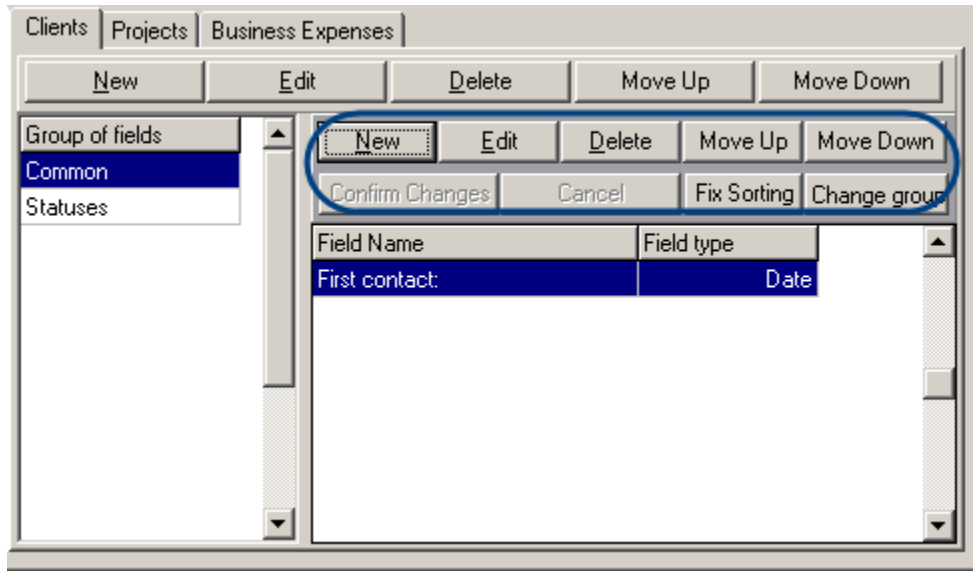
To **edit/delete Group of fields** select it from the list and click **Edit** or **Delete** button correspondingly from the upper button row.

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

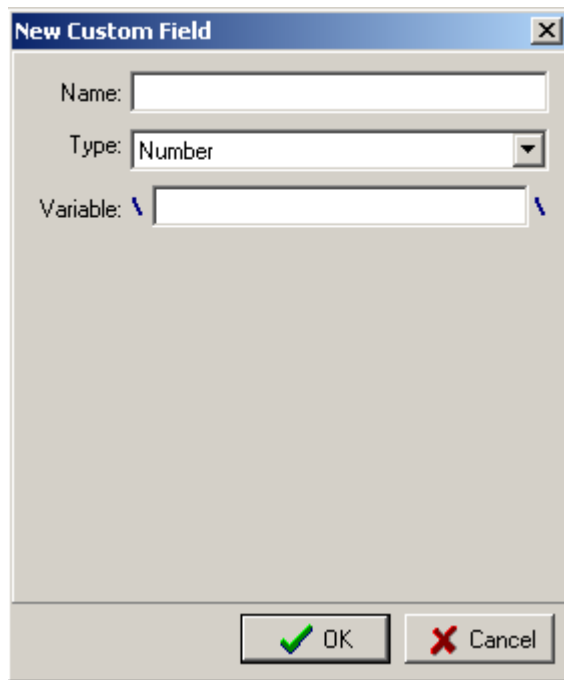
To change the order of the **Group of fields**, i.e the order of tabs with the **Custom Fields**, use  /  buttons from the upper row.

To add a new Custom Field:

1. Select the necessary **Group of fields** (if you have created more than one).
2. Click **New** button from the lower row of buttons:

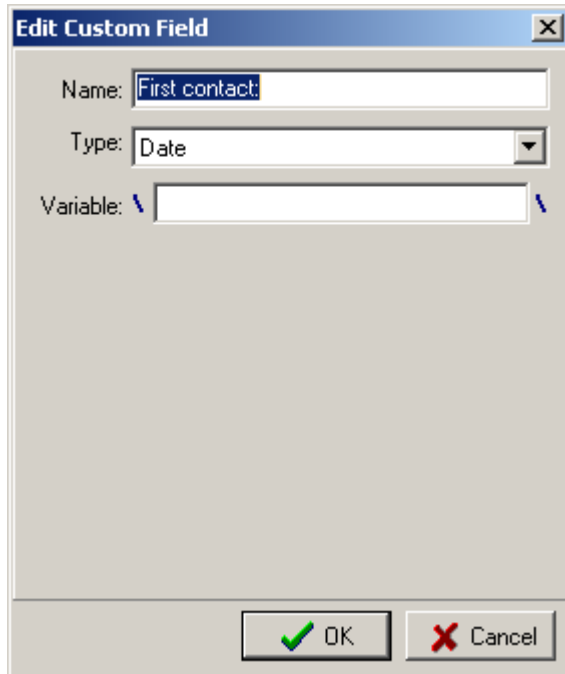


3. Fill the fields of the **New Custom Field** window:



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

Use **Edit** button from the lower row to change the name, type or variable name of the selected **Custom Field**. You can enter the changes in the **Edit Custom Field** window, that will appear on the button click. It is absolutely similar to the **New Custom Field** window described above.
Example:



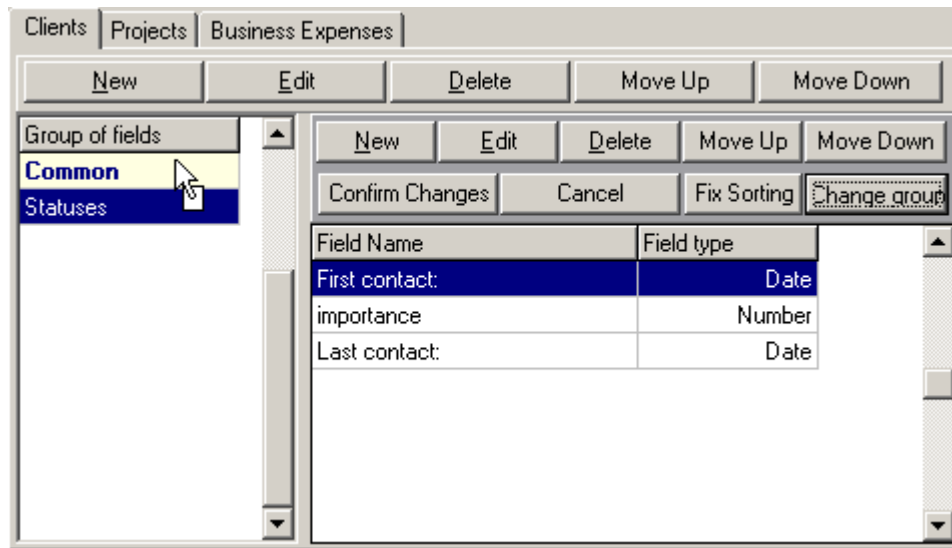
The screenshot shows a dialog box titled "Edit Custom Field". It has a standard Windows-style title bar with a close button (X). The dialog contains three input fields: "Name" with the text "First contact", "Type" with a dropdown menu showing "Date", and "Variable" with a text box containing a backslash character. At the bottom, there are "OK" and "Cancel" buttons.

To delete the **Custom Field** click **Delete** button from the lower row and confirm the deletion.

Use **Move Up** / **Move Down** buttons to move the selected **Custom Field** relative to the other **Custom Fields**.

Use **Fix Sorting** button to fix the current sorting order of the **Custom Fields**.

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



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

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

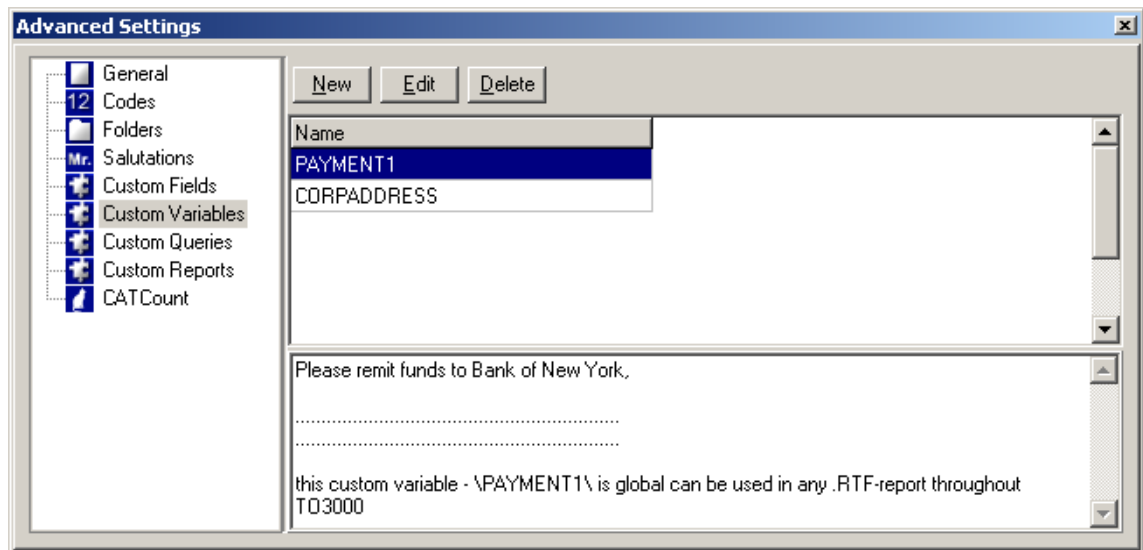
See Also: Business Settings

4.3.6 Custom Variables

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

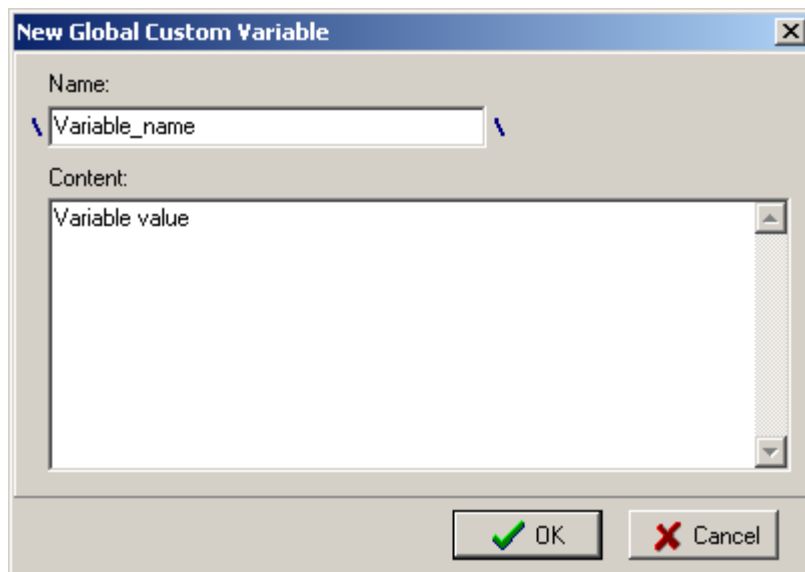
➔ **Example:** If you enter EMAIL as a name of the variable and info@marsonlymars.com as a content, you will be able to use \EMAIL\ variable inside all your .RTF templates. If later your e-mail changes to info@venusforever.com you will not have to change it in all templates but will be able to do this only once from this central point in **Advanced Settings** window.

To open **Custom Variables** page click **Custom Variables** in the left part of the Advanced Settings window.



To add a new Variable:

1. Click **New** button.
2. Enter **Variable** name and value (content) in the corresponding fields of **New Global Custom Variable** window.



3. Click **OK** to save changes or click **Cancel** to discard.

To edit/delete existing variables use **Edit/Delete** buttons of the **Custom Variables** page correspondingly.

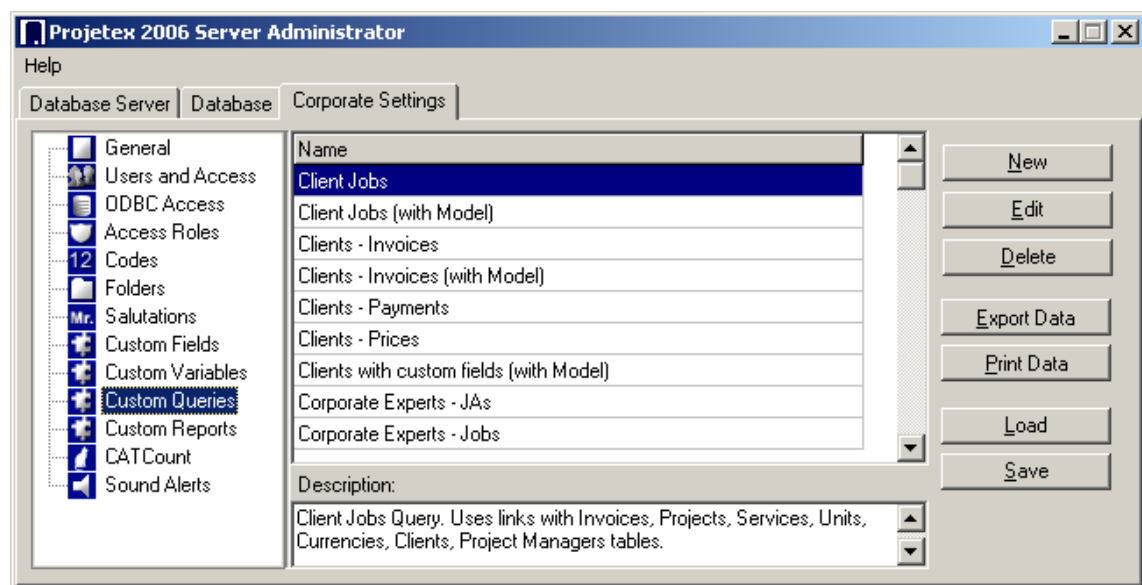
See Also: Business Settings

See Also: Templates

4.3.7 Custom Queries

On the **Custom Queries** page of **Advanced Settings** window you can create your own queries to get data you are interested in.

To open **Custom Queries** page click **Custom Queries** in the left part of the Advanced Settings window.

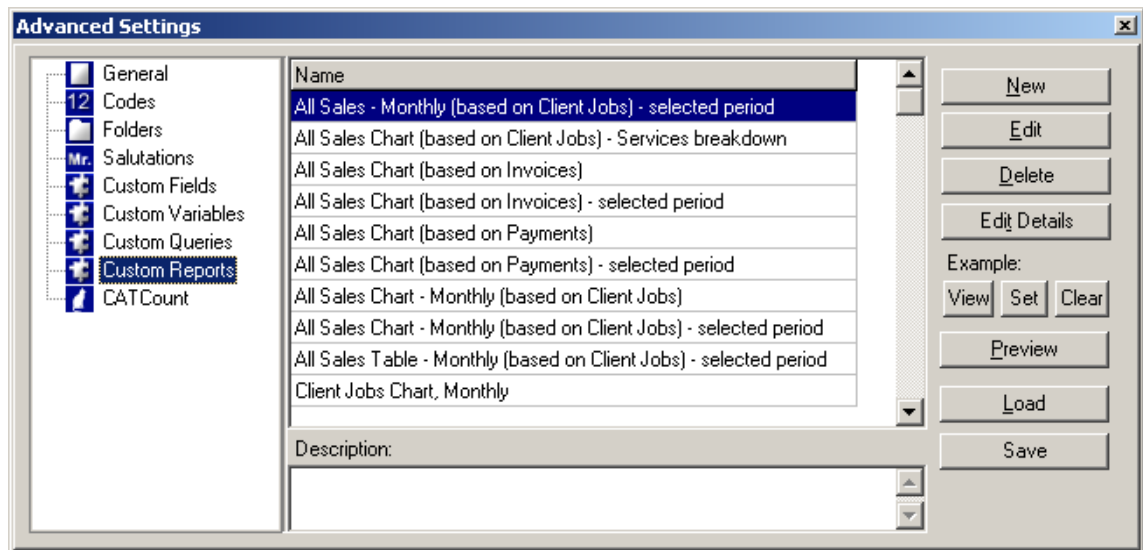


See Also: Advanced Settings

4.3.8 Custom Reports

In **Custom Reports** page of **Business Settings** page you can create your own reports to better fit particular requirements of your business.

To open **Custom Reports** page click **Custom Reports** in the left part of the Advanced Settings window.



See Also: Advanced Settings

4.3.9 CATCount

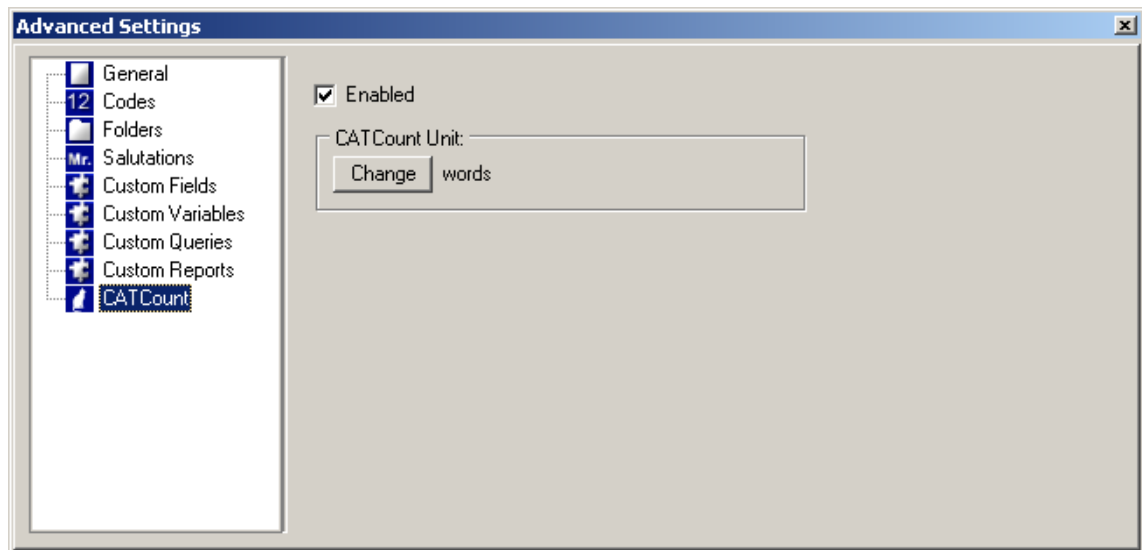
If you or your clients work in translation industry then you definitely need **CATCount**, because it greatly eases the task of accounting of **Computer Assisted Translation** jobs.

CATCount does this by translating complex **CAT Scheme** into one easy number, i.e. **CATCount**. Additionally, it provides great features for printing and export of used **CAT Scheme** together with original word counts, and resulting **CATCount**. Word count analysis logs of **Trados Translator's Workbench** are processed automatically.

Translation Office 3000 V8 provides you with built-in **CATCount** tool.

On the **CATCount** page of the **Advanced Settings** you can enable using **CATCount** and set its units.

To open **CATCount** page click **CATCount** in the left part of the **Advanced Settings** window.



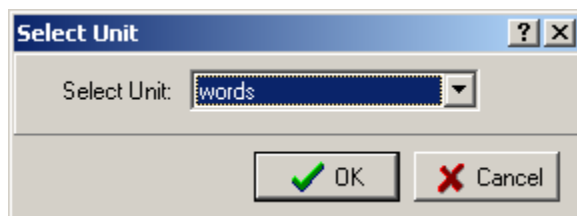
To enable **CATCount** select **Enabled** option.

 **Note:** When this feature is enabled, **CATCount** button appears in **New/Edit Client Job** and **New/Edit Client Quote** dialog boxes of Translation Office 3000 V8:



Clicking **CATCount** button displays **CATCount** dialog box.

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

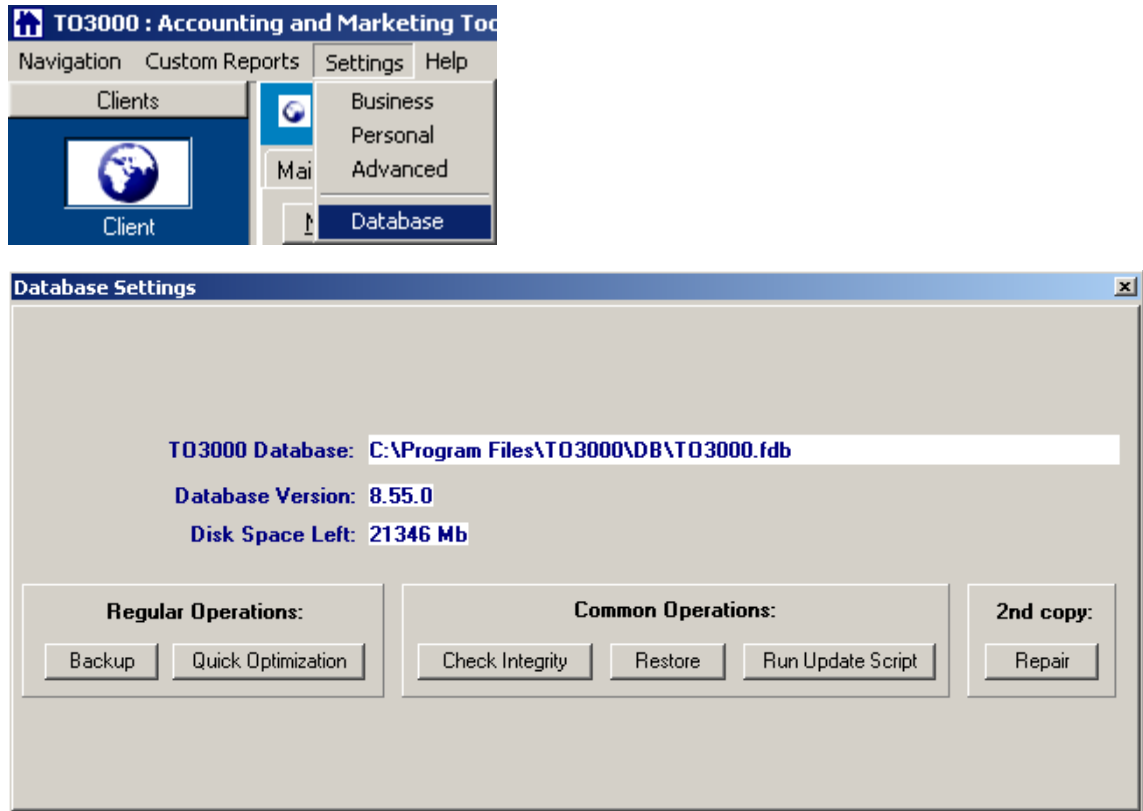



Units displayed in this list can be edited/deleted or added on the Volume Units page of the **Business Settings**.

See Also: Advanced Settings

4.4 Database Settings

Database command from the **Settings** menu provides access to the **Database Settings** window where you can directly manage the TO3000 database, i.e. backup, restore, repair, update etc.



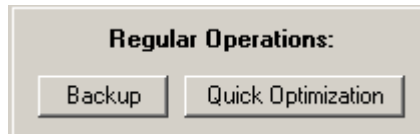
 **Note:** Database managing requires TO3000 to run in a special mode. That is why all other parts of the interface become out of view when the **Database Settings** window is open.

In the upper part of the **Database Settings** window you can find the general information about your TO3000 database:


- **TO3000 Database: C:\Program Files\TO3000\DB\TO3000.fdb** - the location of the TO3000 database on your computer;
- **Database Version: 8.55.0** - the version of your TO3000 database.
- **Disk Space Left: 21346 Mb** - information about the free space left on the disk, where

TO3000 database is located.

Regular Operations



- Click **Backup** button to create the backup file of your TO3000 database.

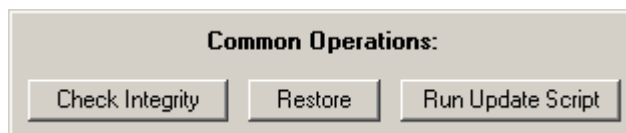
 **Note:** It is highly recommended to backup your database at least once a week and copy the backup file to a safe place, at least different from that where your database is located. This will help you to avoid data loss in case your computer crashes.

After you click **Backup** the **Backup Database** dialog box appears where you can specify the necessary information. More Details...

- Click **Quick Optimization** button to optimize and quicken the work of your TO3000 database (performing the optimization frees up the unused space in database file and improves its performance).

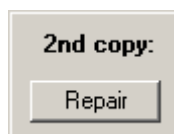
 **Note:** **Quick Optimization** is performed automatically during **Backup** command. If you do backups regularly, there is no need to run **Quick Optimization**.

Common Operations



- Click **Check Integrity** button to check if there are any problems in the the database operating.
 - Click **Restore** button to restore your database from the backup file. More Details...
 - Click **Run Update Script** to update the TO3000 database using scripts. More Details...
-

2nd copy



Click **Repair** button to try to repair the database. More details...

For more details please see Database Operations

5 Clients

5.1 Main page of the Client window

On the **Main** page of the **Client** window you can create a new client record, enter and edit general clients information including financial aspects of clients, such as payment terms, client currency and others.

To open the **Main Client** page click on the **Client** icon from the **Clients** part of the **Navigation** panel and switch to the **Main** tab or click menu **Navigation > Client > Main**.

The general view of the **Main** page of the **Client** window:

The screenshot shows a software interface for managing clients. The window title is "Client: Alter Ego Solutions". At the top, there is a navigation bar with tabs: Main, Contacts, Marketing, Prices, Quotes, Projects, Client Jobs, Invoices, Payments, Account, Info, and Files. Below the navigation bar, there are buttons for "New Client", "Clone", "Delete", and "Help". A search field labeled "Starts with" is present. The main area is split into two panes. The left pane displays a list of client names, with "Alter Ego Solutions" selected and highlighted in blue. Other names in the list include "Another Way Software", "Astral Dust Records", "Candlelight Magazine", "Chameleon Decorations Corp.", "Clouds Holograms Inc.", "E-Mania Pharmacy", "Electric Dream Design", "Forever Reflections Publishing", "Mythology Development Company", "Ocean World University", "Parallel Dimensions Travel Ltd.", "Pocket Moon Souvenirs", "Pocket Moon Souvenirs - US", "Rainbow Chasers Community", "Silent Secrets Museum", "Skywatcher Optics Ltd.", "Snowmaker Corporation", "Wilderness Protection Company", "Winged Motors Corporation", and "Wishmaster Guild Entertainment". At the bottom of the list, it says "Clients Displayed: 21" and "Total in Database: 21". The right pane shows the "Client Profile" for "Alter Ego Solutions". It includes fields for "Client Code" (ALTEGO), "Name" (Alter Ego Solutions), "Postal Address" (Kauppatori 4, Oulu, Finland, 90100), "Contact Info" (E-mail: info@anycount.com, translations@anycount.com; Phone: 1-888-111-111-333-333, 1-555-444-555-333-000), "Web site" (www.projtex.com), "Payment Terms" (On day 10 of the next month (from Invoice date)), "VAT Number" (FI12345678), "Client Folder" (C:\Business\Clients\ALTEGO\), and "Client Currency" (EUR). There are also buttons for "Next Codes" and "Locale Format". A "General Information" section at the bottom contains a block of placeholder text: "Cras eget mi. Integer at urna non nunc consectetur dictum. Maecenas id pede tincidunt est. Integer bibendum nonummy magna. Sed nibh. Etiam rutrum, mauris sagittis lectus lorem nec arcu. Integer eleifend dui. Pellentesque habitant morbi t ac turpis egestas. Phasellus vitae dui. Nam dapibus diam ac eros."

Main page of the **Client** window combines clients list and clients profile information.

Tools for managing the client list are grouped in the left part of the page.

Starts with:

Name
Alter Ego Solutions
Another Way Software
Astral Dust Records
Candlelight Magazine
Chameleon Decorations Corp.
Clouds Holograms Inc.
dsfs
E-Mania Pharmacy
Electric Dream Design
Forever Reflections Publishing
Mythology Development Company
Ocean World University
Parallel Dimensions Travel Ltd.
Pocket Moon Souvenirs
Pocket Moon Souvenirs - US
Rainbow Chasers Community
Silent Secrets Museum
Skywatcher Optics Ltd.
Snowmaker Corporation
Wilderness Protection Company
Winged Motors Corporation

Clients Displayed: 22
 Total in Database: 22

The names of the clients are displayed in the **Name** box, and at the end of this box you can easily check the number of clients displayed, and the total number of clients in the database.

 **Note:** these numbers can differ if the Local Custom Filter is switched on.

Use **New Client**, **Clone** and **Delete** buttons to correspondingly add new client, create a copy of the client or delete client from the database.

For details please see:

Adding a new Client

Deleting a Client

You can search for a particular client by entering the client's initials in the active field **Starts with**. Simply type the initials, and if the initials match the name on the list, it becomes highlighted.

Starts with:

Name
Alter Ego Solutions
Alter Ego Solutions -CLONED
Another Way Software
Astral Dust Records
Astral Dust Records -CLONED
Candlelight Magazine
Chameleon Decorations Corp.

Or you can select **Contains** from the drop-down list above the **Clients** list and enter the letters the required **Client Name** contains:

You can also simplify the search by filtering client records, using Local Custom Filter.

On the right side of the **Main** client page, you have two tabs: **Client Profile** and **Custom**, which enable you to review and modify the client's information.

For details on working with client information on the **Client Profile** and **Custom** tabs of the **Main Client** page please see Viewing and changing Client details

See Also:

Adding a new Client

5.2 Adding a new Client

You can add a new **Client** to **Translation Office 3000** database either by adding a completely new **Client** record or by copying the existing one (this option can be useful if you need to keep the finance records of one client in different currencies, different from your **Base Currency**, for example).

Below all ways of adding a new **Client** to **TO3000** database are described.

To create a new Client record:

1. Open the **Client** window and switch to the **Main** tab.

For this click on the **Client** icon from the **Navigation** panel and switch to the **Main** tab:



or click menu **Navigation > Client > Main**.

The general view of the **Client** window:

The screenshot shows the 'Client: Parallel Dimensions Travel Ltd.' window. The window has a menu bar with 'Main', 'Contacts', 'Marketing', 'Prices', 'Quotes', 'Projects', 'Client Jobs', 'Invoices', 'Payments', 'Account', 'Files', 'Info', and 'Schedule'. Below the menu bar are buttons for 'New Client', 'Clone', and 'Delete'. A 'Starts with' dropdown is present. A list of clients is shown on the left, with 'Parallel Dimensions Travel Ltd.' selected. The main area displays client details:

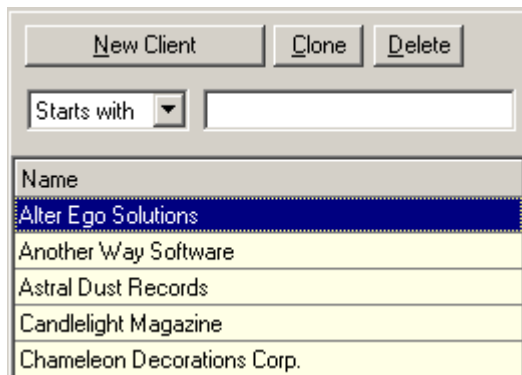
- Client Code:** PARADIM
- Name:** Parallel Dimensions Travel Ltd.
- Postal Address:** 55 Hampton Park Blvd. Capital Heights MD United States 20743
- Contact Info:** -None-
- Web site:** www.stranlation.com
- Payment Terms:** On day 10 of the next month (from Invoice date)
- VAT Number:**
- Client Folder:** None
- Client Currency:** USD


Buttons for 'Create' and 'Explore' are visible. At the bottom, it shows 'Clients Displayed: 21' and 'Total in Database: 21'.

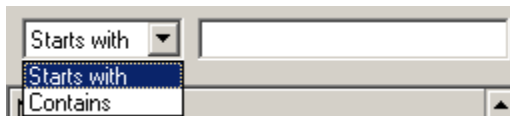
2. Click **New Client** button and fill the fields of the **New Client** window.
See Also: New Client window.

To create a new Client record via copying the existing one:

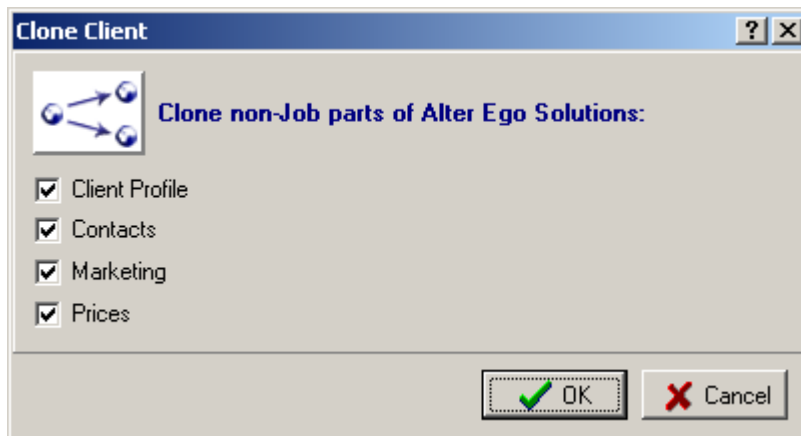
1. Select the record you want to copy from the **Clients** list:



 **Note:** If the **Client** list is very long and the name of the current client is not displayed, you may enter the first letters of the **Client** name into **Starts with:** field. Or you can select **Contains** from the drop-down list above the **Clients** list and enter the letters the required **Client Name** contains:



2. Click **Clone** button.
3. Check the details you want to copy selecting the corresponding options of the **Clone Client** window:



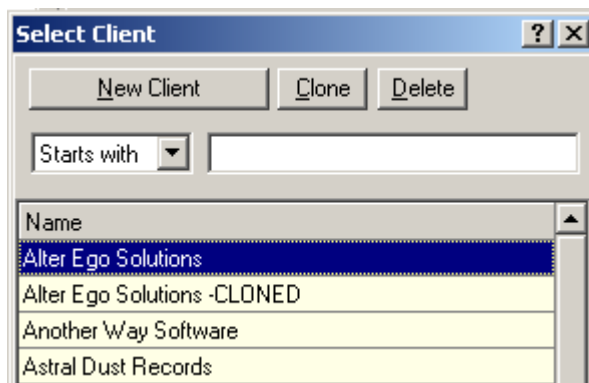
Click **OK** to save changes or click **Cancel** to discard.

The new **Client** will appear in the **Clients** list in the left part of the **Client** window and you will be able to view/change its profile on the **Client** profile tab on the right.

You can also create a completely new or copy the existing **Client** record from the **Project** window, when creating a new **Project**.

To create a new Client record when adding a new Project:

1. Open the **Project** window and switch to the **Main** tab.
2. Click **New Project** button.
3. When the **Select Client** window appears click **New Client** or **Clone** button.



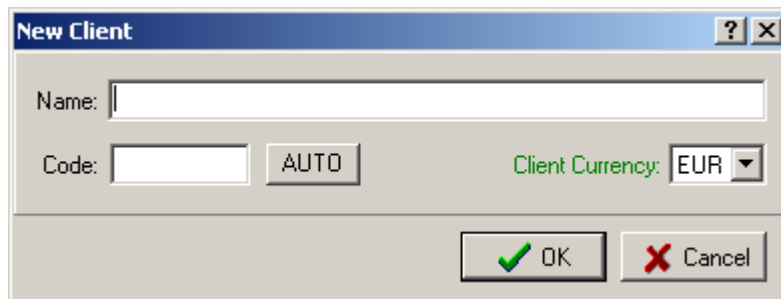
4. Fill the fields of the New Client window or specify the necessary options in the Clone Client window.

See Also: Changing Clients profile details.

5.2.1 New Client window

In the **New Client** window you can enter the basic information about the new client, when adding a new **Client** record to your **Translation Office 3000** database.

New Client window opens on the **New Client** button click from the **Client > Main** page or from the **Select Client** window called from the **Project > Main** page.



- Enter the name of the client in the **Name** text field.
- Enter the code for the **Client** record in the **Code** text field (15 symbols maximum) or click **AUTO** button to generate the code automatically (it will usually contain the first letters of the **Name** in this case).
- Select the **Client Currency** using the corresponding drop-down list.
See Also: Multi-Currency Support
- Click **OK** to confirm or **Cancel** to discard the entered information.

See Also: Adding a new Client

5.3 Viewing and changing Client details

After the new **Client** record was added to the **Translation Office 3000** database, it appears in the **Clients** list in the left part of the **Client** window and you can view/change its profile on the **Client** profile tab on the right.

You can also change **Client** name, code and currency from the Edit Client window. To open it double-click the necessary **Client** record from the **Client** list on the **Main Client** tab.

On the **Contacts** page of the **Client** window you can add information about the contacts persons of the client.

Client: Candlelight Magazine

Main | Contacts | Marketing | Prices | Quotes | Projects | Client Jobs | Invoices | Payments | Account | Info | Files | Schedule

New Client | Clone | Delete | Help

Starts with:

Name

- Alter Ego Solutions
- Another Way Software
- Astral Dust Records
- Candlelight Magazine**
- Chameleon Decorations Corp.
- Clouds Holograms Inc.
- E-Mania Pharmacy
- Electric Dream Design
- Forever Reflections Publishing
- Mythology Development Company
- Ocean World University
- Parallel Dimensions Travel Ltd.
- Pocket Moon Souvenirs
- Pocket Moon Souvenirs - US
- Rainbow Chasers Community
- Silent Secrets Museum
- Skywatcher Optics Ltd.
- Snowmaker Corporation
- Wilderness Protection Company
- Winged Motors Corporation
- Wishmaster Guild Entertainment

Clients Displayed: 21
Total in Database: 21

Client Profile | Custom

Client Code: **CANMAG**

Name: **Candlelight Magazine**

Postal Address: 866 Third Avenue
New York
United States
10022

Contact Info: E-mail: info@projetex.com
Fax: 2 334 555 333 563

Web site: www.projetex.com

Payment Terms: On day 1 of the month following next (from Invoice date)

VAT Number:

Client Folder: C:\Business\Clients\CANMAG\

Client Currency: EUR

General Information:

Ut sollicitudin, wisi quis suscipit tincidunt, leo lorem iaculis urna, sit amet pharetra ante est ut sem. Ut rhoncus. Nullam imperdiet. Integer lectus leo, elementum non, iaculis in, hendrerit sit amet, odio. Etiam interdum molestie mi. Phasellus purus sapien, dignissim eu, condimentum vel, iaculis non, urna. Curabitur tristique lacus sit amet nulla molestie posuere. Donec venenatis molestie eros. Integer leo lectus, ullamcorper quis, bibendum eu, dictum et, quam. Vivamus magna lorem, ornare quis, vehicula nec, ultrices vitae, ligula. Phasellus enim augue, mattis eget, lobortis nec, pulvinar eget, tellus. Aliquam ultricies, dolor et dapibus pulvinar, magna metus ullamcorper purus, ut hendrerit ipsum lorem quis quam. Maecenas fermentum mattis nunc. Ut vestibulum scelerisque ante. Aliquam et augue. Donec sit amet nunc sit amet mi placerat adipiscing. Integer mollis, nunc ac consectetuer volutpat, massa sapien luctus enim, at cursus lorem massa non nibh. Ut sollicitudin, wisi quis suscipit tincidunt, leo lorem iaculis urna, sit amet pharetra ante est ut sem. Ut rhoncus. Nullam imperdiet. Integer lectus leo, elementum non, iaculis in, hendrerit sit amet, odio. Etiam interdum molestie mi. Phasellus purus sapien, dignissim eu, condimentum vel, iaculis non, urna. Curabitur tristique lacus sit amet nulla molestie posuere. Donec venenatis molestie eros. Integer leo lectus,

Changing Client details:

You can edit client's information from the **Client Profile** tab of the **Main** page of the **Client** window.

Client Profile Custom

Client Code: **ALTEGO**

Name: **Alter Ego Solutions**

Postal Address: Kauppatori 4
Oulu
Finland
90100

Contact Info: E-mail: info@anycount.com, translations@anycount.com
Phone: 1-888-111-111-333-333, 1-555-444-555-333-000

Web site: www.projetex.com

Payment Terms: On day 10 of the next month (from Invoice date)

VAT Number: FI12345678

Client Folder: None

Client Currency: EUR

General Information:

Cras eget mi. Integer at urna non nunc consectetur dictum. Maecenas id pede et velit accumsan dignissim. In pretium dui

- by clicking this tab, you can enter or change the client's code of no more than 15 characters in the field of the pop-up **Edit Client** dialog box. It is the same code, which you have assigned, manually or automatically, when created the new client record using **New Client** button, mentioned above.

Edit Client [?] [X]

Client Code: **ALTEGO** (maximum 15 characters)

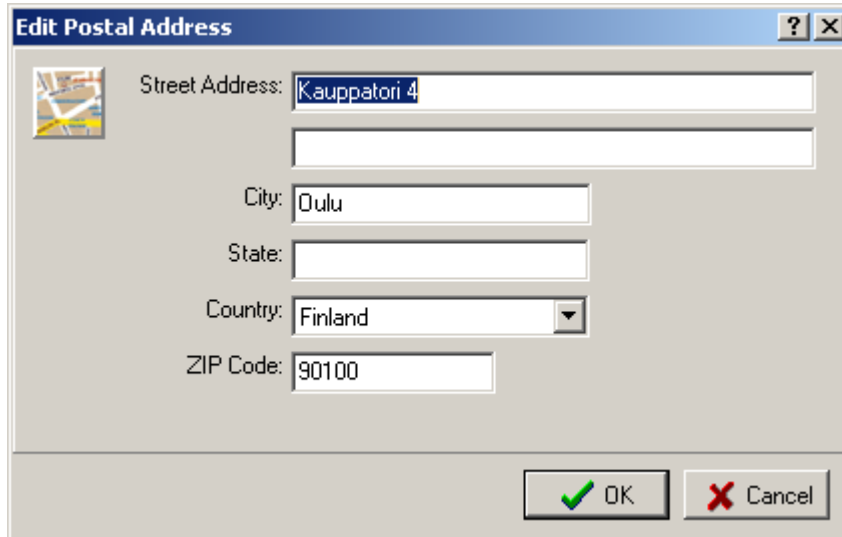
- displays a name of the client you entered. By clicking this button, you can change or make corrections in the name in the appearing **Edit Client Name** dialog box. Then, either confirm the changes by clicking **OK**, or discard them by clicking **Cancel**.

Edit Client Name [?] [X]

Name:

Alter Ego Solutions

- **Postal Address:** – allows you to add or change a postal address of the client. On **Postal Address** button click the **Edit Postal Address** dialog box appears, where you can enter street, city, state and other client postal information. You can choose a country of freelancer by clicking the down arrow of the drop-down Country list. When finished, click **OK** to save the changes, or **Cancel** to discard them.

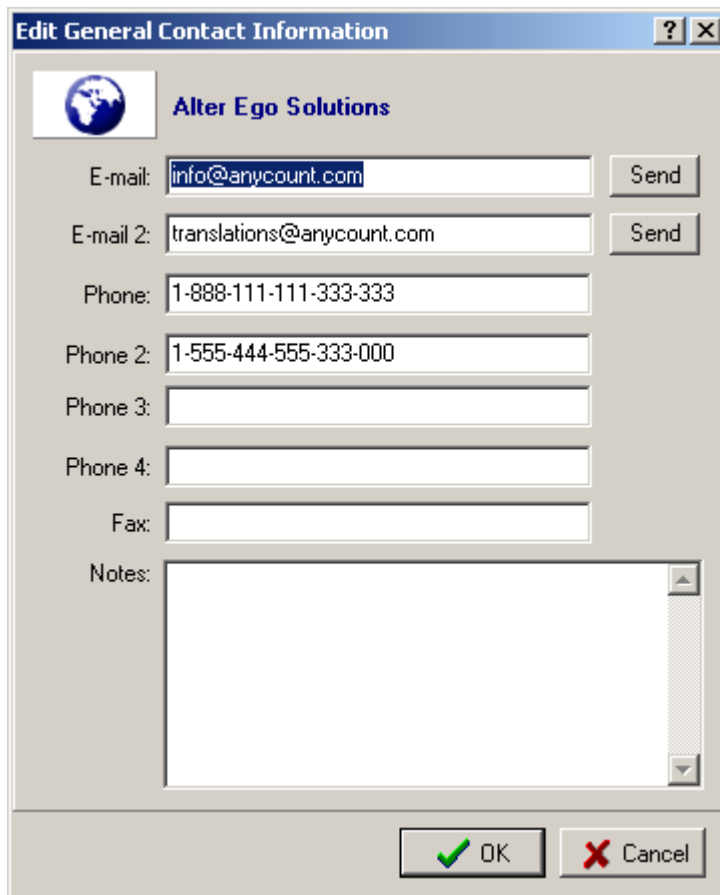


The screenshot shows a dialog box titled "Edit Postal Address". It contains the following fields and values:

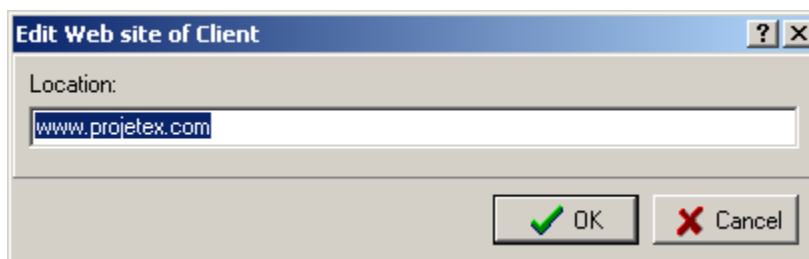
- Street Address: Kauppatori 4
- City: Oulu
- State: (empty)
- Country: Finland (dropdown menu)
- ZIP Code: 90100

At the bottom right, there are two buttons: "OK" (with a green checkmark) and "Cancel" (with a red X).

- **Contact Info:** – allows you to add or change contact information of the client. By clicking this button, you open **Edit General Contact Information** dialog box. This box contains fields for entering two e-mail addresses, four phone numbers, fax number and some additional information. **Send** buttons on the right of the **E-mail/E-mail 2** text fields allows you to send an e-mail message directly to the provided e-mail addresses simply on click.



- Web site: – opens **Edit Web site of Client** dialog box, providing the field for entering a Web site address of your client.



Go button (on the right of the **Web site**) click points your Internet-browser to the provided Internet address.

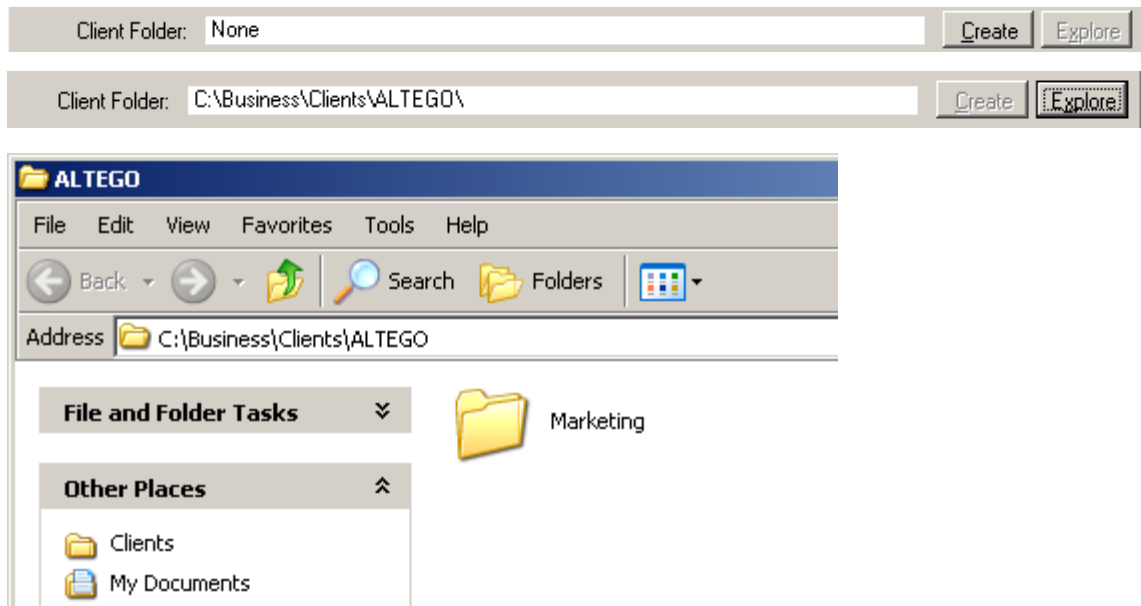
- Payment Terms: – allows you to specify a payment day for clients, and their minimum fees. To set payment terms, click the **Payment Terms** button, and in the appearing **Edit Payment Terms** dialog box specify the minimum fee for payments from this client, and a payment day from the receiving of invoice by selecting the corresponding option. Please note, that in the first option **Within...days**, you have a range of days to choose from the drop-down list. Simply click the down arrow, and choose the necessary number of days. If none of the options meets

your conditions you have the last option **Unknown/Other**. In the **Additional Notes** box you can add some extra conditions to the chosen option or specify the details if having chosen **Unknown/Other**.

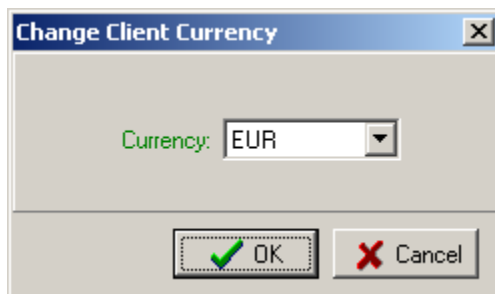
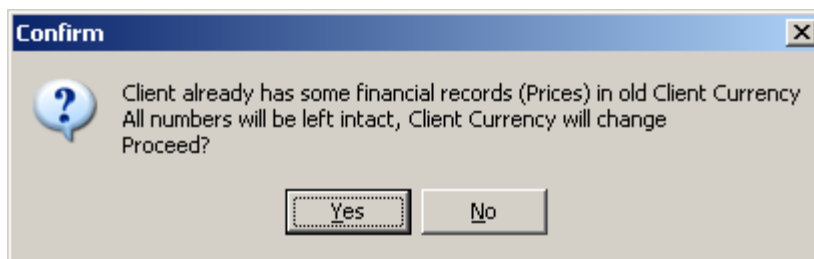
- VAT Number: – allows you to enter or change a VAT number of your client. Click on the **VAT Number** button, and in the **Edit Client VAT Number** dialog box enter the necessary information.

- Client Folder** – shows you the location of the client's folder. You can create by clicking **Create** button on the right from the **Client Folder** field. By default the client's folder will be created on

disk C. When the folder is created, the **Explore** button becomes active. Click it to open the client's folder in the Windows Explorer window.

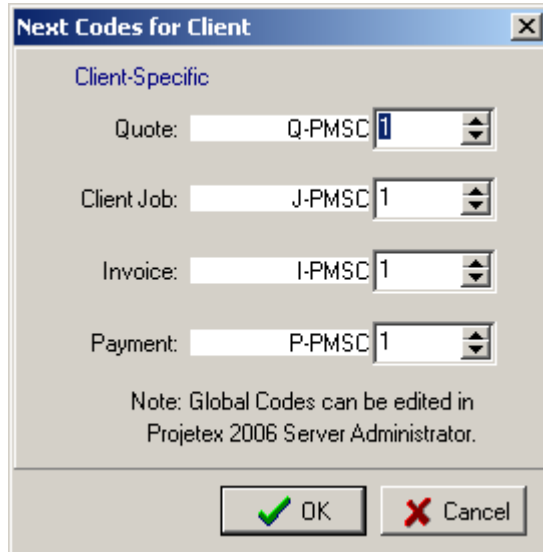


- Client Currency: – allows you to set the client's currency. On **Client Currency** button click the **Change Client Currency** dialog box appears, displaying the drop-down list for choosing the currency. If the currency has been previously set and some financial records were created for this client, the **Confirm** window appears first, warning you that if you choose to proceed, the client's currency will be changed, but all numbers will stay intact.

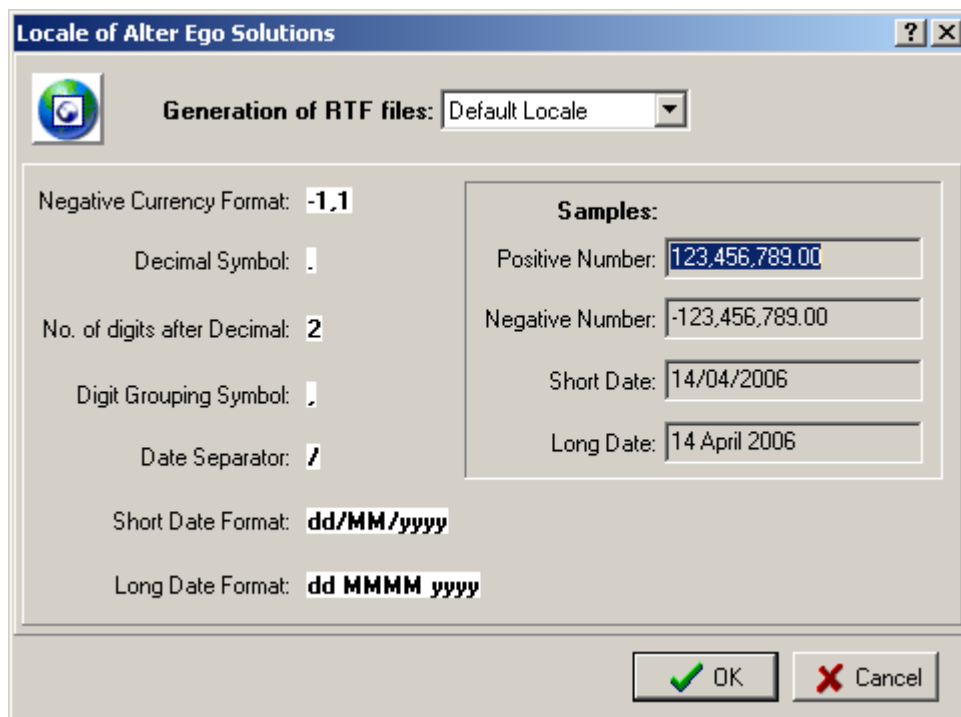


- Next Codes – allows you to set or change clients codes for different items, such as quote, job,

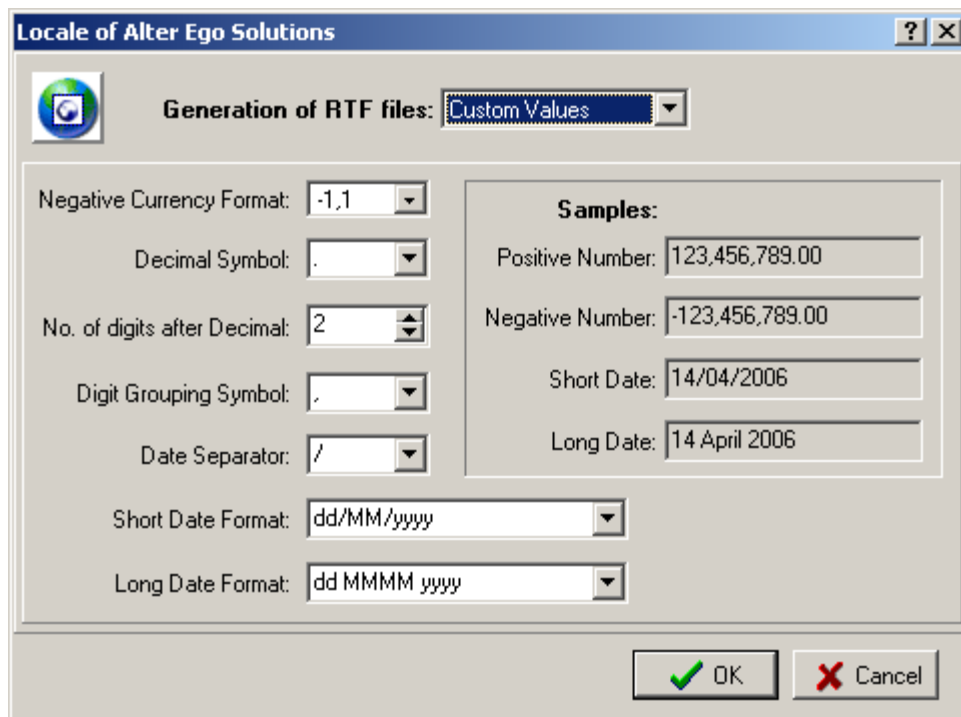
invoice and so on. Click **Next Codes** button and in the appeared **Next Codes for Clients** dialog box set or change the necessary code values by clicking up or down arrows of the corresponding fields. Then, click **Yes** to save the changes, or **Cancel** to exit without saving them.



- **Locale Format** – enables you to set the view of data input into your files according to several options, which include among others decimal symbol, data separator, long and short date formats, and so on. Click the **Locale Format** button to open the **Locale of...** dialog box. It should be pointed out that in the **Generation of RTF files** active field you have a choice of setting a view of data input. You can set it either to **Default Locale** or change it to **Custom Values**.

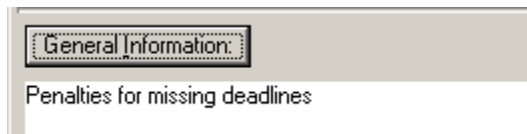
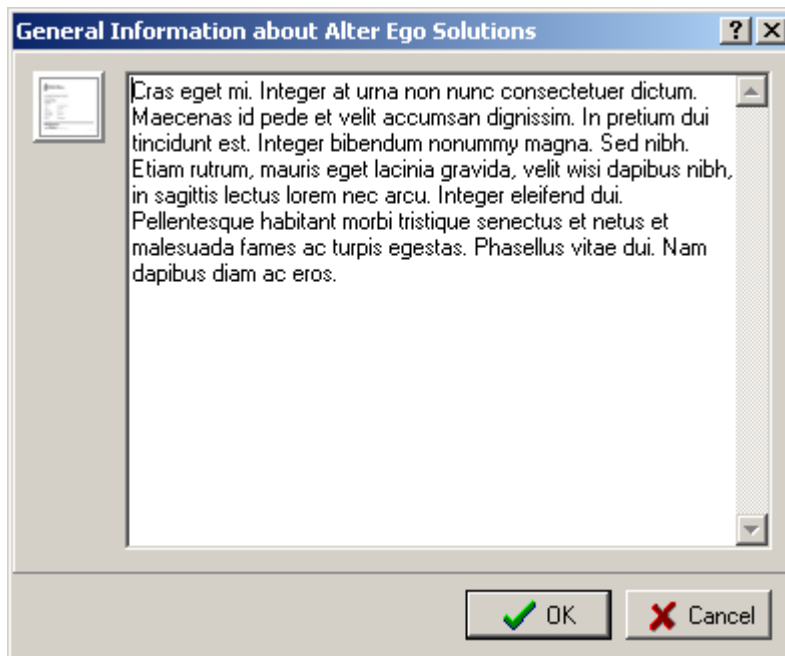


When **Custom Values** is selected, drop-down lists for changing the displayed options appear.



- **General Information:** Opens **General Information about...** text box where you can enter any

additional information about the client. It will be displayed under the **General Information** button.



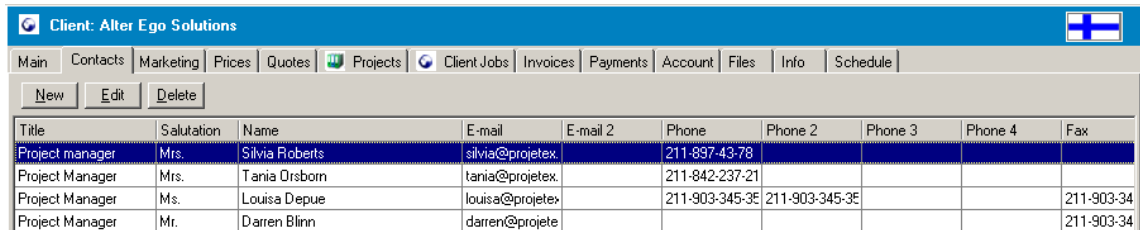
Under the tab **Custom**, you can enter any private information about your clients, such as names of directors, business trends, first contact date and so on.



For storing each type of information you can create custom fields and group them on tabs at your will. Custom fields and tabs are created on the [Custom Fields page of the Advanced Settings window](#).

On the **Contacts** page of the **Client** window you can create, edit and delete information on the

contact persons of the selected client (the client is selected on the Main page of the Client window; the name of the selected client is displayed in the **Client** window caption; e.g. the next screenshot shows **Contacts** page for Alter Ego Solutions).




Title	Salutation	Name	E-mail	E-mail 2	Phone	Phone 2	Phone 3	Phone 4	Fax
Project manager	Mrs.	Silvia Roberts	silvia@projete		211-897-43-78				
Project Manager	Mrs.	Tania Orsborn	tania@projete		211-842-237-21				
Project Manager	Ms.	Louisa Depue	louisa@projete		211-903-345-3E	211-903-345-3E			211-903-34
Project Manager	Mr.	Darren Blinn	darren@projete						211-903-34

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

Each **Contact** has the following properties:

- **Title**,
- **Salutation**,
- **Name**,
- **E-mail**,
- **E-mail 2**,
- **Phone**,
- **Phone 2**,
- **Phone 3**,
- **Phone 4**,
- **Fax**.

 **Note:** You can sort out the contacts on this page by each attribute just by clicking on the corresponding column name. You can also change the columns order according to your preferences, customize which columns to be displayed or switch to the vertical view of the table. For details, see General features > User Interface > Tables.

If you want to add a contact, click **New** button, and in the pop-up **New Contact** window you can enter the necessary information. You can also write down some notes in the **Notes** box. Having done it, click **OK** to save the changes, and to add the new contact to the database, or click **Cancel** to discard the new contact setting.

If you want to edit the existing contact, select it from the list by clicking on it and then click **Edit** button or just double-click the contact you wish to edit. In both cases the **Edit Contact** pop-up window will appear. Here you can change the necessary information about this contact, and then click **OK** to save the changes or click **Cancel** to leave without saving the changes.

New Edit Delete									
Title	Salutation	Name	E-mail	E-mail 2	Phone	Phone 2	Phone 3	Phone 4	Fax
Chief executive	Dr.	John Stevenson							
Executive Director	Mrs.	Jessie Classen							

Edit Contact

Salutation: Dr.

Name: John Stevenson

Title: Chief executive

E-Mail: Send

E-Mail 2: Send

Phone:

Phone 2:

Phone 3:

Phone 4:

Fax:

Notes:

OK Cancel

To delete the contact, select it from the list by clicking on it and click **Delete** button. In the pop-up **Confirm** window click **Yes** to delete the contact, or click **No** to exit the window without deleting of the contact.

Confirm

Selected item will be deleted. Proceed?

Yes No

5.3.1 Edit Client window

In the **Edit Client** window you can modify **Client Name**, **Code** or change the **Client Currency** of a particular **Client**.

To open it double-click the necessary **Client** record from the **Client** list on the **Main Client** tab.

The general view of the **Edit Client** window:

- You can modify the name of the client in the **Name** text field.
- You can modify the code of the **Client** record in the **Code** text field (15 symbols maximum) or click **AUTO** button to generate the code automatically (it will usually contain the first letters of the **Name** in this case).
- Select the **Client Currency** using the corresponding drop-down list.
See Also: Multi-Currency Support
- Click **OK** to confirm or **Cancel** to discard the entered information.

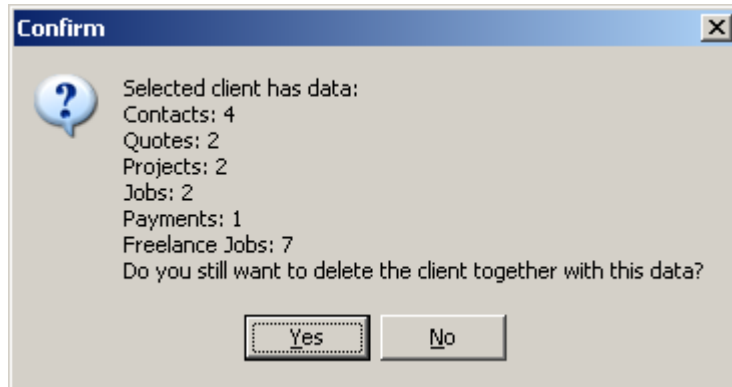
See Also: Viewing and changing Client details


5.4 Deleting a Client

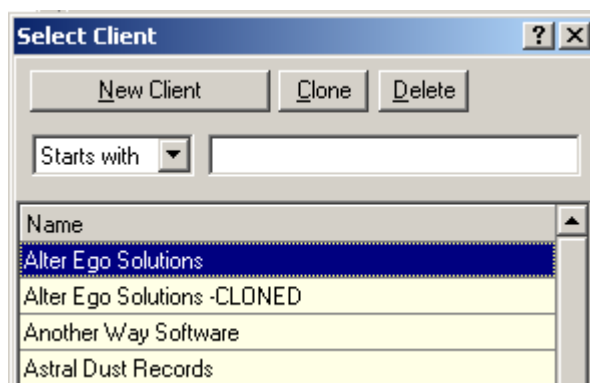
To delete a **Client** record:

1. Select it from the **Client** list on the **Main** page of the **Client** window and click **Delete** button:

2. Confirm the deletion clicking **Yes** in the **Confirm** dialog box, displaying the **Client** data, that will be deleted together with the **Client** record.

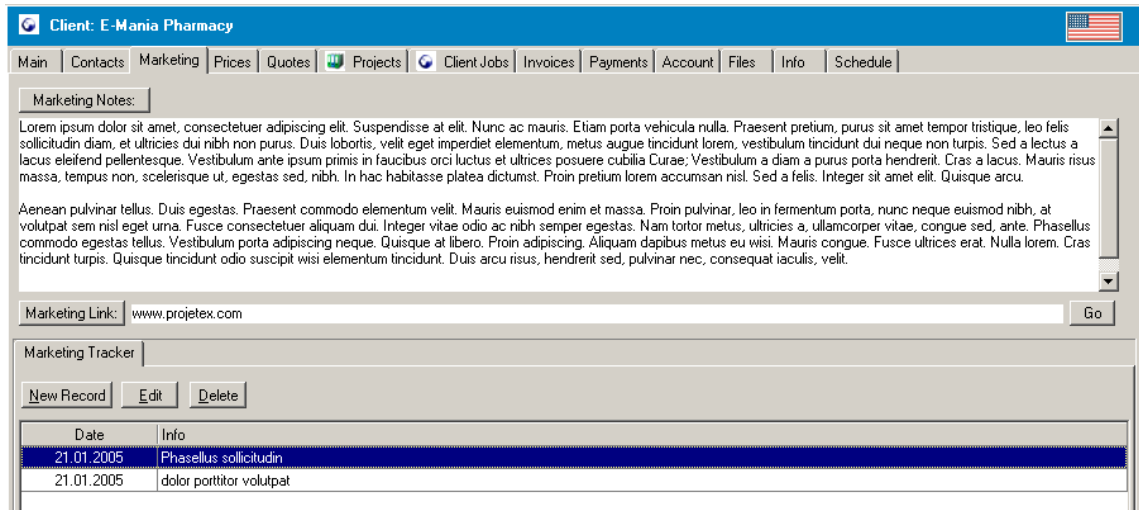


 **Note:** You can also access **Client** list and delete a **Client** record as described above, from the **Main** tab of the **Project** window when creating a new **Project**: on **New Project** button click **Select Client** window opens, containing **Client** list and **New Client**, **Clone** and **Delete** buttons:



5.5 Marketing story of a Client

You can store marketing information concerning the selected client (the client is selected on the Main page of the Client window On the **Marketing** page of the **Client** window; the name of the selected client is displayed in the **Client** window caption; e.g. the next screenshot shows **Contacts** page for **Pocket Moon Souvenirs - US**).



Client: E-Mania Pharmacy

Main | Contacts | Marketing | Prices | Quotes | Projects | Client Jobs | Invoices | Payments | Account | Files | Info | Schedule

Marketing Notes:

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Suspendisse at elit. Nunc ac mauris. Etiam porta vehicula nulla. Praesent pretium, purus sit amet tempor tristique, leo felis sollicitudin diam, et ultricies dui nibh non purus. Duis lobortis, velit eget imperdiet elementum, metus augue tincidunt lorem, vestibulum tincidunt dui neque non turpis. Sed a lectus a lacus eleifend pellentesque. Vestibulum ante ipsum primis in faucibus orci luctus et ultrices posuere cubilia Curae; Vestibulum a diam a purus porta hendrerit. Cras a lacus. Mauris risus massa, tempus non, scelerisque ut, egestas sed, nibh. In hac habitasse platea dictumst. Proin pretium lorem accumsan nisl. Sed a felis. Integer sit amet elit. Quisque arcu.

Aenean pulvinar tellus. Duis egestas. Praesent commodo elementum velit. Mauris euismod enim et massa. Proin pulvinar, leo in fermentum porta, nunc neque euismod nibh, at volutpat sem nisl eget urna. Fusce consectetur aliquam dui. Integer vitae odio ac nibh semper egestas. Nam tortor metus, ultricies a, ullamcorper vitae, congue sed, ante. Phasellus commodo egestas tellus. Vestibulum porta adipiscing neque. Quisque at libero. Proin adipiscing. Aliquam dapibus metus eu wisi. Mauris congue. Fusce ultrices erat. Nulla lorem. Cras tincidunt turpis. Quisque tincidunt odio suscipit wisi elementum tincidunt. Duis arcu risus, hendrerit sed, pulvinar nec, consequat iaculis, velit.

Marketing Link: Go

Marketing Tracker

New Record | Edit | Delete

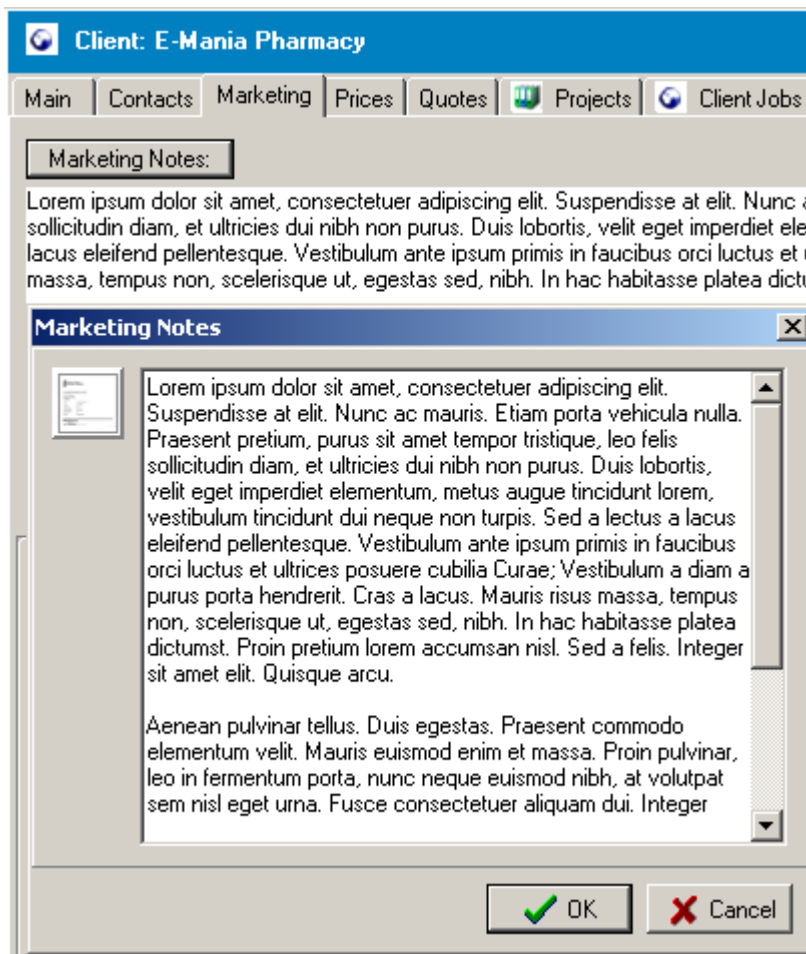
Date	Info
21.01.2005	Phasellus sollicitudin
21.01.2005	dolor porttitor volutpat

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

On the **Marketing** page you can enter three types of marketing information:

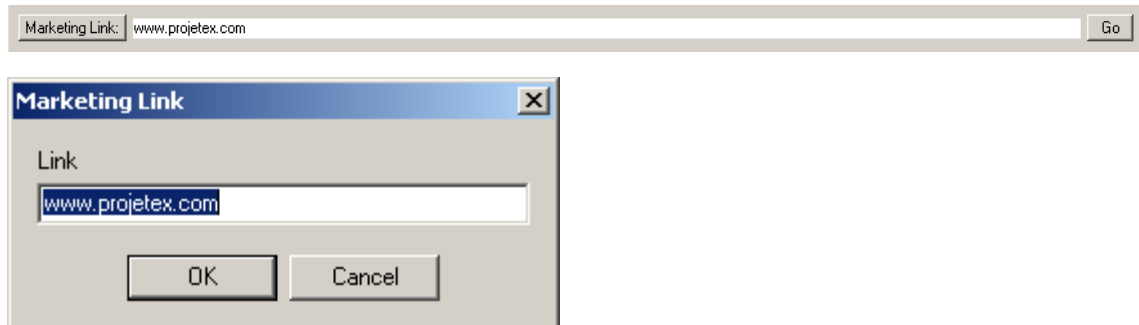
- General marketing notes (text).

To add general marketing notes click **Marketing Notes**: button and enter the text into the **Marketing Notes** box displayed.



- Hyper-link to the web site, somehow concerning your marketing activity.

If you want to add a marketing link, click the **Marketing Link** button, and enter the URL in the pop-up **Marketing Link** window. **Go** button (on the right of the **Marketing Link**) click points your Internet-browser to the provided Internet address.

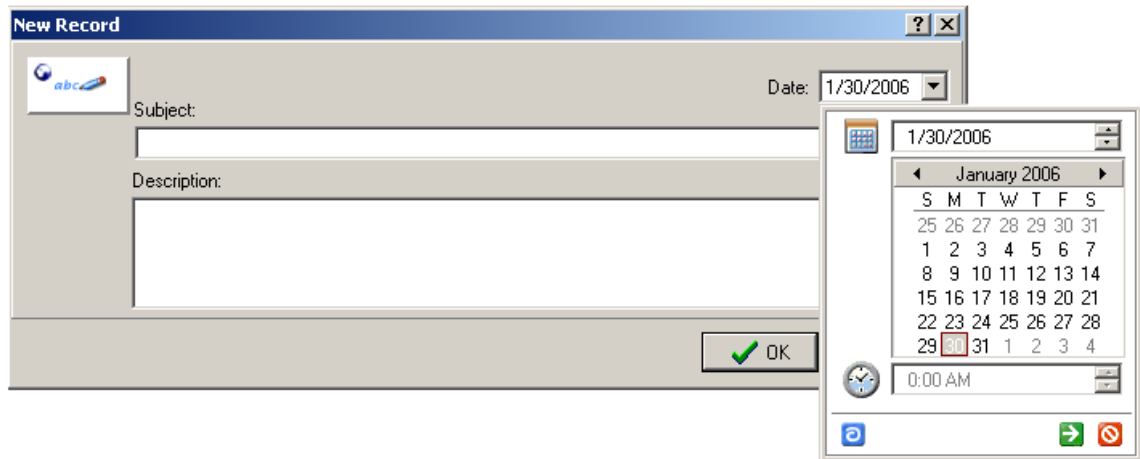


- Specific marketing events, with data and description.

The lower part of the **Marketing** page is called **Marketing Tracker**. Here you can add a new

record for a certain marketing event, set its date and some info about it.

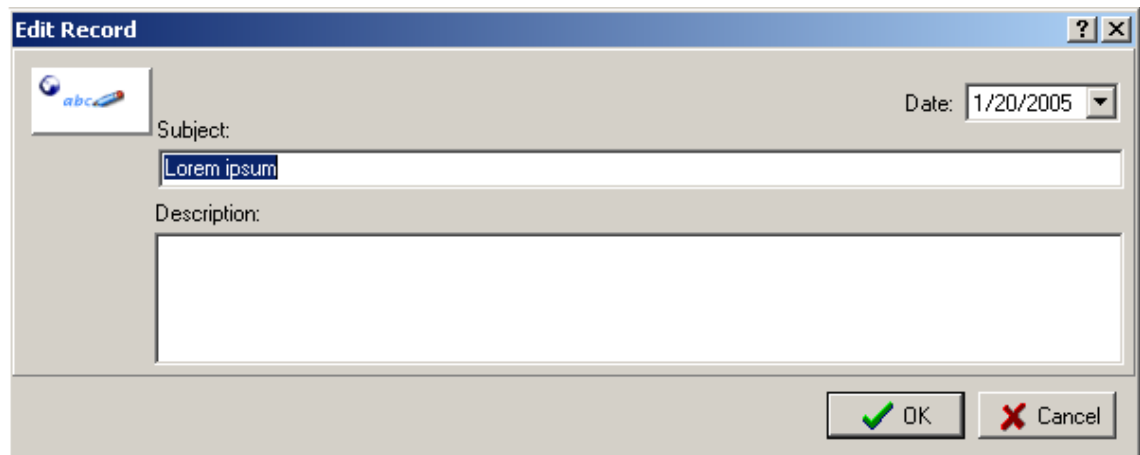
To add a record click **New Record** button, **New Record** window will appear. Enter the description of the event, and set the date by clicking on the down arrow of the **Date** field, and choose the appropriate date from the drop-down **Calendar** box.



Besides, in the **Calendar** box you can also set a month of the event by clicking on the left or right arrow of the month displaying button (on the screenshot above it contains "January 2006" string). Or you can set a month by clicking up and down arrows of the date field in the **Calendar** box. When finished, click on the green pictogram to apply the changes, or on the red one to leave without saving. In addition, you have a possibility to set the current date by clicking on the blue pictogram at the bottom of the **Calendar** box.

Having finished entering information about the event click **OK** to apply the changes, or click **Cancel** to discard them. The new record with the date will be added to the **Marketing Tracker** box in the first case.

You can also edit or delete existing **Marketing** records. To edit the note, select it from the list and click **Edit** button or simply double-click the record. Change the necessary information in the **Edit Record** window displayed; click **OK** to save the changes, or click **Cancel** to discard them.



To delete the record select it from the list and click **Delete** button; the note will be deleted after confirmation.

Finally, you can sort your entries in the **Marketing Tracker** box by **Date** or by **Info**. For this purpose, simply click on the corresponding column caption.

5.6 Prices managing

Translation Office 3000 V8 provides you with a highly efficient price managing mechanism: you only need to enter the prices of your services once and later you can get the price on one button click. You can create a separate price list for each client and/or store the general price list and apply it if there is no special price policy for a client.


Price list of a particular client can be managed on the **Prices** page of the **Client** window.

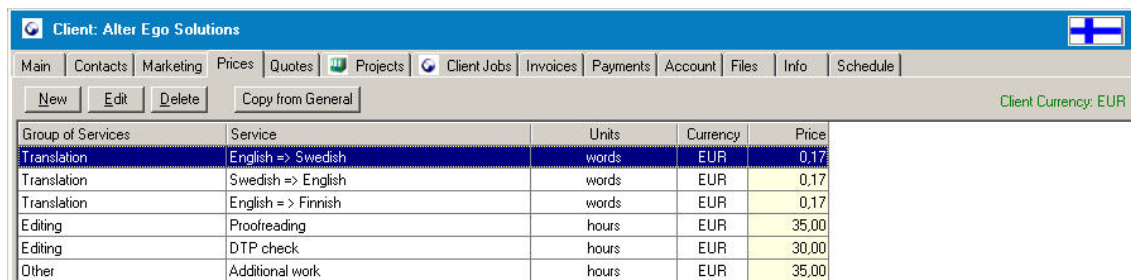
The general price list is available from the **General Prices for Clients** window.

See below for details.

Price list for a particular Client (Price page of the Client window)

Prices page of the **Client** window allows you to review, create and edit price records for different services for the selected client: what group of services, the service itself, units of work, its price and currency.

 **Note:** The client is selected on the Main page of the Client window; the name of the selected client is displayed in the **Client** window caption; e.g. the next screenshot shows **Prices** page for **Alter Ego Solutions**).

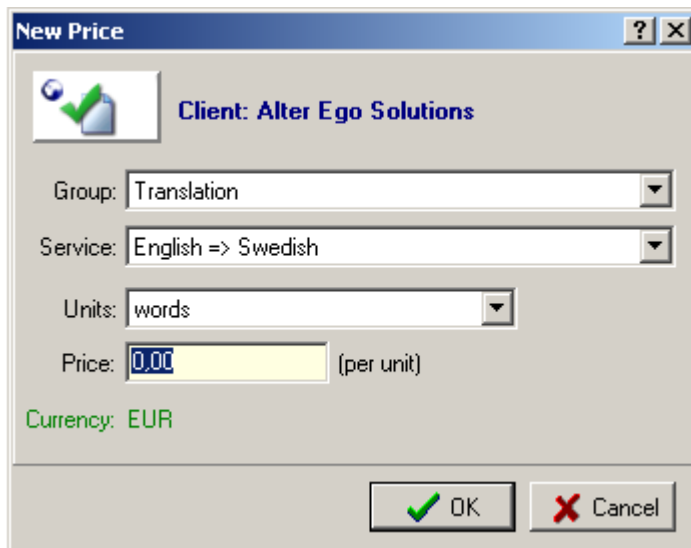


Group of Services	Service	Units	Currency	Price
Translation	English => Swedish	words	EUR	0,17
Translation	Swedish => English	words	EUR	0,17
Translation	English => Finnish	words	EUR	0,17
Editing	Proofreading	hours	EUR	35,00
Editing	DTP check	hours	EUR	30,00
Other	Additional work	hours	EUR	35,00

To open the **Prices** page, click the **Client** icon from the **Clients** part of the **Navigation** panel window and switch to the **Prices** tab or click menu **Navigation > Client > Prices**.

Prices page of the has four buttons: **New**, **Edit**, **Delete** and **Copy from the General**.

- Click **New** button to create the new price record. In the **New Price** dialog box set the **Group**, **Service** and **Units** from the drop-down lists provided and enter the **Price** (per unit) for the selected **Client**. Click **OK** to save the settings or click **Cancel** to discard them.



New Price

Client: Alter Ego Solutions

Group: Translation


Service: English => Swedish

Units: words

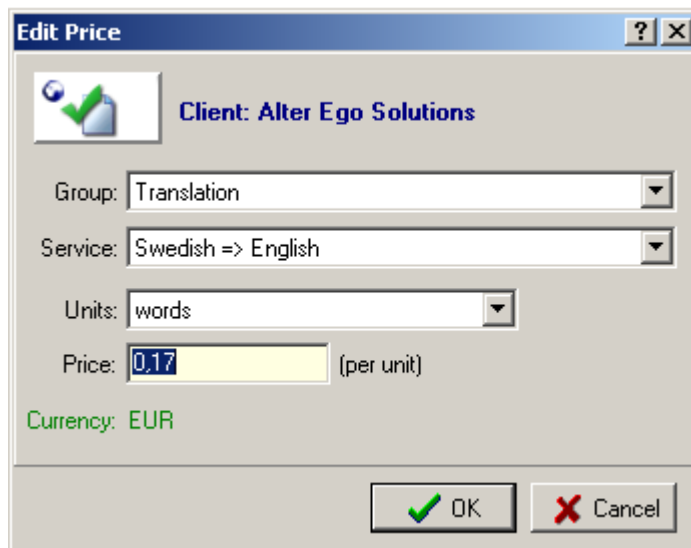
Price: 0.00 (per unit)

Currency: EUR

OK Cancel

 **Note:** available groups of services, services and units and can be added/edited/deleted on correspondingly **Groups of Services**, **Services** and **Volume Units** pages of **Business Settings** window (to open it click **Business Settings** command of the **Settings** menu).

Click **Edit** button to change the values of the selected records.



Edit Price

Client: Alter Ego Solutions

Group: Translation

Service: Swedish => English

Units: words

Price: 0.17 (per unit)

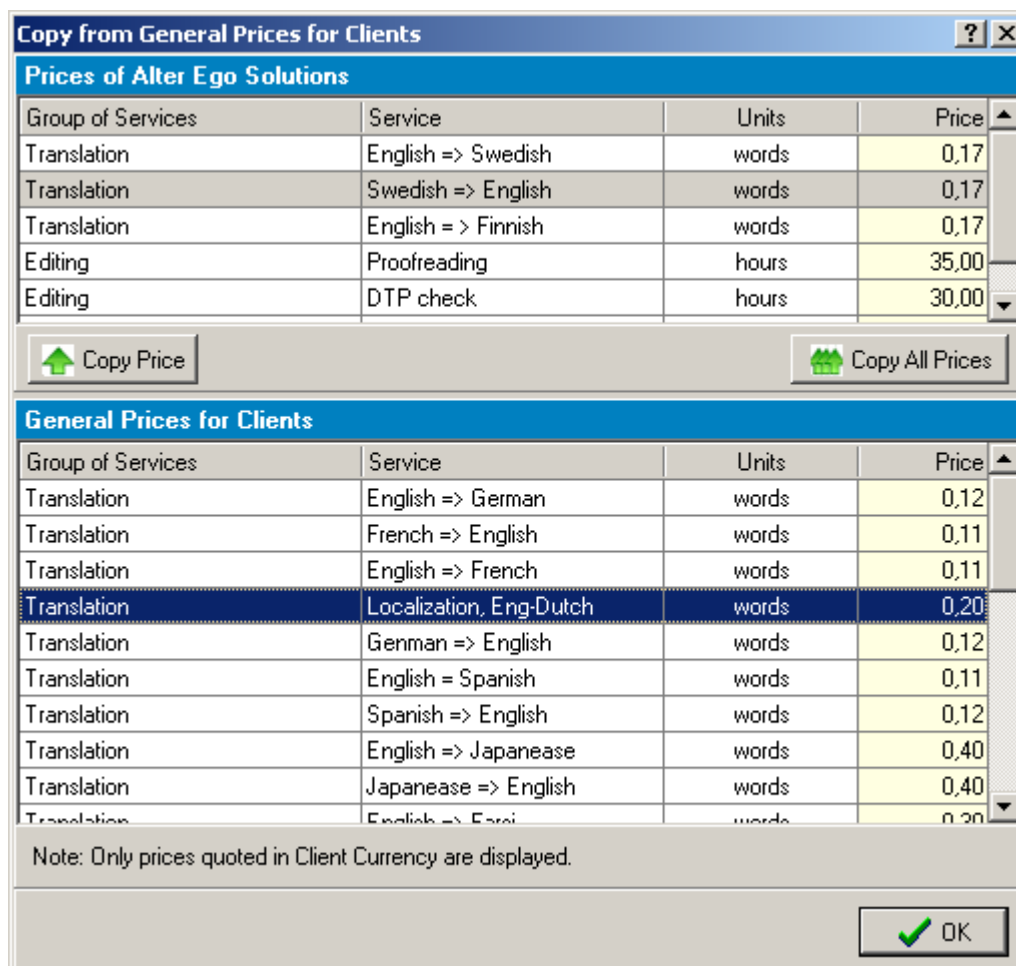
Currency: EUR

OK Cancel

Edit Price dialog box contains the same fields as **New Price** dialog box described above. When finished, click **OK** to save your changes, or **Cancel** to exit without saving them.

Click **Delete** button to edit the existing service record. After clicking you will be asked to confirm the deletion.

Copy from General button allows you to copy prices from the **General Prices** directly to the **Prices** page of a particular client. On **Copy from General** button click opens **Copy from General Prices for Clients** dialog box; it is divided into two parts. The upper part is for prices of a particular client, and the lower part is a **General Prices for Clients** dialog box, where general prices for this or that service are already set.



To copy the **Service** from **General Prices for Clients** select the necessary **Service** from the bottom part and click **Copy Price** button.

Use **Copy All Prices** button to copy all records of **General Prices for Clients** list to the **Prices** list of the particular **Client**.
 Details on General Prices...

You can also save the price list as .RTF document or print it at once from TO3000: Select the template using the **RTF Templates** drop-down list and click **Save/Save&Open** or **Print** button:



See Also: Templates.

General Prices for Clients

In the **General Prices for Clients** window of TO3000 you can create a price list with standard prices for your services and apply it when there are no special price conditions for a client.


General Prices for Clients				
New Edit Delete Base Currency: EUR				
Group of Services	Service	Units	Currency	Price
Translation	English => German	words	EUR	0.12
Translation	French => English	words	EUR	0.11
Translation	English => French	words	EUR	0.11
Translation	Localization, Eng-Dutch	words	EUR	0.20
Translation	German => English	words	EUR	0.12
Translation	English => Spanish	words	EUR	0.11
Translation	Spanish => English	words	EUR	0.12
Translation	English => Japanese	words	EUR	0.40
Translation	Japanese => English	words	EUR	0.40
Translation	English => Farsi	words	EUR	0.30
Translation	English => Swedish	words	EUR	0.17
Translation	Swedish => English	words	EUR	0.17
Translation	English => Finnish	words	EUR	0.17
Translation	English => Dutch	words	EUR	0.12
Editing	Proofreading	hours	EUR	35.00
Editing	DTP check	hours	EUR	30.00
Editing	Implementing corrections	hours	EUR	35.00
Other	Additional work	hours	EUR	35.00
Consulting	Cultural Assessment	hours	EUR	40.00
Consulting	Multilingual Copywriting	hours	EUR	45.00
DTP Tasks	DTP in Quark XPress	hours	EUR	35.00
DTP Tasks	DTP in Adobe PageMaker	hours	EUR	35.00
DTP Tasks	DTP in Adobe FrameMaker	hours	EUR	35.00
Testing	Testing of Localized Software	hours	EUR	35.00

RTF Templates: General Prices for Clients - Template - English.rtf Save Save&Open Print

To open **General Prices for Clients** window click the corresponding icon from the Navigation panel or click **General Prices for Clients** command from **Navigation** menu.

To add a new Price record click **New** button. In the **New General Prices for Clients** window select the **Group** of services, **Service**, **Units**, **Currency** using corresponding drop-down lists and enter the **Price** value manually, click **OK** to save and exit or click **Cancel** to exit without saving.

New General Prices for Clients ? X



Group: Translation

Service: English => Finnish

Units: words

Price: 0,2 (per unit)

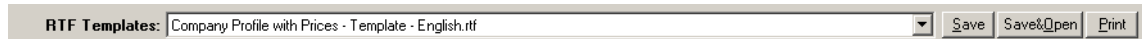
Currency: EUR

To edit the existing **Price** record, select it from the list and click **Edit** button. **Edit General Prices for Clients** window will open, where you can change **Group, Service, Units, Price** or **Currency** value. To confirm your editing click **OK**; to discard click **Cancel**.

To delete the existing price record, select it from the list and click **Delete** button. The record will be deleted after your confirmation.

As any table you can find in **Translation Office 3000 V8**, list of general prices in the **General Prices for Clients** window can be sorted by each column value by clicking the corresponding column caption. Right-click on the list to access **Customize Columns** and **Vertical View** commands, which allow to correspondingly customize which columns you want to be displayed and see the selected record in vertical view. See Right-click menu for details.

You can also save the price list as .RTF document or print it at once from **TO3000**: Select the template using the **RTF Templates** drop-down list and click **Save/Save&Open** or **Print** button:



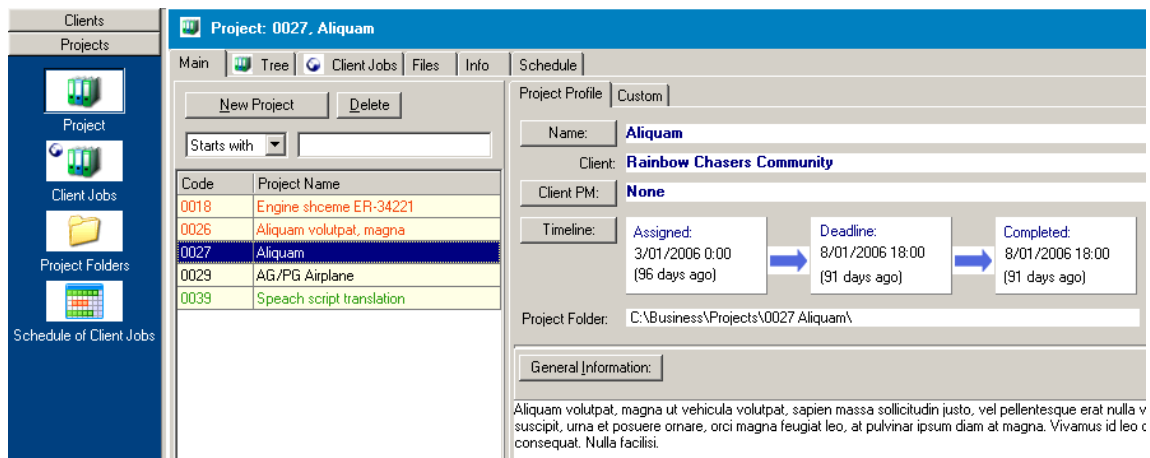
See Also: Templates.

6 Projects

6.1 Main Project page

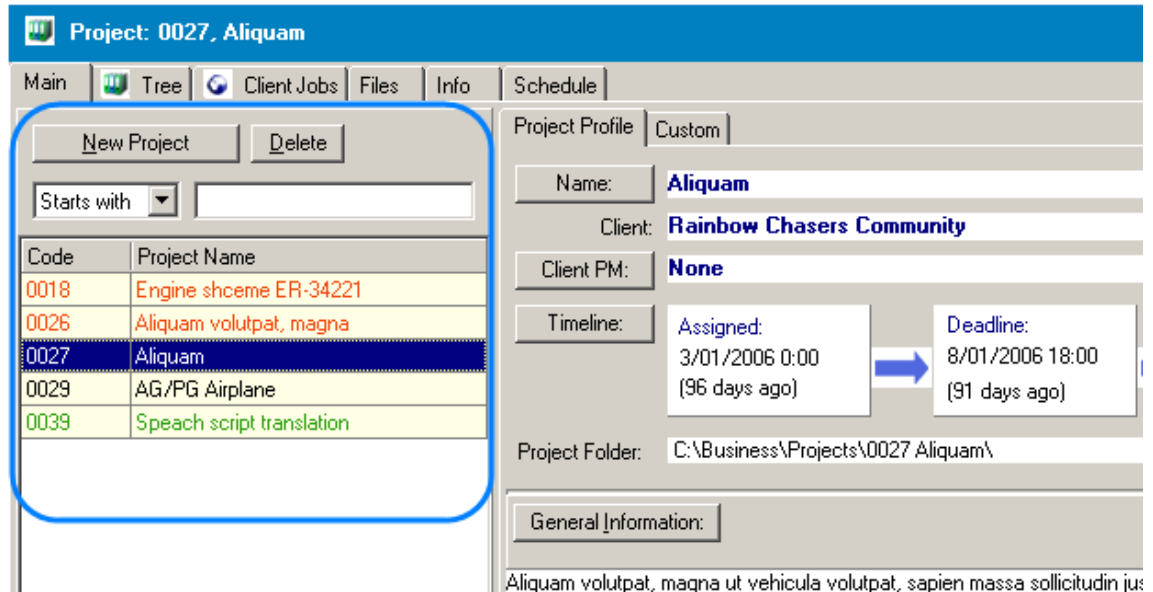
On the **Main** page of the **Project** window you can see the list of all **Projects** from your **TO3000** database, add/delete **Projects** and modify the previously entered information about each **Project**.

To access the **Project Profile** click **Project** icon > **Main** tab or select the corresponding command from the Navigation menu.



Project list

Project list is displayed in the left part of the **Project Main** page.



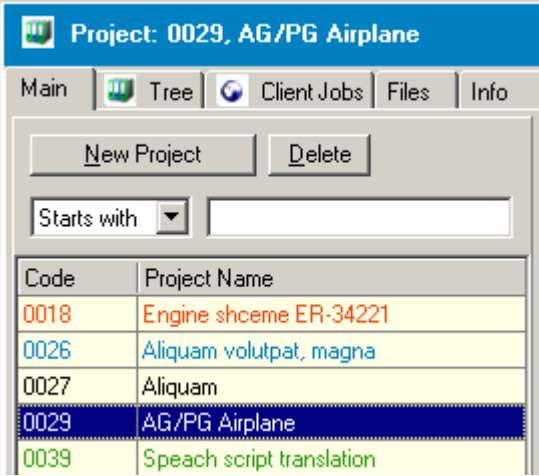
If the **Project** list is very long and the name of the necessary **Project** is not displayed, you may enter the first letters of the **Project** name into **Starts with:** field. Or you can select **Contains** from the drop-down list above the **Project** list and enter the letters the required **Project Name** contains:



You can add the **Project** by clicking **New Project** button. More details...

You may also delete the selected **Project** by clicking **Delete** button. More details...

Records in **Project** list are marked by color:



The screenshot shows the 'Project: 0029, AG/PG Airplane' window. It features a menu bar with 'Main', 'Tree', 'Client Jobs', 'Files', and 'Info'. Below the menu are buttons for 'New Project' and 'Delete', and a 'Starts with' dropdown. A table lists projects with color-coded status indicators:

Code	Project Name
0018	Engine scheme ER-34221
0026	Aliquam volutpat, magna
0027	Aliquam
0029	AG/PG Airplane
0039	Speech script translation

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

See Also:

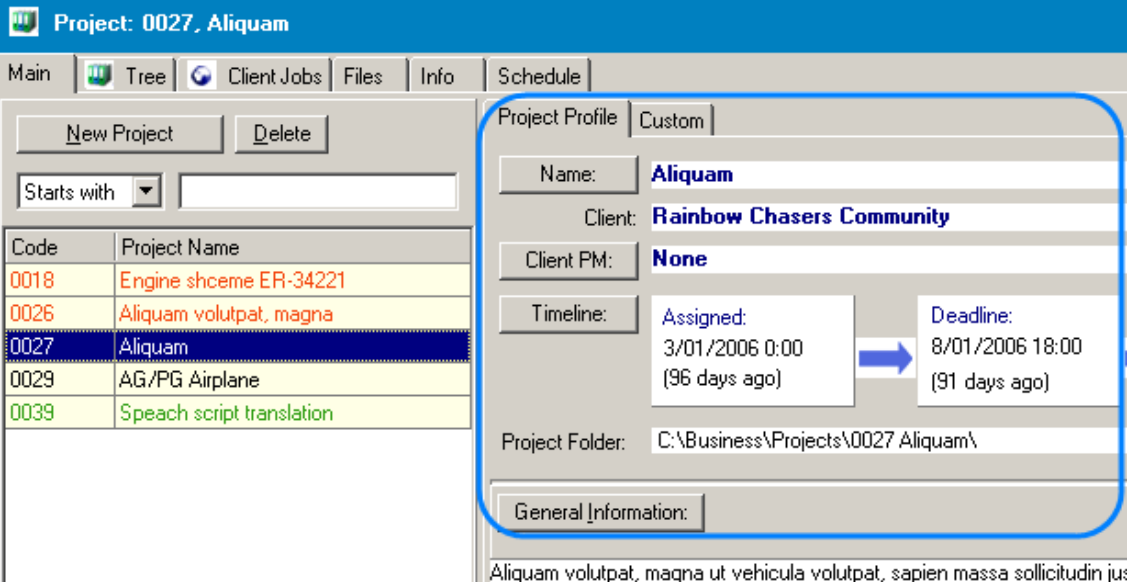
Adding a new Project

Modifying a Project

Local Custom Filter

Project Profile, Custom tabs

In the right part of the **Project Main** page **Project Profile** and **Custom** tabs are located.



The screenshot shows the 'Project: 0027, Aliquam' window. The 'Project Profile' and 'Custom' tabs are active. The 'Project Profile' tab displays the following information:

- Name: **Aliquam**
- Client: **Rainbow Chasers Community**
- Client PM: **None**
- Timeline: Assigned: 3/01/2006 0:00 (96 days ago) → Deadline: 8/01/2006 18:00 (91 days ago)
- Project Folder: C:\Business\Projects\0027 Aliquam\

Below the Project Profile tab is a 'General Information' section with the text: Aliquam volutpat, magna ut vehicula volutpat, sapien massa sollicitudin jus

On the **Project Profile** tab of the **Project Main** page you can change the earlier entered information about the selected **Project**. More details...

Under the **Custom** tab you can enter any other information about the project in the previously created **Custom Fields**. More details...

See Also:

Main page, Project Profile

Modifying a Project

6.2 Creating a new Project

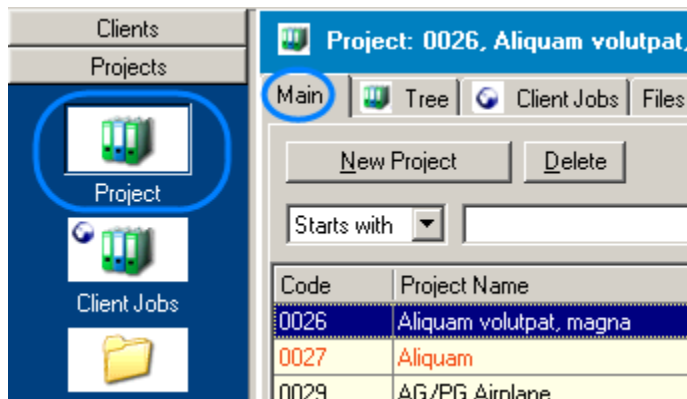
There are two ways to add a new **Project** In Translation Office 3000 V8:

- Create a completely new **Project** record, specifying the **Client**, **Jobs**, timing and other necessary details.
- Turn the existing **Client Quote** into a **Project**. (See Creating a Project based on the Quote for details)

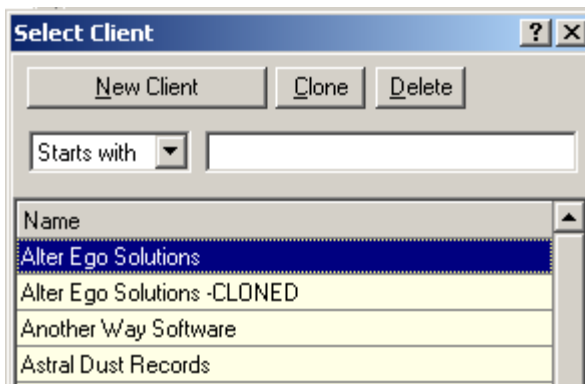
Creating a completely new Project record:

A new **Project** can be added:

From the **Main** page of the **Project** window (you will need to specify the **Client**):



1. Click the **New Project** button.
2. Select the **Client** of the **Project** from the **Clients** list displayed:



To select a **Client** from the list, double-click the **Client** name.

If the **Client** list is very long and the name of the current client is not displayed, you may enter the first letters of the **Client** name into **Starts with:** field. Or you can select **Contains** from the drop-down list above the **Clients** list and enter the letters the required **Client Name** contains:

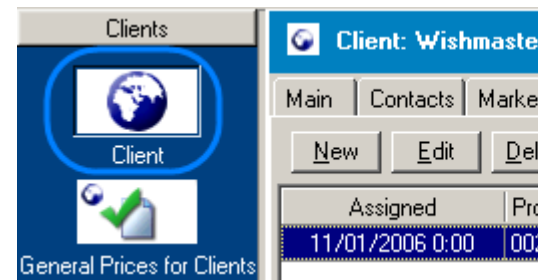


If the **Client** is new, you may add the client by clicking **New Client** button.

See Also: Adding a new Client

3. Fill the fields of the New Project window displayed after the **Client** was selected.

From the **Projects** page of the **Client** window **Client** will be created at once):



1. Click the **New** button.

Note: the **Client** the **Project** will be created on the page of the **Client** window and is displayed in

2. Fill the fields of the New Project window di

After the **Project** was added to the database, it is displayed in the **Project** list on the **Main** page of the **Project** window; here you can change **Project** details on the **Project Profile** tab.

Project details can be also changed in the **Edit Project** window. To open it click **Edit** button from the **Projects** page of the **Client** window. More details...

Client Jobs can be added to the **Project** from the **Client Jobs** page of the **Project** window. More details...

See Also:

Changing Project details

Creating a new Client Job

Quotes to Clients

6.2.1 New Project window

In the **New Project** window you can specify the necessary information about the project when creating a **Project** record, i.e. enter the **Project** name, timeline etc.

New Project

Client: **Alter Ego Solutions** Code: Auto

Client PM: **None**

Project Name: name of the project

Information: optional info about the project

Create Explore You can create and explore folders after Project is entered in database.

Timeline: =Assigned =Deadline =Now

Assigned: 4/05/2006 9:00 (today) → Deadline: 4/05/2006 18:00 (today) → Completed:

RTF Templates will be available after Project is entered in database.

OK Cancel

New Project window opens on **New Project** button click from the **Main** page of the **Projects** window or on the **New** button click from the **Projects** page of the **Client** window.

Translation Office 3000 V8 automatically assigns the unique code for the **Project**.

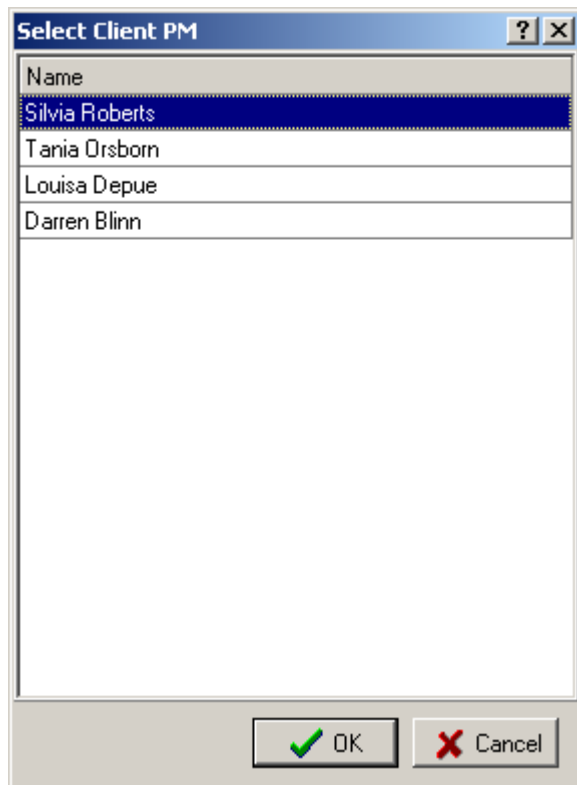
The **Client** of the **Project** is displayed in the upper part of the **New Project** window.

New Project

Client: **Alter Ego Solutions**


Client PM: **None**

Using **Client PM** button you can specify the **Client Project Manager**, in charge for the project, selecting it from the **Select Client PM** dialog:



 **Note:** The list of the **Client Project Managers** can be edited on the **Contacts** page of the **Client** window. More details...

Enter **Project Name** and **Information** about the project into corresponding fields (maximum 70 characters and 390 characters correspondingly):

 **Note:** The limitation for the **Project Name** field is 70 characters, for the **Information** field - 390 characters.

Specify the project timeline using **Assigned** and **Deadline** drop-down fields:

Timeline: =Assigned =Deadline =Now

Assigned: (today) ➔ (today) ➔ Completed:

To specify the **Assigned** date:

Assigned: ➔

Calendar for mai 2006:

l	m	m	j	v	s	d
24	25	26	27	28	29	30
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4

Time:

In the drop-down dialog box you can easily select deadline month, day, and time:

- To select the month, click the right and left arrows near the month name.
- To select the date, click the day number.
- To select the time, click the up and down arrows near the time field. You can also enter the time manually.

Deadline of the project is set in similar way, using **Deadline** drop-down field. If the date of the **Deadline** coincides with the **Assigned** date, you can set it automatically using **=Assigned** button.

When the **Project** is completed, you can specify it selecting **Completed** option and setting the date as described above:

Completed:


Calendar for mai 2006:

l	m	m	j	v	s	d
24	25	26	27	28	29	30
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4

Time:

or using **=Deadline** and **=Now** buttons, to set the completed date equal to the **Deadline** date or to

the current date&time correspondingly.

 **Note:** As a rule **Completed** option is used after the project was created, it is accessed from the Edit Project window.

See Also:

Adding a New Project

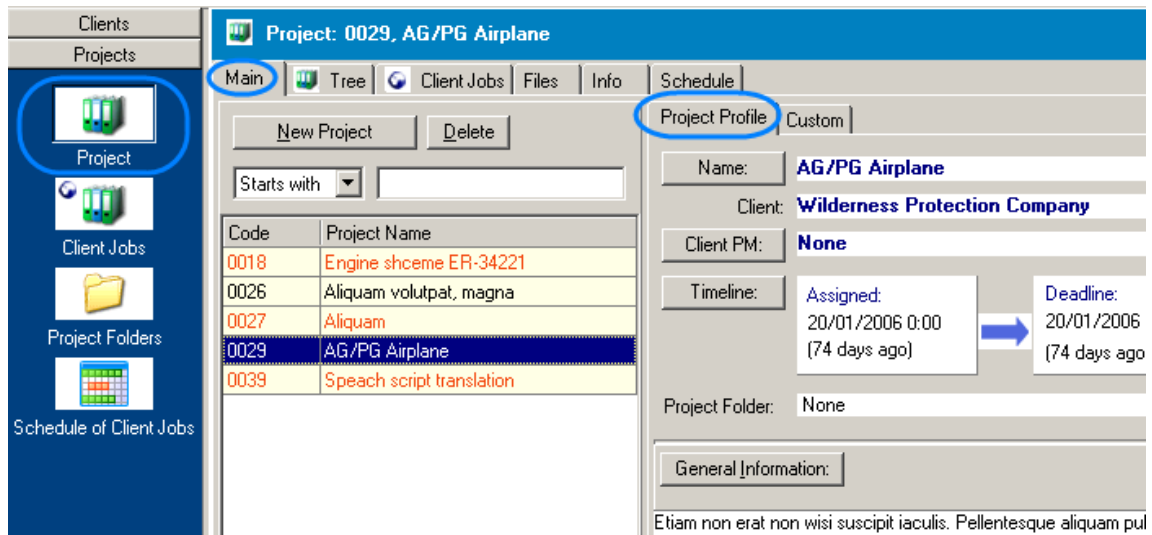
Edit Project window

6.3 Modifying a Project

While working on the project, you may need to change some information about it or to register the completion date when it is completed.

Projects details can be accessed on the **Project Profile** tab of the **Project Main** page or in the Edit Project window displayed on **Edit** button click from the **Projects** page of the **Client** window.

To modify the Project from Project Profile tab:

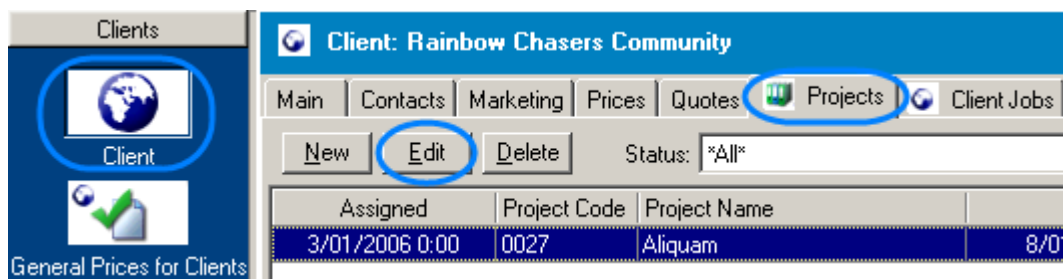


Code	Project Name
0018	Engine shceme ER-34221
0026	Aliquam volutpat, magna
0027	Aliquam
0029	AG/PG Airplane
0039	Speach script translation

1. Switch to the **Main** tab of the **Project** window.
2. Select the **Project** from the **Project** list.
3. Change the **Project** details on the **Project Profile** tab. More details...

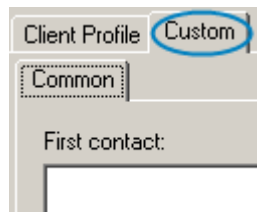
To modify the Project from the Client window:

1. Select the **Client** from the **Client** list on the **Main** page of the **Client** window.
2. Switch to the **Projects** page of the **Client** window.



3. Select the necessary **Project**.
4. Click **Edit** button or double-click the selected **Project** and enter the changes in the **Edit Project** window displayed. More details...

Under the **Custom** tab you can enter any other information about the project in the previously created **Custom Fields**.




You can create **Custom Fields** for storing each type of information and group them on tabs at your will. **Custom Fields** and tabs are created on the **Custom Fields** page of the **Advanced Settings** window .

To delete the Project

To delete the **Project** select it from the list on the **Main** page of the **Project** window or on the **Projects** page of the **Client** window (see the screenshots above), click **Delete** and confirm the deletion in the confirmation dialog box.

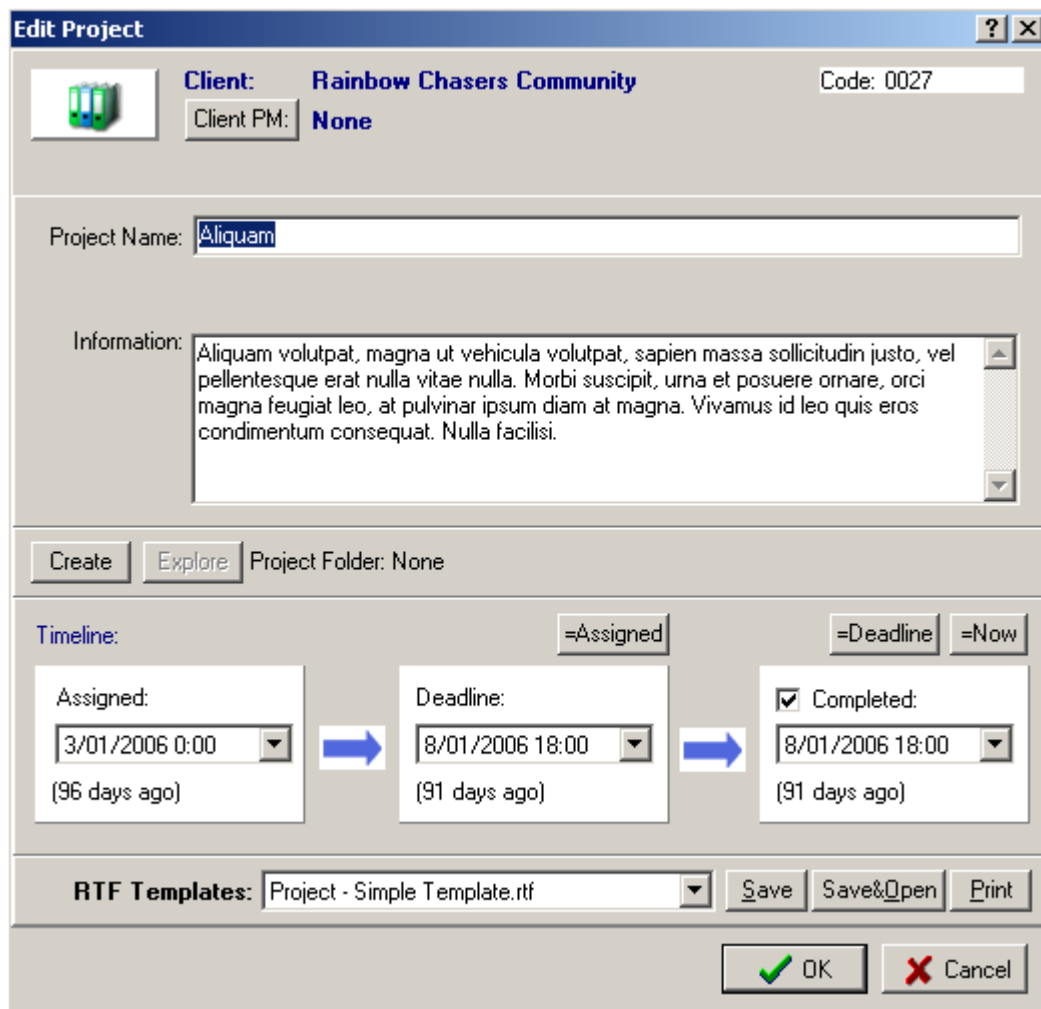
Note: The **Project** cannot be deleted if it contains **Client Jobs**, i.e. you have to delete all **Client Jobs** of the **Project** first.

 **Note:** When you delete a **Project** record with not the last **Code** number the previous **Projects Codes** do not change.

6.3.1 Edit Project window

In the **Edit Project** window you can change the earlier entered information about the project, i.e. the **Project** name, timeline etc. You can also create the separate folder for the **Project** within the system of **TO3000** folders and export the **Project** description to the .RTF format using .RTF templates.

Edit Project window opens on the **Edit** button click or double-clicking the **Project** record from the **Projects** page of the **Client** window or from the Schedule of Projects window.



Edit Project

Client: **Rainbow Chasers Community** Code: 0027
 Client PM: **None**

Project Name: **Aliquam**

Information: Aliquam volutpat, magna ut vehicula volutpat, sapien massa sollicitudin justo, vel pellentesque erat nulla vitae nulla. Morbi suscipit, urna et posuere ornare, orci magna feugiat leo, at pulvinar ipsum diam at magna. Vivamus id leo quis eros condimentum consequat. Nulla facilisi.

Create Explore Project Folder: None

Timeline: =Assigned =Deadline =Now

Assigned: 3/01/2006 0:00 (96 days ago) → Deadline: 8/01/2006 18:00 (91 days ago) → Completed: 8/01/2006 18:00 (91 days ago)


RTF Templates: Project - Simple Template.rtf Save Save&Open Print

OK Cancel

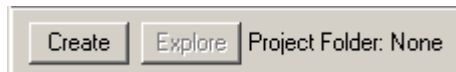
Most of the fields of the **Edit Project** window are the same as in the New Project window. But here you can also select the .RTF template for the **Project**, save, view or print the .RTF file containing the project (Use **RTF Templates** drop-down list and **Save**, **Save&Open** and **Print** buttons):



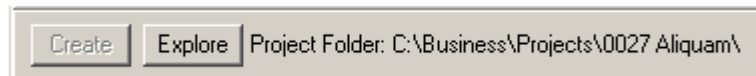
You can also create and explore the separate folder for the **Project**, by default it will be located in the [C:\Business\Projects\](#).

 **Note:** you can change the location of **Business** folder and select which folders are automatically created on the Folders page of the Advanced Settings window.

To create the **Project** folder click **Create** button:



After this you can explore the **Project Folder** using **Explore** button:



See Also: [Navigating TO3000 folders](#)

See Also:

[Modifying a Project](#)

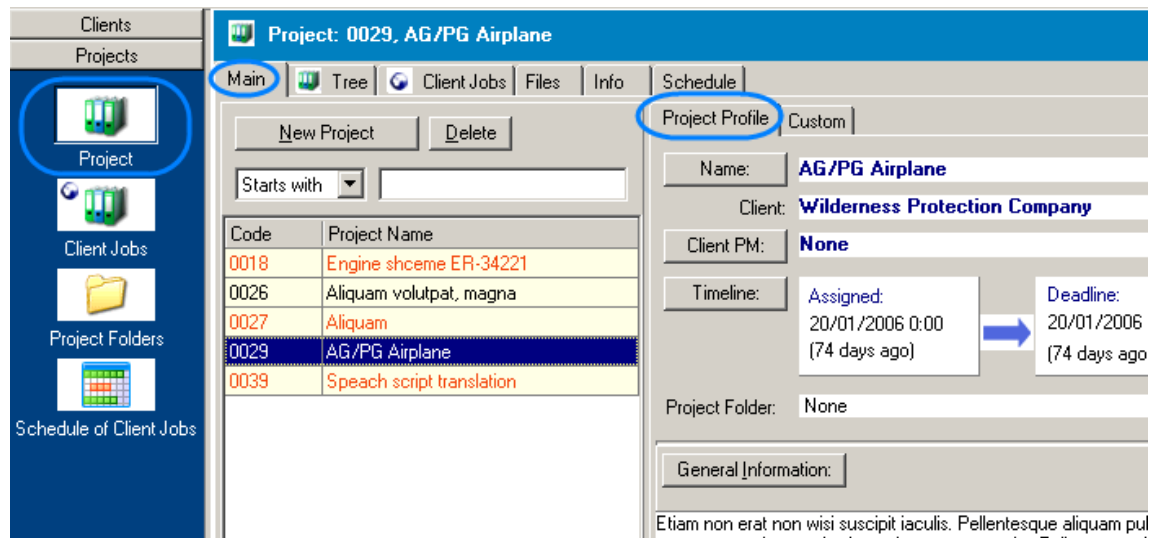
[Main page, Project Profile](#)

[Advanced Settings](#)

6.3.2 Main page, Project Profile

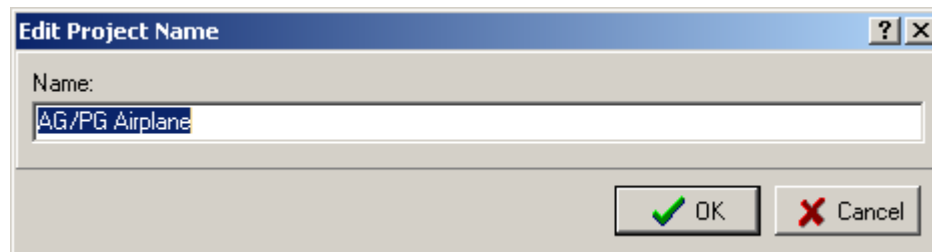
On the **Project Profile** tab of the **Project Main** page you can change the earlier entered information about the selected **Project**.

To access the **Project Profile** click **Project** icon and switch to the **Main** tab or click menu **Navigation > Project > Main**.

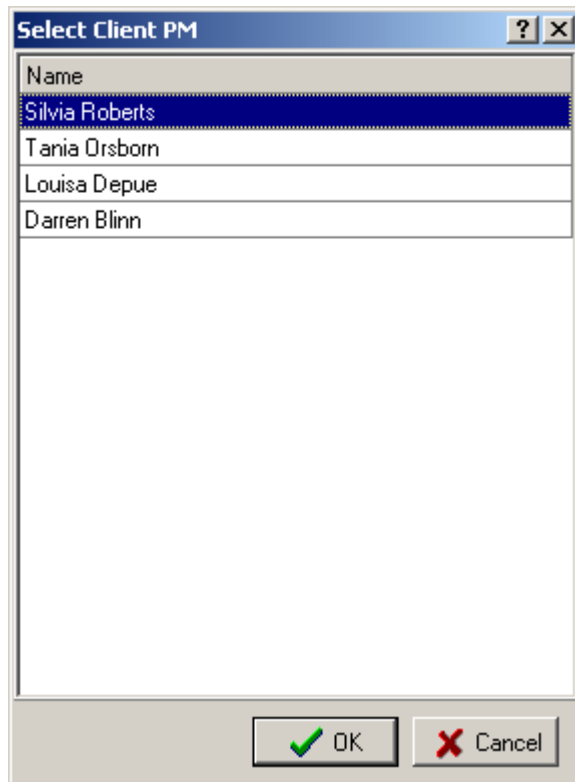


On the **Project Profile** tab you can easily:

- Change **Project** name: click **Name:** button and make the necessary corrections in the **Edit Project Name** window:

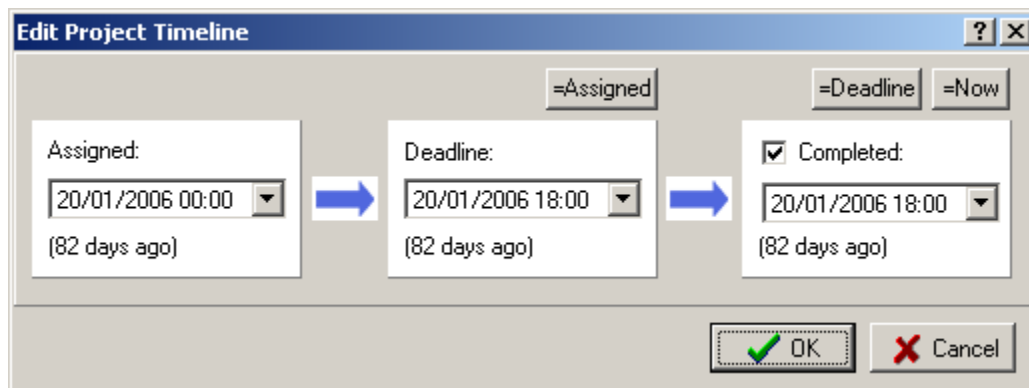


- Change the client project manager: click **Client PM:** button and select the necessary record from the clients contacts list in the **Select Client PM** dialog:

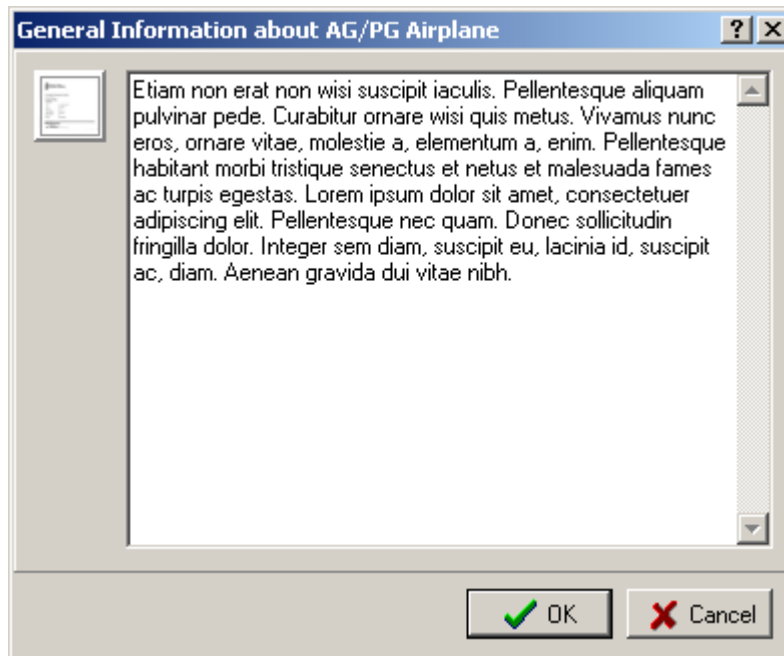


 **Note:** The list of the **Client Project Managers** can be edited on the **Contacts** page of the **Client** window. More details...

- Change the project assignment date, deadline and completion date (if completed): click **Timeline** button and make the necessary changes in the **Edit Project Timeline** window:



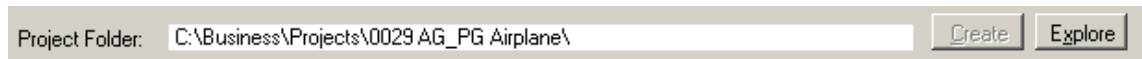
- Change the general information about the project: click **General Information** button and edit the notes in the **General Information about...** dialog:



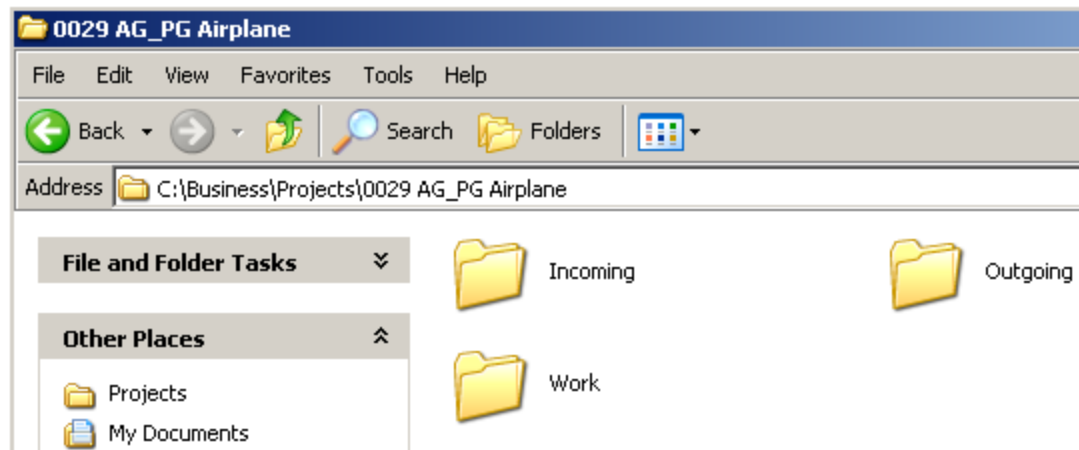
Clients usually send you one or more files related to the project. Thus, you need to create special folder for the **Project** to store these files. To create the **Project** folder click **Create** button near **Project Folder:** field:



When the **Project Folder** has been created, you can open it by clicking **Explore** button:



After clicking **Explore** button the project folder opens in Windows Explorer:



As you can see, the created project folder contains three subfolders:

- **Incoming** – for the files received from the client;
- **Work** – for the files created during the work on the project;
- **Outgoing** – for the files to be sent to the client.

See Also:

Modifying a Project

Edit Project window

7 Quotes to Clients

In [Translation Office 3000 V8](#) you have a possibility to issue quotes to clients with a list of draft jobs and their estimated cost (if the quote is accepted, you can turn it into **Project** with one click).

You can create and manage **Quotes** to a selected **Client** on the **Quotes** page of the **Client** window and you can view and edit all **Quotes** (to all **Clients**) in the **Quotes to Clients** window.

The general view of the **Quotes** page of the **Client** window (displaying the quotes to the selected client):

Code	Name	Sent	Assigned	Deadline	Status	Total
Q-ALTEG0	Nulla quam.	1/20/2005	1/4/2005 1	1/4/2005 6	Unknown	
Q-ALTEG0	Suspendisse	1/20/2005	1/20/2005	1/20/2005	Unknown	

Name	Group of Serv	Service	Unit	Price	Volume	Pricing	Total
Suspendisse	DTP Tasks	DTP in Adobe	pages	1800 €	0,00	0	per unit 0,00

Quotes page is divided into two parts.

The list of existing **Quotes** is displayed in the left part of the window. When you select a **Quote** from this list the **Draft Client Jobs** it contains are displayed in the right part of the window.

Quotes

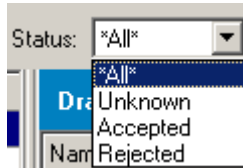
New Quote button is used for adding a new **Quote** to the database. More details...

Edit button is used for modifying the **Quote**. More details...

Delete button is used for deleting the **Quotes** from the database. After clicking **Delete** you will need to confirm the deletion.

When the **Quote** is accepted you can create a **Project** based on this **Quote** using **Create Project Based on Quote** button. More details...

Using the **Status** drop-down list you can select to display only **Quotes** with particular status:



Draft Client Jobs

The draft client jobs related part of the **Quotes** window contains the list of the **Draft Client Jobs** of the **Quote** selected and three control buttons.

Use **New** button to add a new **Draft Client Job** to the selected **Quote**. More details...

Use **Edit** button to modify the **Draft Client Job**. More details...

Use **Delete** button to delete the record from the database (you will need to confirm the deletion).

See Also:

Creating a Quote.

View all Quotes.

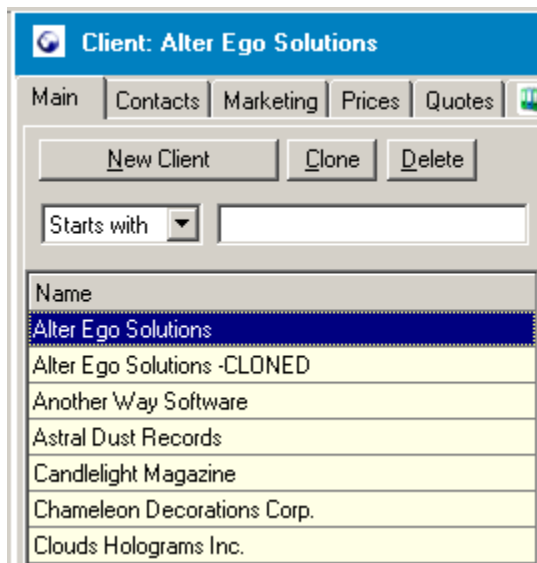
Create a Project based on a Quote.

7.1 Creating a new Quote

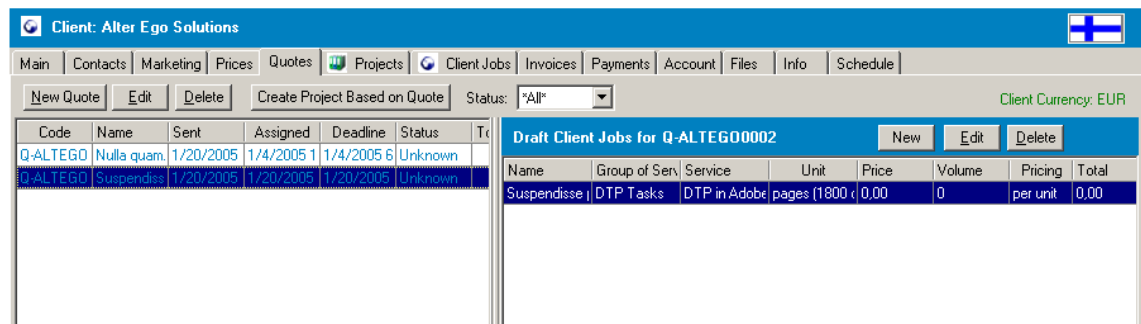
Quotes to clients contain draft client jobs and their estimated cost.

To create a new Quote:

1. On the **Main** page of the **Client** window select the **Client** the **Quote** will be addressed to:



2. Switch to the **Quotes** tab of the **Client** window.



3. Click **New Quote** button.

4. Enter the necessary information (client jobs and their details) to the New Quote window.

The newly created quote record will appear in the list of **Quotes** in the left part of the **Quotes** page.

See Also:

Modifying a Quote

View all Quotes (Quotes to Clients window)

7.1.1 New Client Quote window

In the **New Client Quote** window you can specify the necessary information when creating a new quote (set the client's project manager, add presumable client jobs, set draft timeline, data sent, enter the request for the quote and answer, create folder for this quote, etc.).

New Client Quote window opens on **New Quote** button click from the Quote page of the Client window.

New Client Quote

Client: **Alter Ego Solutions** Date Sent: 19/04/2006
 Client PM: **None** Code: Auto
 Status: Unknown

Draft Project:

Client Jobs: Request for Quote | Answer
 New Edit Delete

Name	Group of Services	Service	Unit	Volume	Price	Pricing	Total

Create Explore

You can create and explore folders after Quote is entered in database.

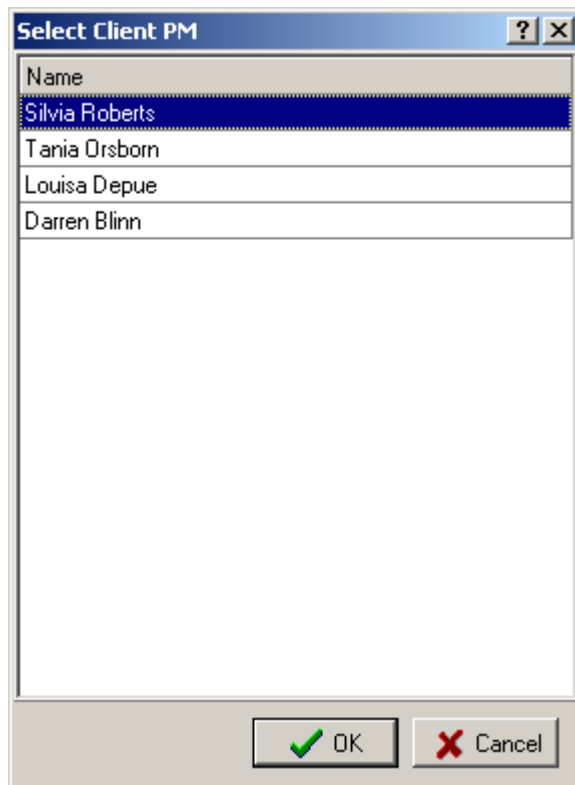
Draft Timeline: =Assigned **Total: 0.00**
 Client Currency: EUR

Assigned: 19/04/2006 09:00 (today)
 Deadline: 19/04/2006 18:00 (today)


RTF Templates will be available after Quote is entered in database.

OK Cancel

- To set the client project manager click **Client PM:**. The **Select Client PM** window opens displaying the list of the projects managers of the client:



Select the project manager and click **OK**.

 **Note:** the list of client project managers can be modified on the Contacts page of the Client window.

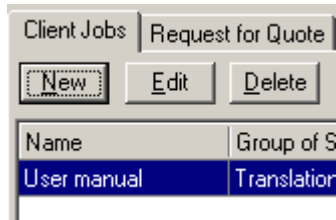
- Enter the draft name of the future project in the **Draft Project:** text field.

Draft Project:

- On the **Client Jobs** tab click **New** button and fill the fields of the New Draft Client Job window to add a new draft client job:

Client Jobs	Request for Quote	Answer
New	Edit	Delete
Name	Group of Services	Ser

After the **Client Jobs** are added you can change their details or delete them using **Edit** and **Delete** buttons correspondingly:



See also: Edit Draft Client Job window.

- On the **Request for Client Quote** tab you enter the text of the request for the quote.
- On the **Answer** tab you can enter the text of the client's reply.
- Specify the draft timeline using the **Assigned** and **Deadline** drop-down calendars:



 **Note:** Click **=Assigned** to set **Deadline** date equal to **Assigned** date.

Click **OK** to add the **Quote** to the database or click **Cancel** to discard.

After the quote is added to the database, you will have the possibility to create a separate folder for it and export the **Quote** to .RTF format using the .RTF templates (these options are available from the **Edit Client Quote** window).

See Also:

Creating a Quote

Modifying a Quote

View all Quotes

Templates

Creating a Project based on the Quote

7.1.2 New Draft Client Job window

In the **New Draft Client Job** window you can enter the details of the draft client job you add to the client quote.

New Draft Client Job window opens on **New** button click from the Quotes page of the **Client** window or from the Quotes to Clients window.

- Enter the name of the draft client job you create in the **Name** text field.
- Select the **Group of Service** the new job relates to from the **Group:** drop-down list.
- Select the **Service** the new job corresponds to from the **Service:** drop-down list.

Note: The lists of **Services** and **Groups of Services** can be modified in the Business Settings.

- Select the units from the drop-down list on the right from the **Volume** text box.

Note: The list of volume units can be modified in the Business Settings

- Enter the job volume to the **Volume:** text field manually or click **AnyCount/CATCount** buttons to use the built-in **AnyCount** (text count tool) or **CATCount** (a tool for using CAT Scheme).
See Also: Built-in AnyCount
See Also: Built-in CATCount
- Enter the job price manually in the yellow text box and select the pricing principle from the drop-down list:

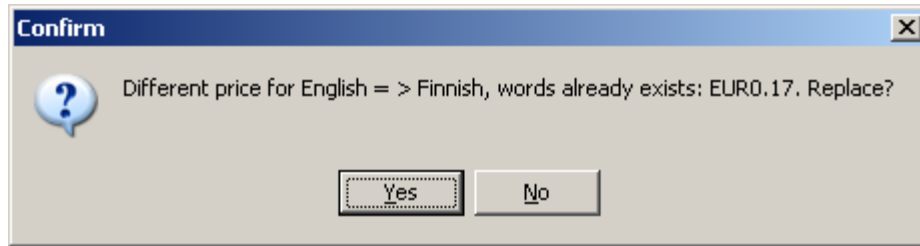
or copy the price from the General Prices list.

You can also automatically add the manually entered price to the **General Prices** list using button:

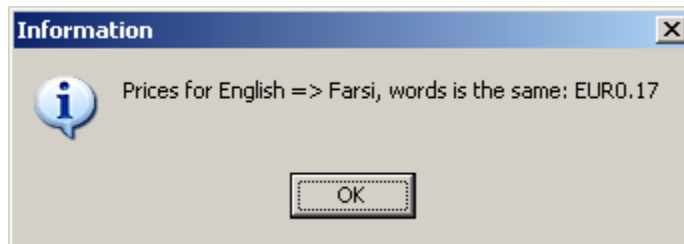
enter the price and click . The new price record will be added to **General Prices** list at once.

If the price for this service already exists you will need to confirm the price replacing in the


confirmation window:



If the existing price is the same as the one you want to enter, you will see the notification pop-up window:



- Click **OK** in the **New Draft Client Job** window to add the new draft job to the database or click **Cancel** to close the window and cancel adding the job.

 **Note:** The **Client Currency** is displayed in green letters in bottom right corner of the **New Draft Client Job** window.

See Also:

Creating a Quote

Modifying a Quote

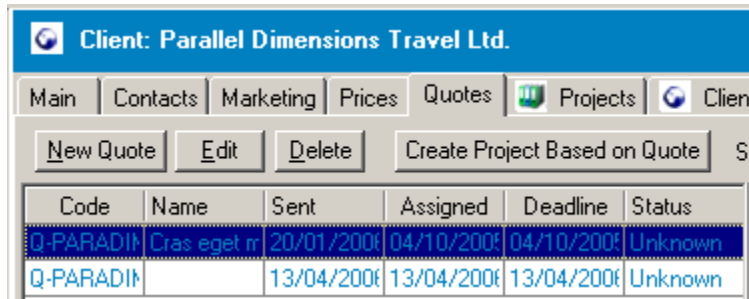
7.2 Modifying a Quote

You may need to adjust some information on the **Quote** or change its status having received the feedback from the client.

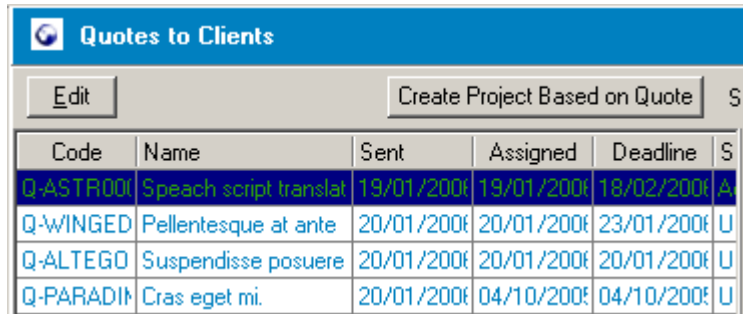
The **Quote** can be modified from the Quotes page of Client window (where the quotes to the particular client are displayed) or from the Quotes to Clients window (where all quotes from the database are displayed).

To modify the Quote:

1. Open Quotes page of Client window or Quotes to Clients window and select the necessary **Quote** from the list.




or



2. Click **Edit** button in the left part of the window or double-click the selected **Quote**.
3. Make the necessary changes in the **Edit Client Quote** window. More details...

To delete a Quote

To delete a **Quote** select it from the list on the **Quotes** page of the **Client** window (see the first screenshot above) click **Delete** button and confirm the deletion in the confirmation dialog box.

 **Note:** When you delete a **Quote** record with not the last **Code** number the previous **Quote Codes** do not change.

See Also:

Creating a Quote

View all Quotes

7.2.1 Edit Client Quote window

In the **Edit Client Quote** window you can modify the **Quote** details: change its status, draft jobs details etc.

Edit Client Quote window opens on **Edit** button click (or double-clicking the **Quote**) from the Quotes page of Client window (where the quotes to the particular client are displayed) or from the Quotes to Clients window (where all quotes from the database are displayed).

Edit Client Quote

Client: **Astral Dust Records** Date Sent: 19/01/2006
 Client PM: **None** Code: Q-ASTR0001
 Status: Accepted

Draft Project: Speech script translation

Client Jobs: Request for Quote* Answer

New Edit Delete

Name	Group of Services	Service	Unit	Volume	Price	Pricing	Total
Speech script transla	Editing	Proofreading	hours	8	38.00	per unit	304.00

Create Explore Folder: None

Draft Timeline: =Assigned **Total: 304.00**
 Client Currency: EUR

Assigned: 19/01/2006 00:00 (139 days ago)
 Deadline: 18/02/2006 18:00 (109 days ago)

RTF Templates: MultiQuote to Client - Template - English.rtf Save Save&Open Print

Help OK Cancel

Most of the fields of the **Edit Client Quote** dialog box are the same as in the New Client Quote window. But here you can also select the .RTF template for the quote, save, view or print the .RTF file containing the quote (Use **RTF Templates** drop-down list and **Save**, **Save&Open** and **Print** buttons).

 **Note:** You can change quote status (**Unknown**\Accepted\Rejected) and the quote will be marked with different color in the list: blue\green\red correspondingly:

Code	Name	Sent	Assigned	Deadline	Status	Total	Total (B)
Q-ALTEGO	Nulla quam.	1/20/2005	1/4/2005 1	1/4/2005 6	Unknown	200,00	200,0
Q-ALTEGO	Naamee	1/31/2006	1/31/2006	1/31/2006	Accepted	0,00	0,0
Q-ALTEGO	Suspendiss	1/20/2005	1/20/2005	1/20/2005	Rejected	0,00	0,0

(the colors can be changed in the Personal Settings).

See Also:

Creating a Project based on the Quote

Modifying a Quote

7.2.2 Edit Draft Client Job window

In the **Edit Draft Client Job** window you can change the details (price, volume etc.) of the draft job added to client quote.

Edit Draft Client Job window opens on the **Edit** button click (or double-clicking the **Draft Job** record) from the Quotes page of Client window (where the quotes to the particular client are displayed) or from the Quotes to Clients window (where all quotes from the database are displayed):

Assigned	Deadline	Status
04/10/2006	04/10/2006	Unknown
13/04/2006	13/04/2006	Unknown

Draft Client Jobs for Q-PARADIM0001							
Name	Group of Serv	Service	Unit	Price	Volume	Pricing	Total
Cras eget mi.	Consulting	Multilingual Co	hours	18.00	23	per unit	414.00

or

Code	Name	Sent	Assigned	Deadline	S
Q-ASTR000	Speech script translate	19/01/2006	19/01/2006	19/02/2006	U
Q-WINGED	Pellentesque at ante	20/01/2006	20/01/2006	23/01/2006	U
Q-ALTEGO	Suspendisse posuere	20/01/2006	20/01/2006	20/01/2006	U
Q-PARADIM	Cras eget mi.	20/01/2006	04/10/2006	04/10/2006	U
Q-WINGED	www.translation3000	20/01/2006	20/01/2006	20/01/2006	U

Draft Client Jobs for Q-ASTR0001							
Name	Group of Serv	Service	Unit	Price	Volume	Pricing	Total
Speech script	Editing	Proofreading	hours	38	8	per unit	304

All fields of the **Edit Draft Client Job** window are the same as in the New Draft Client Job window.

See Also:

Modifying a Quote

7.3 View all Quotes

In the **Quotes to Clients** window you can view and modify all **Quotes** stored in the database.

The general view of the **Quotes to Clients** window (displaying all quotes to all clients):

Code	Name	Sent	Assigned	Deadline	S
Q-ASTR000	Speech script translate	19/01/2006	19/01/2006	19/02/2006	U
Q-WINGED	Pellentesque at ante	20/01/2006	20/01/2006	23/01/2006	U
Q-ALTEGO	Suspendisse posuere	20/01/2006	20/01/2006	20/01/2006	U
Q-PARADIM	Cras eget mi.	20/01/2006	04/10/2006	04/10/2006	U
Q-WINGED	www.translation3000	20/01/2006	20/01/2006	20/01/2006	U
Q-EDD000	Field mis-match (Desc	21/01/2006	21/01/2006	21/01/2006	U
Q-WISHEN	Power Redirection Sy	21/01/2006	21/01/2006	21/01/2006	U
Q-WINGED		26/01/2006	26/01/2006	26/01/2006	U
Q-PARADIM		13/04/2006	13/04/2006	13/04/2006	U

Draft Client Jobs for Q-ASTR0001							
Name	Group of Serv	Service	Unit	Price	Volume	Pricing	Total
Speech script	Editing	Proofreading	hours	38.00	8	per unit	304.00

It is very similar to the Quotes page of the Client window described above. The only essential difference is that **Quotes to Clients** window displays all **Quotes**, not only the **Quotes** to the

selected **Client**. And also **Quotes** cannot be created or deleted from this window.

See Also:

Creating a Quote

Modifying a Quote

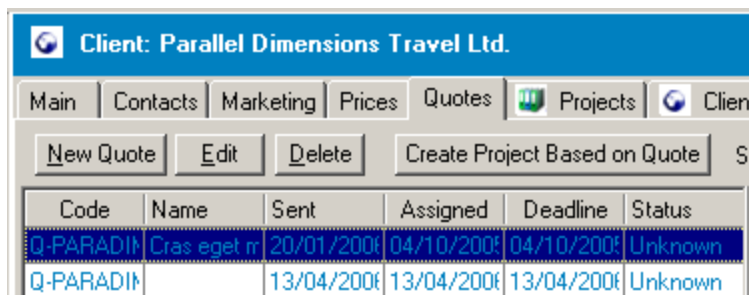
7.4 Creating a Project based on the Quote

One of the great benefits of the **Translation Office 3000 V8** is a possibility to create a project based on the quote with one click. I.e. when the client accept you quote, you do not need to create a similar project, enter all jobs details once again - you just need to click **Create Project based on Quote** button and the project is ready!

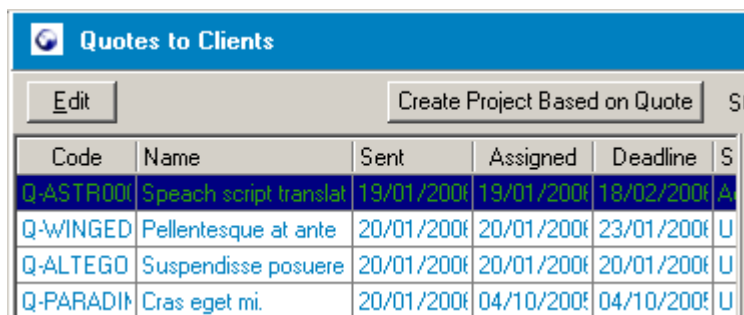
Create Project based on Quote button is available on both quotes displaying pages: the Quotes page of Client window (where the quotes to the particular client are displayed) or the Quotes to Clients window (where all quotes from the database are displayed).

To create a Project based on a selected Quote:

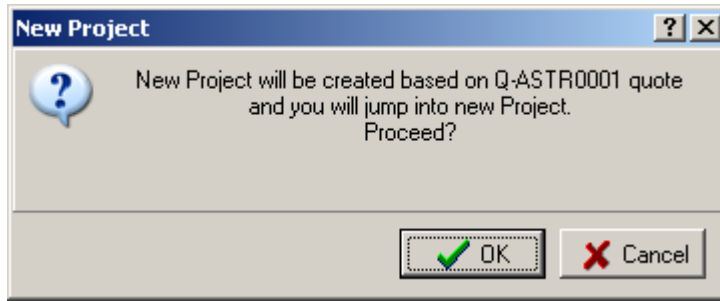
1. Switch to the Quotes page of Client window (where the quotes to the particular client are displayed) or the Quotes to Clients window (where all quotes from the database are displayed).



or



2. Select the necessary **Quote** from the list and click **Create Project based on Quote** button.
3. Confirm the creation of the **Project**:



The new **Project** will be added to the database and **Main** page of **Project** window will open automatically displaying the details of the newly added **Project**.

See Also:

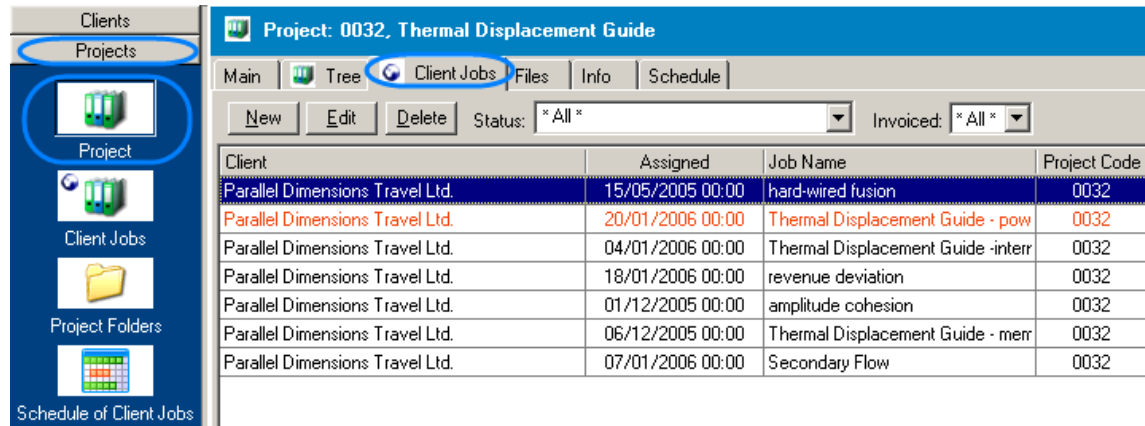
Modifying a Project

8 Client Jobs

8.1 Project Client Jobs page

On the **Client Jobs** page of the **Project** window you can view and manage (create/edit/delete) **Client Jobs** records of the selected **Project**.

The general view of the **Project Client Jobs** page:

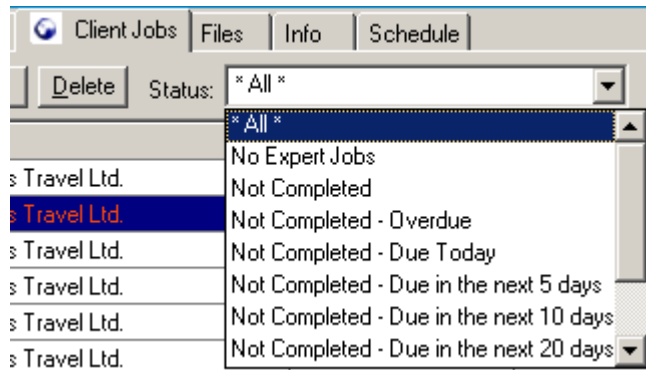


To open the **Client Jobs** page of the **Project** window click the **Project** icon in the **Navigation** panel on the left and then switch to the **Client Jobs** tab or select the necessary commands from the Navigation menu.

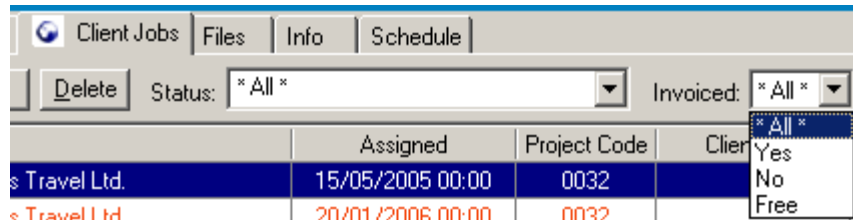
On the **Client Jobs** page of the **Project** window you see the list of the **Client Jobs** from the scope of the particular **Project** (**Project** is selected on the **Main** page, its name and number are displayed in the window header. For example on the screenshot above the **Project** code is 0032 and its name is "Thermal Displacement Guide").

Right-clicking on the list you can select to see the selected record in a vertical view (thus all fields will be visible, no need to scroll), select what columns to display and change their order. More details...

Use **Status** drop-down list to select and view only **Client Jobs** with certain status:



Using **Invoiced** drop-down list to select and view only **Client Jobs** included/not included to any **Invoice** or free **Jobs**:



Use **New**, **Edit** and **Delete** buttons to create, edit and delete **Client Jobs**.

See Also:


Creating a new Invoice

Changing Invoice details

Deleting Invoices. Voided Invoices.

In the bottom right part of the **Client Jobs** page of the **Project** window there is **Calculate Totals** button. Click it to see the total cost of all **Client Jobs** currently displayed:



 **Note:** The total number is calculated for the **Jobs** displayed, not all **Jobs** for the selected **Project**. I.e. if you selected to see only **Completed Jobs** (using **Status** drop-down list), the total cost of the **Completed Jobs** only will be calculated.

See Also:

Creating a new Client Job

Modifying a Client Job

Deleting a Client Job record

Project Tree page

8.1.1 Project Tree page

On the **Tree** page of the **Project** window you can see the tree-structure of the **Client Jobs** of the selected **Project** and create/edit/delete these **Client Jobs**.

To open the **Tree** page of the **Project** window click **Project** icon from the **Navigation** panel and then click **Tree** tab or select the correspondent commands from the **Navigation** menu.

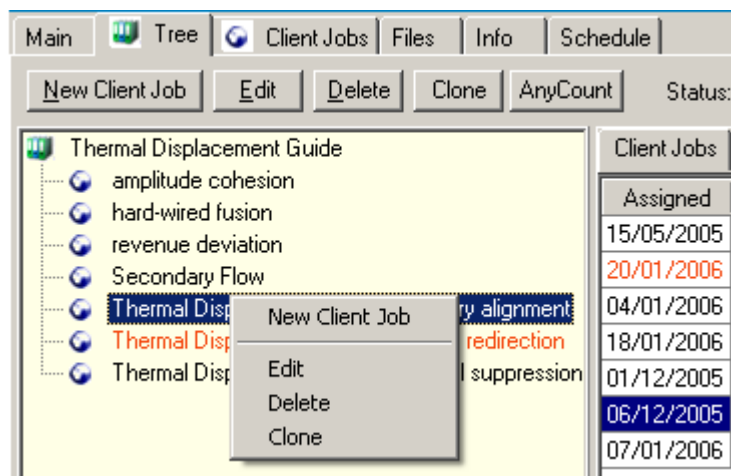
The general view of the **Project Tree** page:

Assigned	Job Code	Job Name	Service	Units	Volume	Job Total (B)	Deadline
15/05/2005	J-PARADIM	hard-wired fusion	Proofreading	hours	25	288.75	15/05/2005 18
20/01/2006	J-PARADIM	Thermal Displacen	English => Swedish	hours	23	407.33	20/01/2006 18
04/01/2006	J-PARADIM	Thermal Displacen	English => Swedish	words	3000	138.60	04/01/2006 18
18/01/2006	J-PARADIM	revenue deviation	Proofreading	pages (1800	45	693.00	19/01/2006 18
01/12/2005	J-PARADIM	amplitude cohesioi	Proofreading	characters (w	3777	5.39	12/12/2005 18
06/12/2005	J-PARADIM	Thermal Displacen	DTP check	hours	56	1940.40	11/12/2005 18
07/01/2006	J-PARADIM	Secondary Flow	Multilingual Copywrit	hours	34	837.76	15/01/2006 18

As you can see, **Tree** page consists of the following parts:

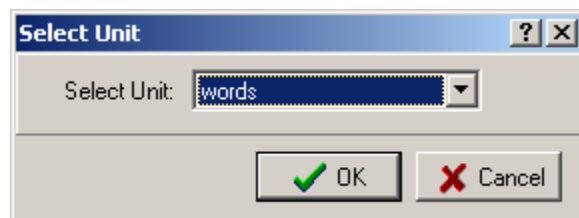
- Tree section with yellow background represents the structure of the **Project**.
- **Client Jobs** – jobs your company has to do for the client.

You can create a new **Client Job**, edit or delete the existing **Jobs** of the **Project** using the correspondent buttons or right-clicking on the tree structure and selecting the correspondent command:



Click **AnyCount** button to call built-in word count tool, **AnyCount 5.0** and automatically insert the count results to the **New Client Job** window.

After the **AnyCount** button click you will need to specify the count units in the **Select Unit** dialog, using the drop-down list:



After you click **OK** in the **Select Unit** window, you need to specify the file to be counted. After the **AnyCount** engine runs, the New Client Job window opens and count results are automatically pasted to its **Volume** field.

See Also: AnyCount

In the right part of the **Project Tree** page you can see the list of the **Client Jobs** and its properties. This **Client Jobs** list and drop-down lists above it are absolutely similar to the **Client Jobs** page content. More details...

See Also:

Creating a new Client Job

Modifying a Client Job

Deleting a Client Job record

Project Client Jobs page

8.2 Client Jobs window

On the **Client Jobs** window you view and edit the list of all **Client Jobs** from your TO3000 database.

To open the **Client Jobs** window click **Client Jobs** icon from the **Projects** part of the **Navigation** panel or click menu **Navigation > Client Jobs**.

The general view of the **Client Jobs** window:

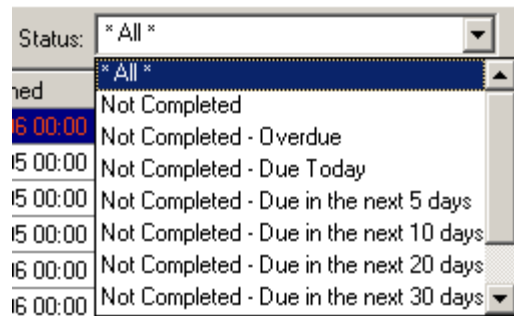
Client Jobs					
Edit		Status: * All *	Invoiced: * All *		
Client	Assigned	Job Name	Project Code	Client Ref.	Deadline
Winged Motors Co	19/01/2006 00:00	Engine scheme ER-34221	0018		04/03/2006
Parallel Dimensions	07/05/2005 00:00	Veni Vidi Vici	0019		03/08/2005
Parallel Dimensions	06/04/2005 00:00	Nam tempus	0019		06/04/2005
Wishmaster Guild E	02/12/2005 00:00	Lorem Ipsum 1st part	0021		02/12/2005
Pocket Moon Souv	19/01/2006 00:00	Proin eget velit ac	0022		19/01/2006
Forever Reflection	14/01/2006 00:00	Morbi accumsan	0023		14/01/2006
Snowmaker Corpor	01/09/2005 00:00	Lorem ipsum dolor sit amet	0024		23/09/2005
Snowmaker Corpor	03/01/2006 00:00	Lorem ipsum II	0024		09/01/2006
Winged Motors Co	16/08/2005 00:00	LS Drive - 1305m - English > Swedi	0025		20/08/2005
Winged Motors Co	05/08/2005 00:00	LS Drive - 1305m Spanish English	0025		20/08/2005

 **Note:** Your **Base Currency** is displayed in the upper right corner of the **Client Jobs** window.

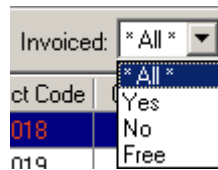
Right-clicking on the list and using the menu displayed you can select to see the selected record in a vertical view (thus all fields will be visible, no need to scroll), specify what columns to display and change their order. More details...

Double-click any record to open the Edit Client Job window and change the **Job** details (you can either select the **Client Job** and click **Edit** button).

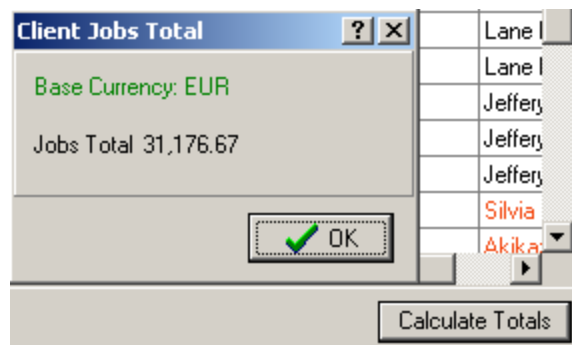
You can view all **Jobs** or select only completed/due today/overdue/etc. **Jobs** to be displayed. Use **Status** drop-down menu to select the condition for displaying:



Similarly you can view only invoiced/not invoiced/free **Jobs** using **Invoiced** drop-down list:



Finally, on the **Client Jobs** window you can also see the total figures for all **Jobs**. Simply click the **Calculate Totals** button in the bottom right corner of the **Client Jobs** window. In the pop-up **Client Jobs Total** window displayed, you will see the **Jobs Total** number. Click **OK** to close the box.



Note: The total numbers are calculated only for the records displayed. I.e. if the Global Date Filter is switched on, the total numbers are calculated only for the records fitting the filter condition (only such records are displayed if the filter is switched on).

See Also:

Creating a new Client Job

Modifying a Client Job

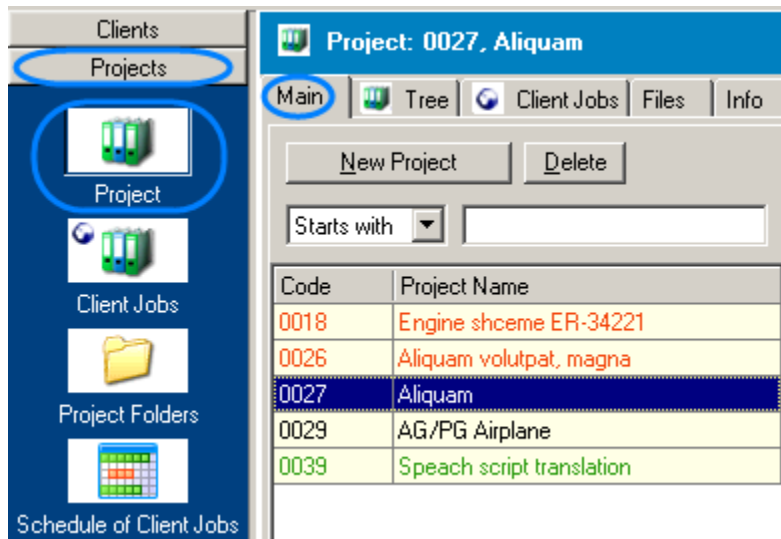
Deleting a Client Job record

8.3 Creating a new Client Job

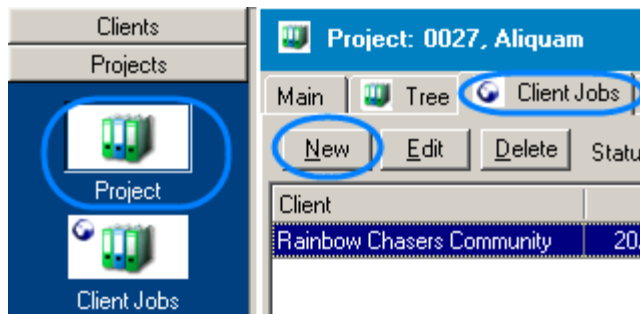
In Translation Office 3000 V8 **Client Jobs** can be added only within the scope of a particular **Project**.

To create a new Client Job:

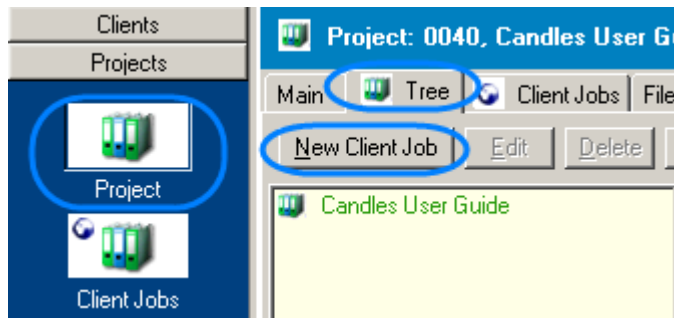
1. Switch to the **Main** page of the **Project** window and select the **Project** the **Client Job** refers to:



2. Switch to the **Client Jobs** page of the **Projects** window and click **New** button:



 **Note:** You can also create a new **Client Job** record from the **Tree** page of the **Project** window.



3. Enter the details of the **Client Job** in the New Client Job window displayed.

See Also:

Modifying a Client Job

Project Client Jobs page

Creating a new Project

8.3.1 New Client Job window

In the **New Client Job** window you can enter the details of the job (name, group of service, volume, price etc.), when creating a new **Client Job** record. You can call built-in **AnyCount** and **CATCount** tools from this window.

The **New Client Job** window opens on **New** button click from the **Client Jobs** page of the **Project** window.



The general view of the **New Client Job** window:

New Client Job

Client: **Candlelight Magazine** Code: Auto
 Project: **0040, Candles User Guide** Client Ref.:
 Client PM: **None** Client PO:

Details | Instructions | Work Notes

Name:

Group:

Service:

Volume: words

Price: per unit

Total: 0,00 Client Currency: USD
 1 USD = 0,77 EUR

Project Folder:

Timeline

Assigned: (today) → (in 3 days) → Completed:

RTF Templates will be available after Job is entered in database.

Entering Job Details to the New Client Job window

In **New Client Job** window you can:

- Select the **Client** contact person (project manager) for the **Job**: click **Client PM** button and select the contact from the **Select Client PM** window. By default it is set "None"

Client PM: **None**

- Enter **Client Ref.** number, **Client PO** number

Client Ref.:

Client PO:

- Enter the name of the **Client Job**:

Name:

By default it corresponds to the name of the **Project**

- Using drop-down list, select **Group** of services (e.g. translation):

Group: Translation

Service: -None-
Consulting
DTP Tasks

Volume: Editing
Other

Price: Testing
Translation

- Using drop-down list, select **Service** (e.g. English=>Finnish):

Service: English => Finnish

Volume: English = Spanish
English => Dutch
English => Farsi

Price: English => French

- Using **Price** text field and the correspondent drop-down list you can set the price of the **Job**. It can be either "per unit" price, flat fee or the **Job** can be done for free.

Clicking you can copy the price from the **Prices** for the current **Client** (i.e. from the Prices page of the Client window for the current **Client**). And vice versa, you can copy the price you have entered to the **Price** list of the current **Client** clicking .


Price: per unit

Total: 0.00

per unit
flat fee
free

- Select **Job** volume units (e.g. words) and enter the volume (e.g. 23000) into **Volume** field. Use **AnyCount** button to count units in the necessary file by built-in **AnyCount 5.0** or click **CATCount** to use CAT scheme. The result is automatically entered into the **Volume** field.

Volume: words

 **Note:** If you use **CATCount**, new tab, **CATCount Notes**, appears on the **New Client Job** window containing table with **CATCount** scheme. If you use **AnyCount** button the **AnyCount Notes*** tab appear containing detailed count results.

See Also: AnyCount
See Also: CatCount

- Enter the **Price** value and type (e.g. 0.15 **per unit**, 3450 **flat fee** or **free**):

Price:

(the job price will be calculated by multiplying unit price per number of units)

Price:

(the job price will is entered directly)

Price:

(the job is free of charge)

The total price of the job (e.g. 3450.00) will appear in the **Total** field below:

Volume:

Price:

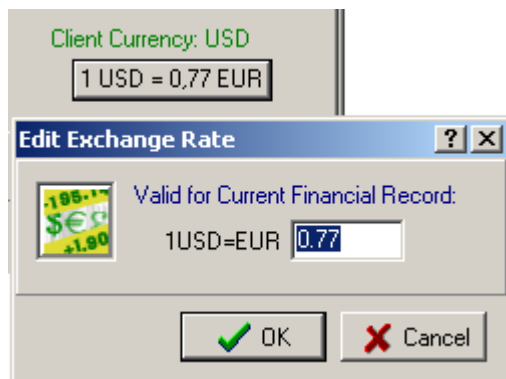
Total: 3 450,00

- Create the **Project** folder or open the **Project** folder if it was already created using Create/Explore buttons:

Project Folder: C:\Business\Projects\0040 Candles User Guide\

You can copy the files received from the client to the **Incoming** subfolder of the **Project** folder.

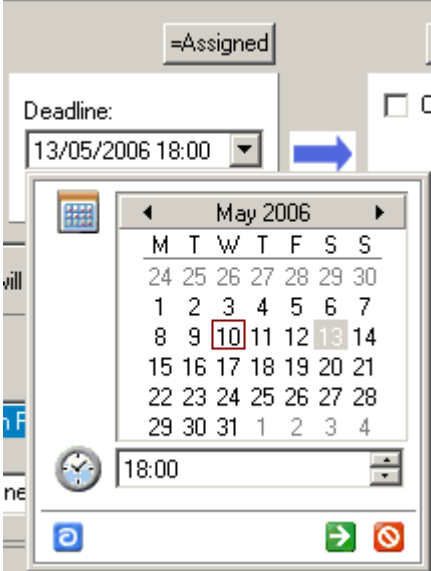
- The **Client Currency** is displayed in the right part of the **New Client Job** window. If the **Client Currency** is different from your **Base Currency** its exchange rate is displayed as well. It can be changed by clicking the correspondent button and entering the new value to the **Edit Exchange Rate** dialog box.




 **Note:** the exchange rate will be changed for the current financial record only.

- Set the **Assigned**, **Deadline** and **Completed** dates for the job using the corresponding drop-down fields.

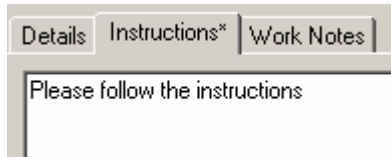
➔ Example: Setting the deadline date:



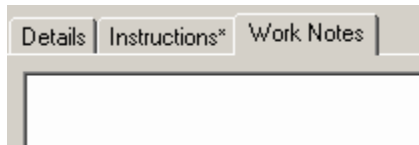
- To select deadline month, click the right and left arrows near the month name.
- To select deadline date, click the day number.
- To select deadline time, click the up and down arrows near the time field. You can also enter the time manually.
- To set the deadline equal to assigned date click **Assigned** button.
 **Note:** Similarly use **Deadline** and **Now** buttons above the **Completed** field to set the date of completion equal to deadline date or the current time&date correspondingly.

Instructions and Work Notes tabs

On the **Instructions** page you can add the client instructions for the **Job**. Asterisk (*) on **Instructions** tab indicates that some instructions were added.



On **Work Notes** page you can insert your notes for the **Client Job**.



To finish creating the **Job**, click **OK** in down-left corner of the **New Client Job** window.

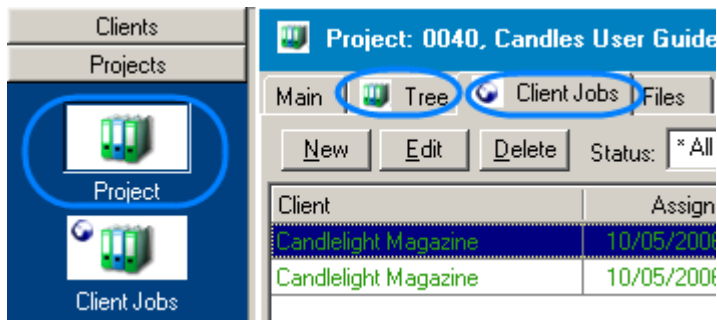
8.4 Modifying a Client Job

While working on the job, you may need to change some information about it, export it using .RTF template it or to register the completion date when it is completed.

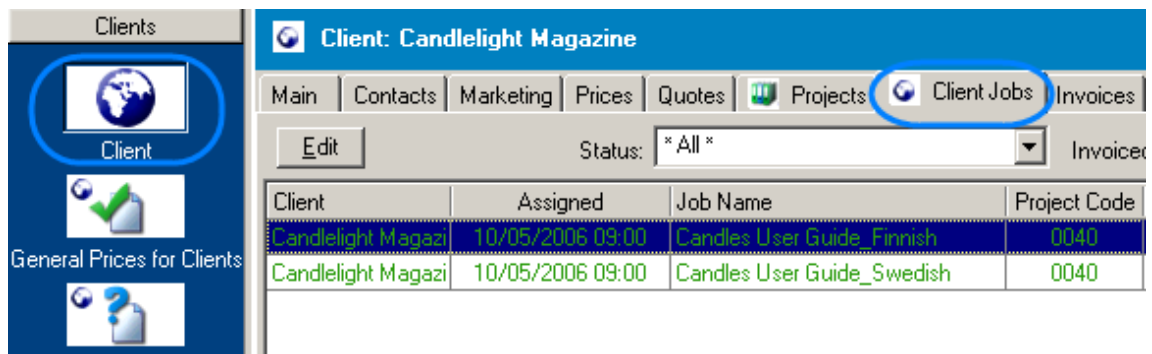
Client Jobs details can be accessed in the Edit Project window displayed on double-clicking the correspondent **Job** record or on **Edit** button click from the **Clients Job** page of the **Client** window or from the **Tree** or **Client Jobs** page of the **Project** window.

To change the details of the Client Job:

1. Switch to the **Tree/Client Jobs** page of the **Project** window or the **Client Jobs** page of the **Client** window:



or



2. Select the necessary **Client Job** record and double-click it or click **Edit** button.
3. Make the changes required in the Edit Client Job window displayed.

See Also:

Deleting a Client Job record

Modifying a Project

8.4.1 Edit Client Job window

In the **Edit Client Job** window you can change the earlier entered information about the job, i.e. the **Job** name, timeline etc. You can also export the **Client Job** description to the .RTF format using .RTF templates.

Edit Client Job window opens on the **Edit** button click from the **Clients Job** page of the **Client** window, from the **Tree**, **Client Jobs** or **Schedule** page of the **Project** window.

The general view of the **Edit Client Job** window:

Edit Client Job

Client: **Candlelight Magazine** Code: J-CANMAGB0001
 Project: **0040, Candles User Guide** Client Ref.:
 Client PM: **None** Client PO:

Details | Instructions | Work Notes

Name:

Group:

Service:

Volume:

Price:

Total: 3,450.00 Client Currency: USD
 1 USD = 0.77 EUR

Project Folder: C:\Business\Projects\0040 Candles User Guide\

Timeline

Assigned: (today) → Deadline: (in 3 days) → Completed:

RTF Templates:

Most of the fields of the **Edit Client Job** window are the same as in the New Client Job window. But here you can also select the .RTF template to save, view or print the .RTF file containing the project (Use **RTF Templates** drop-down list and **Save**, **Save&Open** and **Print** buttons):

RTF Templates:

See Also:

Modifying a Client Job

Deleting a Client Job record

Modifying a Project

AnyCount

CATCount

8.5 Deleting a Client Job record

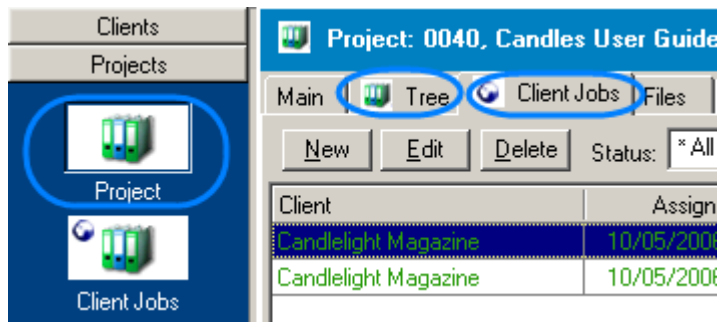
You can delete a **Client Job** record from the **Tree** or **Client Jobs** page of the **Project** window.

Note: You cannot delete a **Client Job** if it is included to any **Invoice**.

Note: When you delete a **Client Job** record with not the last **Code** number the previous **Client Jobs Codes** do not change.

To delete a Client Job record

1. Switch to the **Tree** or **Client Jobs** page of the **Project** window



2. Select the necessary **Client Job** record and click **Delete** button.
3. Confirm the deletion or go to the **Invoices to Clients** window to delete the **Job** from the **Invoices** first.

See Also:

Changing Invoice details

9 Invoices to Clients

In **Translation Office 3000 V8** you have a possibility to issue quotes to clients with a list of jobs, their cost, client discounts/markups, taxes applied and other necessary details.

You can create and manage **Invoices** to a selected **Client** on the **Invoices** page of the **Client** window:

Client	Global Code	Sent	Invoice Total	Paid	Balance Due
Snowmaker Corporation	ACME-1001C	20/01/2006	45.00	45.00	0.00
Snowmaker Corporation	ACME-10011	20/01/2006	1400.00	1400.00	0.00

and you can view and edit all **Invoices** (to all **Clients**) in the **Invoices to Clients** window:

Client	Global Code	Sent	Invoice Total	Paid	Balance Due	Status	Invoice Total (B)	Paid (B)
Snowmaker Corporation	ACME-1001C	20/01/2006	45.00	45.00	0.00	Settled: 30 days earlier	45.00	45.00
Snowmaker Corporation	ACME-10011	20/01/2006	1400.00	1400.00	0.00	Settled: 30 days earlier	1400.00	1400.00
Parallel Dimensions Travel	ACME-10012	20/01/2006	4445.76	4445.76	0.00	Settled: 21 days earlier	3423.24	3423.24
Wishmaster Guild Entertain	ACME-10013	20/01/2006	57.60	57.60	0.00	Settled: 21 days earlier	44.35	44.35
Winged Motors Corporation	ACME-10014	20/01/2006	2250.00	0.00	2250.00	Overdue 55 days late	1732.50	0.00
Winged Motors Corporation	ACME-1001E	20/01/2006	1512.00	0.00	1512.00	Overdue 55 days late	1164.24	0.00
Ocean World University	ACME-1001E	21/01/2006	6300.00	0.00	6300.00	Overdue 75 days late	3956.40	0.00

Please see:

Creating a new Invoice

Changing Invoices details

See Also:

Invoices page of the Client window

Invoices to Clients window

Templates

9.1 Invoices page of the Client window

Invoices page of the **Client** window helps you to keep records of invoices and balances of a particular client. You can add new invoices, edit and delete them, and also make them void.

Besides, you can change status of the invoice (**Approved** or **Not**). A general view of this page is provided below.

Client	Global Code	Sent	Invoice Total	Paid	Balance Due	Status	Invoice Total (B)	Paid (B)	Balance Due (B)
Snowmaker Corporation	ACME-1001C	20/01/2006	0.00	0.00	0.00	Voided	0.00	0.00	0.00
Snowmaker Corporation	ACME-10011	20/01/2006	1400.00	1400.00	0.00	Settled: 30 days earlier	1400.00	1400.00	0.00

To open the **Invoices** page, open the **Client** window (using **Navigation** panel or **Navigation** menu) and then click **Invoices** tab.

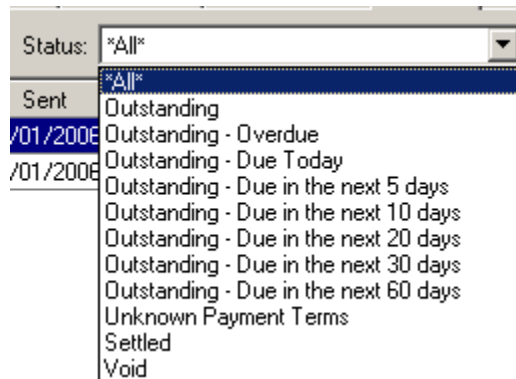
Click **New** button to open New Invoice window and create a new invoice record.
See Also: Creating a New Invoice.

Click **Edit** button to open Edit Invoice window and change the details of the selected **Invoice**.

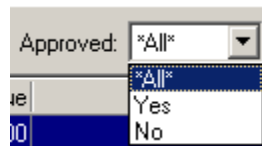
Click **Delete** button to delete the selected **Invoice**.

Click **Void** button to void the selected **Invoice** (voiding is used when you want to delete the invoice, but it cannot be deleted due to the settings. More details...)

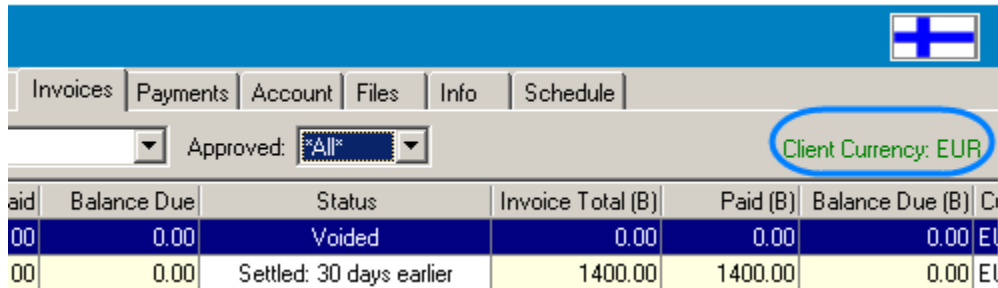
Using **Status** drop-down list you can select to display only Invoices with certain status:



Using **Approved** drop-down list you can select to display only **Approved/Not Approved** or all **Invoices**:



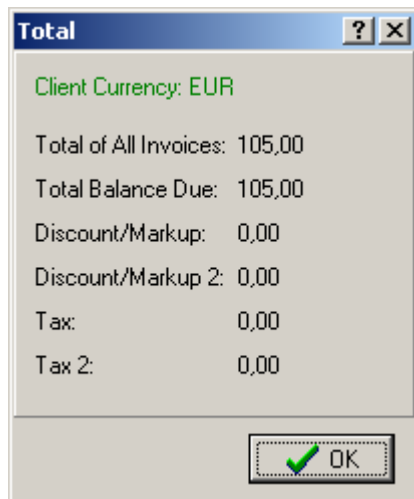
 **Note:** **Client Currency** of the selected **Client** is displayed in the upper right part of the **Invoices** page of the **Client** window:



aid	Balance Due	Status	Invoice Total (B)	Paid (B)	Balance Due (B)	Cr
00	0.00	Voided	0.00	0.00	0.00	EU
00	0.00	Settled: 30 days earlier	1400.00	1400.00	0.00	EU

Click **Calculate Totals** button at the bottom right of the **Invoices** page to view the totals of activities of all invoices from the page (i.e. all invoices for the selected client):

On the **Total** window you will see:



Total	
Client Currency: EUR	
Total of All Invoices:	105,00
Total Balance Due:	105,00
Discount/Markup:	0,00
Discount/Markup 2:	0,00
Tax:	0,00
Tax 2:	0,00

OK

 **Note:** The **Payment Terms** of the selected **Client** are displayed in the bottom left corner of the **Invoices** page of the **Client** window.

As any table you can find in [Translation Office 3000 V8](#) , list of **Invoices** on the **Invoices** page

can be sorted by each column values by clicking the corresponding column caption. Right-click on the list to access **Customize Columns** and **Vertical View** commands, which allow correspondingly to customize which columns you want to display and view in vertical view. See Right-click menu for details.

See Also: Creating a new Invoice


9.2 Invoices to Clients window

On the **Invoices to Clients** window you view and edit the list of all **Invoices** from your TO3000 database.

To open the **Invoices to Clients** window click **Invoices to Clients** icon from the **Clients** part of the **Navigation** panel or click menu **Navigation > Invoices to Clients**.

The general view of the **Invoices to Clients** window:

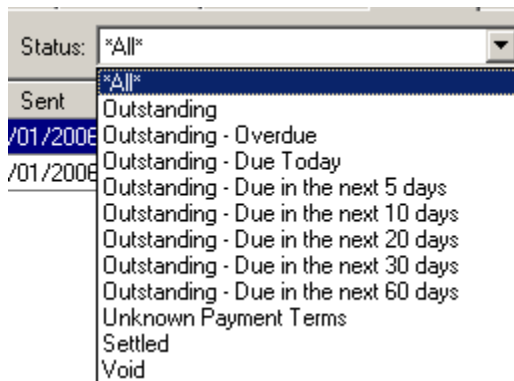
Invoices to Clients						
Edit		Status: *All*		Approved: *All*		
Client	Global Code	Sent	Invoice Total	Paid	Balance Due	Status
Snowmaker Corporation	ACME-10010	20/01/2006	45.00	45.00	0.00	Settled: 30 days earlier
Snowmaker Corporation	ACME-10011	20/01/2006	1400.00	1400.00	0.00	Settled: 30 days earlier
Parallel Dimensions Travel	ACME-10012	20/01/2006	4445.76	4445.76	0.00	Settled: 21 days earlier
Wishmaster Guild Entertain	ACME-10013	20/01/2006	57.60	57.60	0.00	Settled: 21 days earlier
Winged Motors Corporati	ACME-10014	20/01/2006	2250.00	0.00	2250.00	Overdue 90 days late
Winged Motors Corporati	ACME-10015	20/01/2006	1512.00	0.00	1512.00	Overdue 90 days late
Ocean World University	ACME-10016	21/01/2006	6300.00	0.00	6300.00	Overdue 110 days late

 **Note:** Your **Base Currency** is displayed in the upper right corner of the **Invoices to Clients** window.

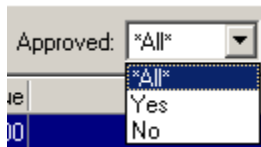
Right-clicking on the list you can select to see the selected record in a vertical view (thus all fields will be visible, no need to scroll) and select what columns to display. More details...

Double-click any record to open the Edit Invoice window and change the **Invoice** details (you can either select the **Invoices** and click **Edit** button).

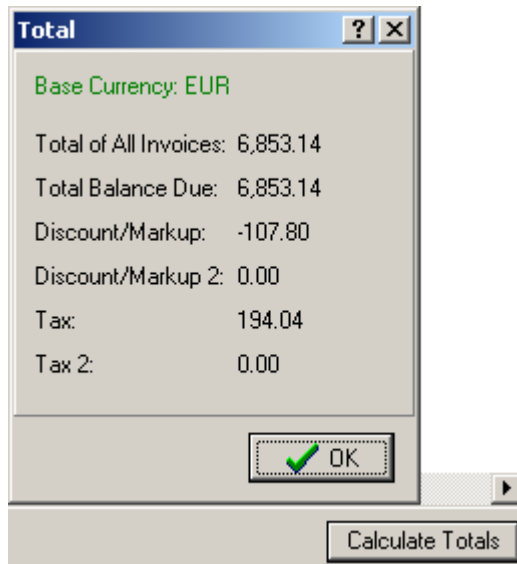
You can view all **Invoices** or select only outstanding/settled/void/etc. **Invoices** to be displayed. Use **Status** drop-down menu to select the condition for displaying:




Similarly you can select to view only approved/not approved **Invoices** using **Approved** drop-down list:



Finally, on the **Invoices to Clients** window you can also see the total figures for all **Invoices**. Simply click the **Calculate Totals** button at the bottom right corner of the **Invoices to Clients** window. In the pop-up **Total** window displayed, you will see the **Total of All Invoices**, **Total Balance Due**, total **Discount/Markup**, total **Discount/Markup 2**, total **Tax** and total **Tax 2** numbers. Click **OK** to close the box.



 **Note:** The total numbers are calculated only for the records displayed. I.e. if the Global Date Filter is switched on, the total numbers are calculated only for the records fitting the filter condition (only such records are displayed if the filter is switched on).

See Also:

Creating a new Invoice

Changing Invoice details

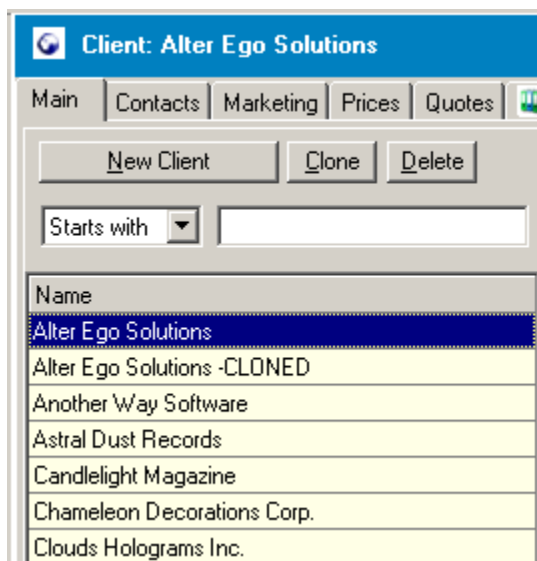
Deleting Invoices. Voided Invoices.

9.3 Creating a new Invoice

Translation Office 3000 V8 provides you with possibility to issue invoices easily using all the necessary data from the database and import them to .rtf format using customizable .rtf templates.

To create a new Invoice:

1. On the **Main** page of the **Client** window select the **Client** the **Invoice** will be addressed to:




2. Switch to the **Invoices** tab of the **Client** window.

Client	Global Code	Sent	Invoice Total	Paid	Balance Due
Snowmaker Corporation	ACME-1001C	20/01/2006	0.00	0.00	0.00
Snowmaker Corporation	ACME-10011	20/01/2006	1400.00	1400.00	0.00

3. Click **New** button.
4. Enter the necessary information to the New Invoice window.

The newly created invoice record will appear in the list of **Quotes** in the left part of the **Quotes** page.

 **Note:** After the **Invoice** is added to your **TO3000** database you can save&print it using the .RTF templates. More details...

See Also:

Changing Invoice details

9.3.1 New Invoice window

In the **New Invoice** window you can specify the necessary details for issuing an **Invoice** (i.e. client jobs, their cost, discounts/markups, taxes, payment method etc.).

New Invoice window opens on **New** button click from **Invoices** page of the **Client** window.

New Invoice

From: **Advanced International Translations**
 To: **Parallel Dimensions Travel Ltd.**

Number of copies: 0
 Date Sent: 27/04/2006
 Code: Auto
 Global Code: ACME-IAuto/2006

Approved (Jobs Locked). Attention: Lane Ellis Annan

Client Jobs | Payment Method | Linked with Payments | Notes

Completed	Job Code	Job Name	Project Manager	Group of Servi	Service

Discount/Markup: None (0.00%) 0.00
 Discount/Markup 2: None (0.00%) 0.00
 Tax: None (0.00%) 0.00
 Tax 2: None (0.00%) 0.00

Client Currency: USD
 1 USD = 0.77 EUR

Net Jobs Total:

Invoice Total: 0.00
 Paid: 0.00
Balance Due: 0.00

RTF Templates will be available after Invoice is entered in database.

To add a job to invoice, click on the **Add Job to Invoice** button. In the appearing **Client Jobs without Invoice** window, select the necessary job click **OK** to add that job to the invoice, or click **Cancel** to exit without adding it.

Client Jobs without Invoice

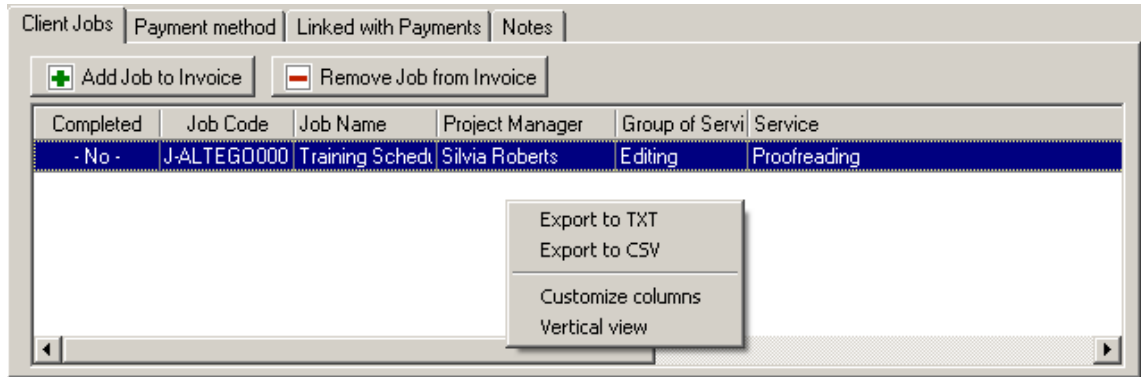
Comp	Job Code	Job Name	Group of Service	Service
No	J-ALTEG0000	philips_savvy_manual	Editing	Proofreading

Select all
 Select all completed

Press Ctrl to select multiple invoices

If on any reason you want to delete the job from the invoice, select it from the list and click the **Remove Job from Invoice** button.

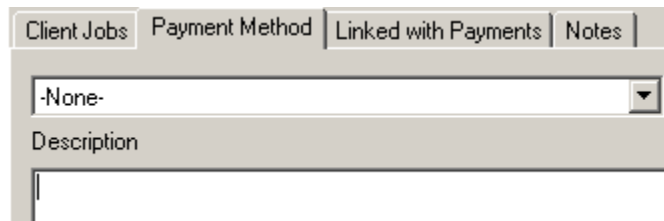
The **Client Jobs** list on the **New Invoice** window (this goes to the Edit Invoice window either) can be sorted by each column value (click the necessary column caption). Right-click on the list to open the menu containing commands for customizing the list view and exporting it to a separate file:



See Right-click menu for details.

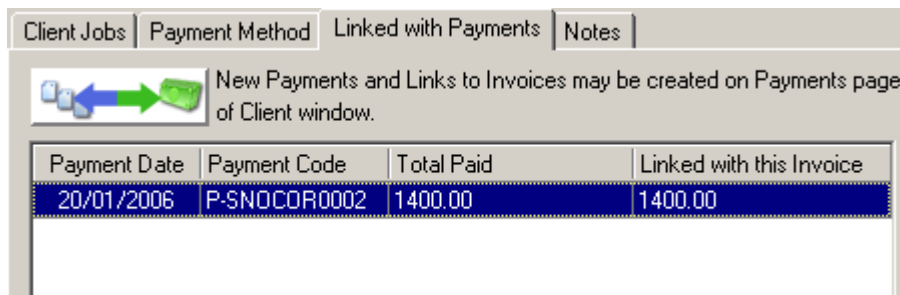
You can set the discounts and markups using the **Discount/Markup, Discount/Markup 2** drop-down lists (you can add/change/delete entries of this lists on the Discounts/Markups page of the Business Settings window).


On the **Payment method** tab of the **New Invoice** window you can select the **Payment method** for this invoice (using the drop-down list), i.e. indication how to transfer funds and details (e.g. requisites).




You can create/delete/modify **Payment methods** on the Payment Methods page of the Business Settings window.

On the **Linked with Payments** tab of the **New Invoice** window you can see if there are any payments linked to the invoice.



 **Note:** you can create links between invoices and payments on the Payments page of the Client window.

You can also create/delete a phantom payment here using **Add Phantom Payment/Delete Phantom Payment** button.

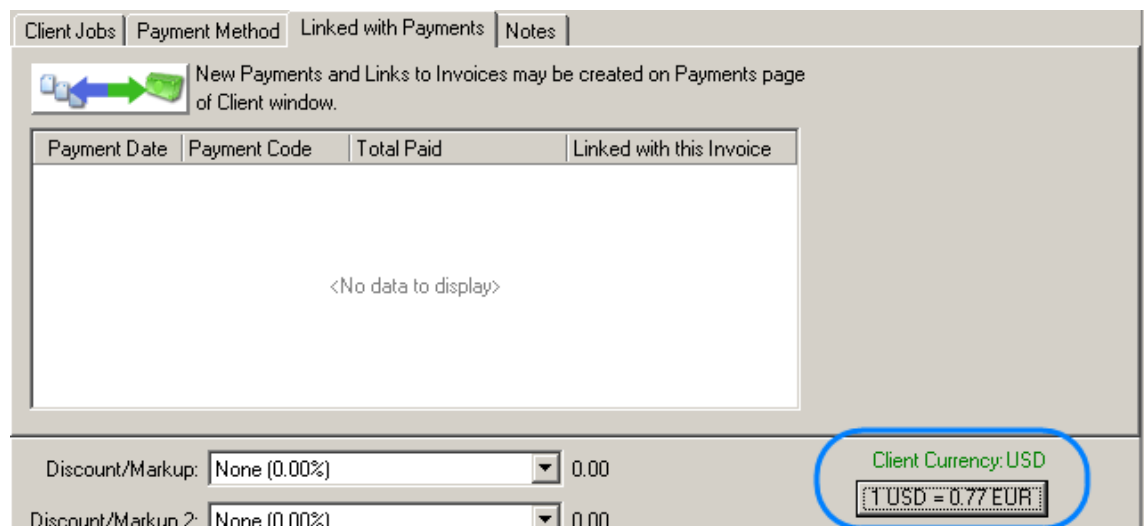
 **Note:** Phantom payments are used to balance negligent parts of invoices which keep **Invoices** with **Outstanding** status, and, this way, move them to **Settled** category. To do this, click **Phantom Payment** button in **Linked with Payments** page of **New Invoice** window.

Phantom payment is created on the total uncovered with payments sum.

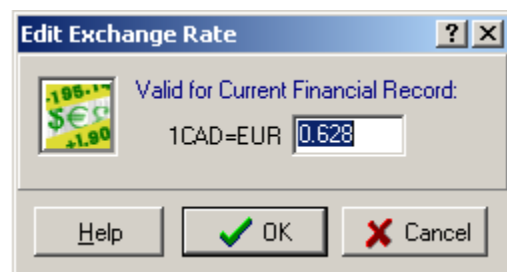
➔ **Example:** Invoice Total = 1000EUR, it is linked with Payment on 997EUR. When you click **Add Phantom Payment** you will be suggested to create a phantom payment on 3EUR. If the invoice is not linked to any payment - you will be suggested to create a phantom payment on with Total equal to the invoice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

Any notes concerning the invoice you can add on the **Notes** tab of the **New Invoice** window.

Under the tabs of the **New Invoice** window the **Client Currency** is displayed (see the screenshot above). If the **Client Currency** differs from your **Base Currency**, the exchange rate button is displayed also:




Clicking the exchange rate button you can change the exchange rate in the **Edit Exchange Rate** dialog box:



Please, note that the rate is changed for the current **Invoice** only!

Now, that you have entered the job to the invoice, click **OK** to save it, or click **Cancel** to discard the changes. This job will be added to the **Invoices** page, and you will be able to edit, delete or

make it void, as well as choose the appropriate status for it.

 **Note:** After the **Invoice** is added to your **TO3000** database you can save&print it using the .RTF templates. More details...

See Also:

Creating a new Invoice

Discounts/Markups settings

Taxes settings

Codes settings

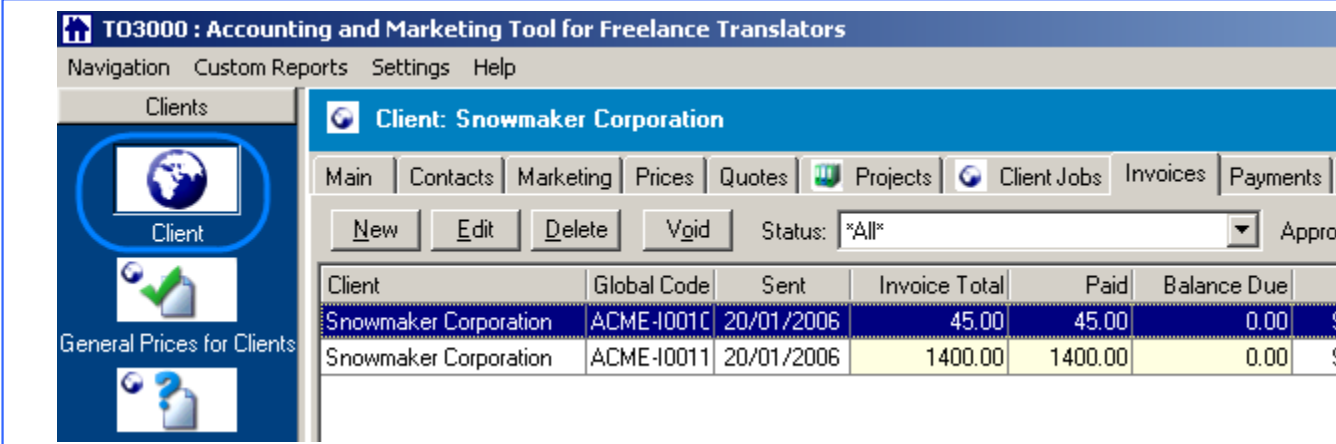
9.4 Changing Invoice details

Until the **Invoice** is not deleted or voided, you can easily change its details.

You can modify invoices from both Invoices related pages of the **TO3000: Invoices** page of the **Client** window (where only **Invoices** of the particular **Client** are displayed) and **Invoices to Clients** window (where all Invoices to all **Clients** are displayed).

To modify the Invoice:

1. Switch to **Invoices** page of the **Client** window (where only **Invoices** of the particular **Client** are displayed) or **Invoices to Clients** window using **Navigation** panel or **Navigation** menu:



TO3000 : Accounting and Marketing Tool for Freelance Translators

Navigation Custom Reports Settings Help

Client: Snowmaker Corporation

Main Contacts Marketing Prices Quotes Projects Client Jobs Invoices Payments

New Edit Delete Void Status: *All* Appro

Client	Global Code	Sent	Invoice Total	Paid	Balance Due	
Snowmaker Corporation	ACME-10010	20/01/2006	45.00	45.00	0.00	\$
Snowmaker Corporation	ACME-10011	20/01/2006	1400.00	1400.00	0.00	\$

Client	Global Code	Sent	Invoice Total	Paid	Balance Due	Sett
Snowmaker Corporation	ACME-I001C	20/01/2006	45.00	45.00	0.00	Sett
Snowmaker Corporation	ACME-I0011	20/01/2006	1400.00	1400.00	0.00	Sett
Parallel Dimensions Travel	ACME-I0012	20/01/2006	4445.76	4445.76	0.00	Sett
Wishmaster Guild Entertain	ACME-I0013	20/01/2006	57.60	57.60	0.00	Sett
Winged Motors Corporation	ACME-I0014	20/01/2006	2250.00	0.00	2250.00	Ove
Winged Motors Corporation	ACME-I001E	20/01/2006	1512.00	0.00	1512.00	Ove
Ocean World University	ACME-I001E	21/01/2006	6300.00	0.00	6300.00	Ove

2. Select the necessary **Invoice** from the list.
3. Click **Edit** button.
4. Make the necessary changes in the Edit Invoice window.

See Also:

Creating a new Invoice

Deleting Invoices. Voided Invoices.

9.4.1 Edit Invoice window

In the **Edit Invoice** window you can make the necessary changes in the **Invoice** details and import the **Invoice** to .RTF format using templates.

Edit Invoice window can be opened from the **Invoices to Clients** window as well as from the **Invoices to Clients** window on **Edit** button click.

The general view of the **Edit Invoice** window:

Edit Invoice (Protected mode, 07:00 left)

From: Advanced International Translations
To: Winged Motors Corporation

Number of copies:

Date Sent:

Code: I-WINGED0001
 Global Code: ACME-10014/2006

Approved (Jobs Locked). Attention:

Client Jobs | Payment Method | Linked with Payments | Notes

Completed	Job Code	Job Name	Project Manager	Group of Servi	Service
20/08/2005 18:	J-WINGED00C	LS Drive - 1305	Kevin Belt	Translation	English => Swedish

Discount/Markup: 0.00

Discount/Markup 2: 0.00

Net Jobs Total: 2250.00

Tax: 0.00

Tax 2: 0.00

Client Currency: USD
 1 USD = 0.77 EUR

Invoice Total: 2250.00
 Paid: 0.00
Balance Due: 2250.00

RTF Templates:

Working with **Invoice** details in the **Edit Invoice** window is absolutely similar to the procedure of adding the details in the **New Invoice** window. More details...

The only important additional option available from the **Edit Invoice** window is importing the **Invoice** to the .RTF file using custom templates. For this select the template from the **RTF Templates** drop-down list at the bottom of the **Edit Invoice** window and click one of the buttons according to your needs (you can save the invoice, save and open it at once or just print):

RTF Templates:

More details on .RTF templates...


See Also:

Deleting Invoices. Voided Invoices.


Creating a new Invoice


9.5 Deleting Invoices. Voided Invoices.

You can delete the **Invoice** record from the **TO3000** database on the **Invoices** page of the **Client** window.

 **Note:** By default only last **Invoice** (i.e. **Invoice** with the last number in the database) can be deleted. Other **Invoices** (i.e. **Invoices** with numbers in the middle of the range of numbers) can be only voided. To change this setting and allow deleting any **Invoices** select the **Invoices in the middle of the range can be deleted** option on the General page of Advanced settings.

To delete the Invoice:

1. Switch to the **Invoices** page of the **Client** window.
2. Select the necessary **Invoice** record from the list.
3. Click **Delete** button. If the **Invoice** cannot be deleted due to your settings (see the  Note above) the error message will appear and the record will not be deleted (you will need to void it, see below) otherwise the deletion confirmation dialog will pop-up.

If the **Invoice** cannot be deleted (see the  Note above), you can void it. It will be still displayed in the list of **Invoices**, but you will be able to modify it and will be only able to see the details in the View Voided Invoice window.

To void the Invoice:


1. Switch to the **Invoices** page of the **Client** window.
2. Select the necessary **Invoice** record from the list.
3. Click **Void** button. **View Voided Invoice** window will appear, where you can enter the reason for voiding of the invoice, date of voiding, and see the details of the voided invoice.

9.5.1 View Voided Invoice

View Voided Invoice window displays the details of the voided **Invoice** and the date and reason of voiding.

It appears on **Void** button click or if you try to open for editing the voided **Invoice** (i.e. double-click it or click **Edit** button when the **Invoice** is selected)

View Voided Invoice

 **Sent: 2/1/2006** Date Marked Void: 2/3/2006
From: Advanced International Translations Code: J-ALTEGO0002
To: Alter Ego Solutions Global Code: ACME-10018/200

Reason:

Details:

--- Client Jobs ---
Code: J-ALTEGO0002
Client Ref.:
PD Number:
Name: Training Schedule
Assigned: 1/20/2005 12:00 AM
Deadline: 1/20/2005 6:00 PM
Status: - No -
Completed: 1/20/2005 11:31 PM
Price: 35,00
Volume: 3
Pricing: per unit
Exchange Rate: 1
Total: 105,00

--- Discounts ---
Discount 1: None 0,00

OK Cancel

See Also:

Deleting Invoices. Voided Invoices.

10 Payments from Clients

Translation Office 3000 V8 provides you with possibility to register payments you receive from clients and link it with the correspondent **Invoice**.

You can view the list of all **Payments** from the database in the Payments from Clients window:

Client	Date Received	Code	Total Paid	Linked	Not Linked
Snowmaker Corporation	20.01.2006	P-SNOCOR01	45,00	45,00	0,00
Snowmaker Corporation	20.01.2006	P-SNOCOR01	1400,00	1400,00	0,00
Parallel Dimensions Travel	20.01.2006	P-PARADIMC	4500,00	4445,76	54,24
Wishmaster Guild Entertain	20.01.2006	P-WISHENTC	57,60	57,60	0,00
Parallel Dimensions Travel	20.01.2006	P-PARADIMC	600,00	600,00	0,00
Alter Ego Solutions	20.01.2006	P-ALTEGOOC	5411,00	0,00	5411,00
Electric Dream Design	21.01.2006	P-EDD0001	100,00	0,00	100,00
Winged Motors Corporator	21.01.2006	P-WINGEDOC	234,00	0,00	234,00
Ocean World University	21.01.2006	P-OCEAN00C	344,00	0,00	344,00
Ocean World University	21.01.2006	P-OCEAN00C	623,00	0,00	623,00

You can view the list of **Payments** from the particular **Client** on the Payments page of the Clients window:

Client	Date Received	Code	Total Paid	Linked	Not Linked
Snowmaker Corporation	20/01/2006	P-SNOCOR01	45.00	45.00	0.00
Snowmaker Corporation	20/01/2006	P-SNOCOR01	1400.00	1400.00	0.00

Note: the **Client** is selected on the **Main** page of the **Client** window, its name is displayed in the window header.

Please see:

Adding a new Payment

Changing Payment details

10.1 Payments page of the Client window

On the **Payments** page of the **Client** window you can view and manage the list of **Payments** from the particular **Client** (the **Client** is selected on the **Main** page of the **Client** window, the name of the selected **Client** is displayed in the window header).

The general view of the **Payments** page of the **Client** window:

Client	Date Received	Code	Total Paid	Linked	Not Linked
Snowmaker Corporation	20/01/2006	P-SNOCOR01	45.00	45.00	0.00
Snowmaker Corporation	20/01/2006	P-SNOCOR01	1400.00	1400.00	0.00

Right-clicking on the list and using the displayed menu you can see the selected record in a vertical view (thus all fields will be visible, no need to scroll), specify what columns to display and change their order. More details...


You can view all existing **Payments** or select only linked/not linked payments to be displayed. Use **Status** drop-down menu to select the condition for displaying:

Client	Date Received	Code	Status
Parallel Dimensions Travel	1/20/2006	P-PARADIMC	* All *

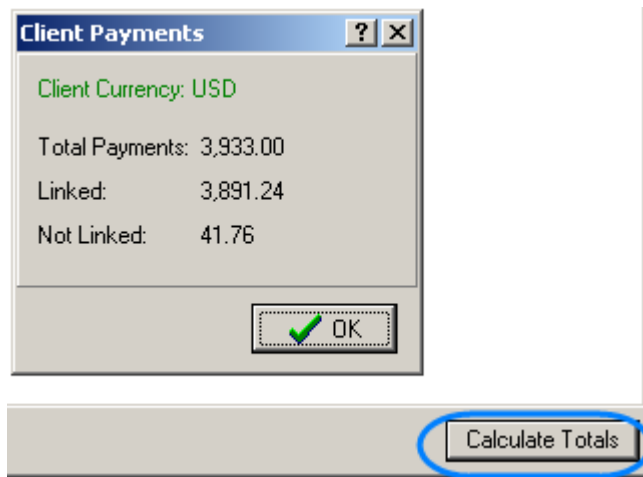
Click **New** button to open New Payment window and create a new **Payment** record.
See Also: Adding a new Payment.

Click **Edit** button to open Edit Payment window and change the details of the selected **Payment**.

Click **Delete** button to delete the selected **Invoice**.

 **Note:** The **Client Currency** is displayed in the upper right corner of the **Client Payments** page.

Finally, on the **Payments** page of the **Client** window you can also see the total figures. Simply click the **Calculate Totals** button at the bottom right corner of the **Payments** page. In the pop-up **Client Payments** window displayed, you will see the **Total Payments** number, **Linked** and **Not Linked** number for the **Payments** of the current **Client**. Click **OK** to close the box.



See Also:

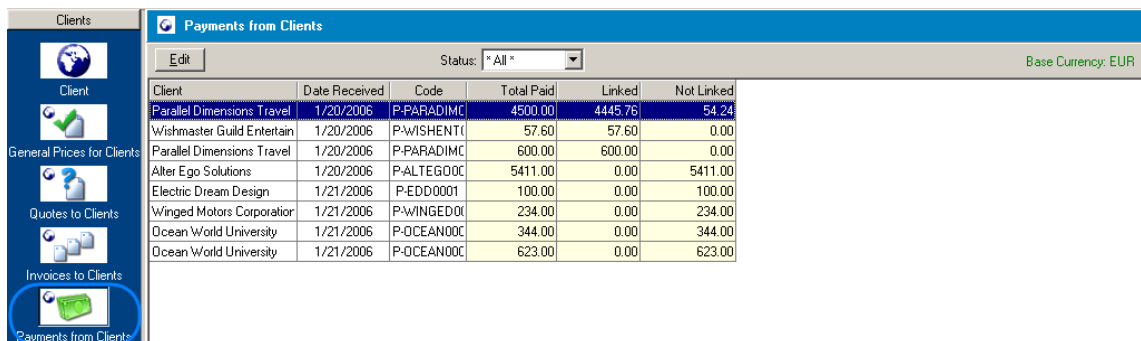
- Payments from Clients window
- Adding a new Payment
- Changing Payment details
- Deleting a Payment
- Multi-Currency Support

10.2 Payments from Clients window

On the **Payments from Clients** window you can view and edit all **Payment** records from all **Clients**.

To open **Payments from Clients** window click **Payments from Clients** icon in the **Navigation** panel or select menu **Navigation > Payments from Clients**.

The general view of the **Payments from Clients** window:



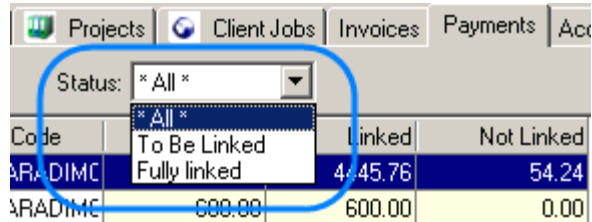
Note: Your **Base Currency** is displayed in the upper right corner of the **Payments from**

Clients window.

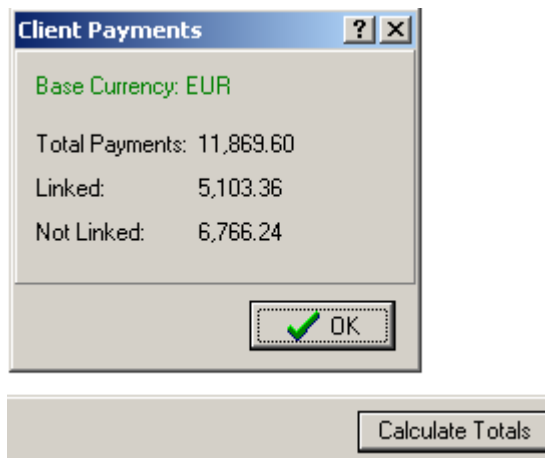
Right-clicking on the list and using the displayed menu you can see the selected record in a vertical view (thus all fields will be visible, no need to scroll), specify what columns to display and change their order. More details...

Double-click any record to open the Edit Payment window and change the **Payment** details (you can either select the **Payment** and click **Edit** button).

You can view all existing **Payments** or select only linked/not linked payments to be displayed. Use **Status** drop-down menu to select the condition for displaying:



Finally, on the **Payments from Clients** window you can also see the total figures for all **Payments**. Simply click the **Calculate Totals** button at the bottom right corner of the **Payments from Clients** window. In the pop-up **Client Payments** window displayed, you will see the **Total Payments** number, **Linked** and **Not Linked** number. Click **OK** to close the box.



See Also:

Payments page

Adding a new Payment

Deleting a Payment

Multi-Currency Support

10.3 Adding a new Payment

Translation Office 3000 V8 provides you with possibility to register payments you receive from clients and link it with the correspondent **Invoice**.

New **Payment** records can be added on the **Payments** page of the **Client** window.

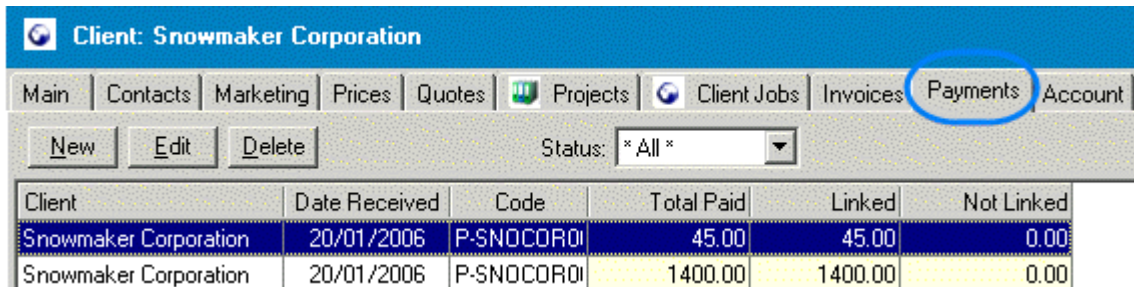
To add a new Payment record

1. Open the **Clients** list on the **Client Main** page. For this click **Clients** icon in the **Navigation** panel (**Main** tab opens automatically when you open **Client** window) or click **Navigation > Client > Main**.



2. Select the **Client** the **Payment** is received from.

3. Switch to the **Payments** page of the **Client** window clicking the **Payments** tab:



4. Click **New** button. **New Payment** window will open.
5. Fill the fields of the **New Payment** window (you can link the **Payment** with the **Invoice** here). More details...

After the record is added it appears in the list of the **Payments** on the **Payments** page of the **Client** window and in the list on the Payments from Clients window.

See Also:

Changing Payment details

Invoices to Clients

10.3.1 New Payment window

In the **New Payment** window you can enter the details of the payment received from the client when creating a new **Payment** record, you can also link the **Payment** with a particular **Invoice**.

New Payment window opens on the **New** button click from the **Payments** page of the **Client** window.

The general view of the **New Payment** window:

New Payment

From: Snowmaker Corporation Date Received: 5/24/2006
To: Advanced International Translations Code: Auto

Payment Linked with Invoices

Value:
45,00

Notes:

Linked: 0,00 Client Currency: EUR
Not Linked: 45,00


RTF Templates will be available after Payment is entered in database.

Help OK Cancel

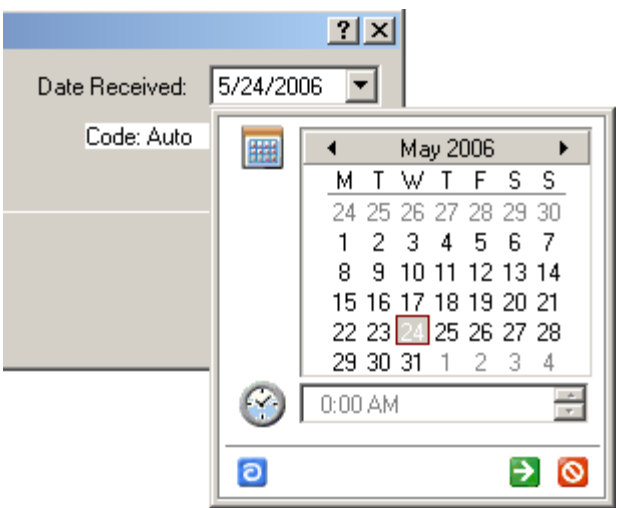
- In the upper left corner the From/To details are displayed in the following form:

From: "Client Name"

To: "Your registration name"


 **Note:** The registration name cannot be manually changed from TO3000. To change the registration please contact the support team at support@translation3000.com

- In the upper right corner of the **New Payment** window you can specify the date when the payment was received using **Date Received** drop-down calendar:



- To select the month, click the right and left arrows near the month name.
- To select the date, click the day number.

Click the little green icon to confirm the date set or the red icon to cancel.

 **Note:** Click the little blue icon to set the **Received Date** to the current date.

- Enter the sum of **Payment** in the **Value** field:

Value:

- Enter any necessary additional information about the payment in the **Notes** field:

Notes:

- Switch to the **Linked with Invoices** tab to create a link between the **Payment** and **Invoice**.

Payment **Linked with Invoices**

Invoice Code	Invoice Date	Invoice Total	Linked with this Payment	Date Due
<No data to display>				

Buttons: **New Link**, Edit, Delete, Add Phantom Invoice

If there is an **Invoice** to the **Client** in the database and it is not completely "covered" with a **Payment**, the **New Link** button is active.

On the **New Link** button click the **Select Invoice** window opens where you can select the **Invoice** to link with the **Payment**:

Select Invoice

Link Value: **45.00** Select All

Approved Unsettled Invoices

Code	Invoice Date	Invoice Total	Total Paid (Other Payments)	Balance	Date Due
I-SNOCOR0001	1/20/2006	45.00	0.00	45.00	2/19/2006

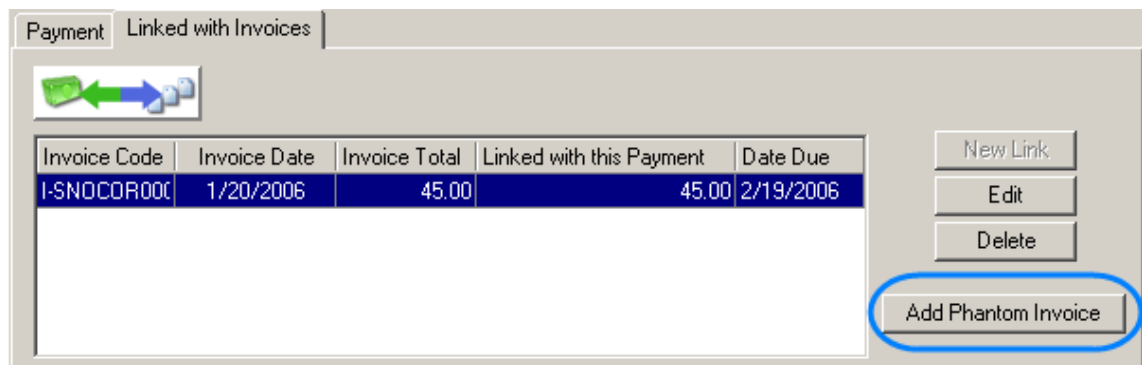
Buttons: Help, OK, Cancel

Note: Press and hold Ctrl to select multiple Invoices

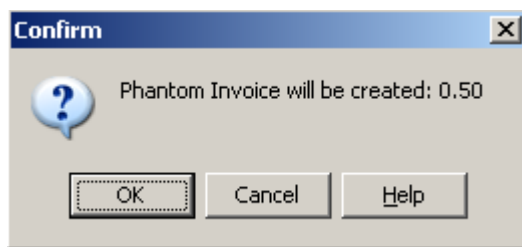
Note: You can link the **Payment** with several **Invoices**.

Now you can change the link value using **Edit** button or delete the link with invoice clicking **Delete** button.

- In case some small amount is left uncovered by the **Invoices** and is considered negligent, you can create a **Phantom Invoice** to keep your records in order and close the **Payment**. To create a **Phantom Invoice** click **Add Phantom Invoice** button:



and confirm the creation of the **Phantom Invoice**:



See Also:

Adding a new Payment

Changing Payment details

Edit Payment window

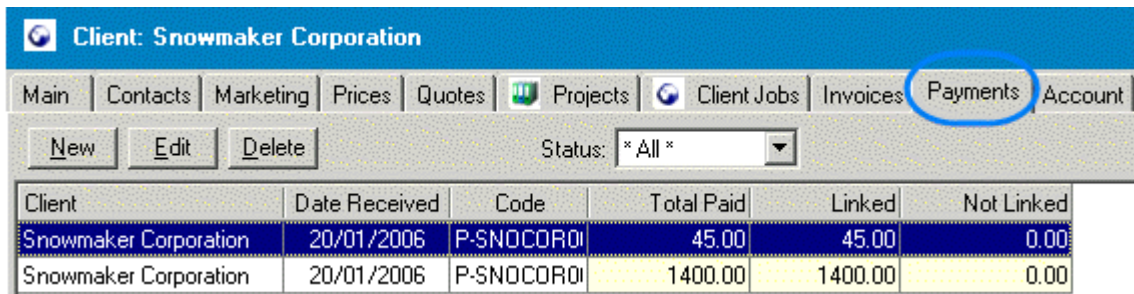
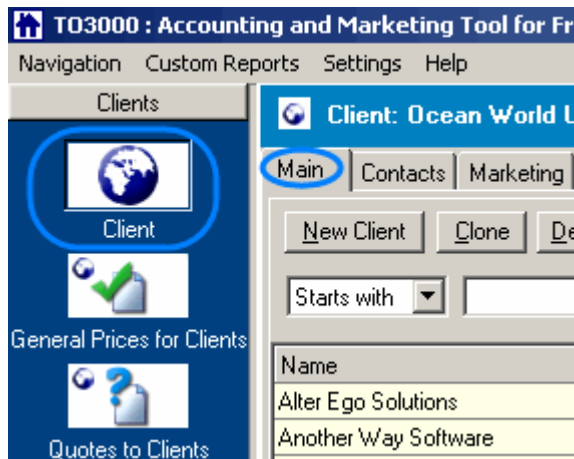
10.4 Changing Payment details

You may need to change some information about the payment or link it with the Invoice after the **Payment** record was already created.

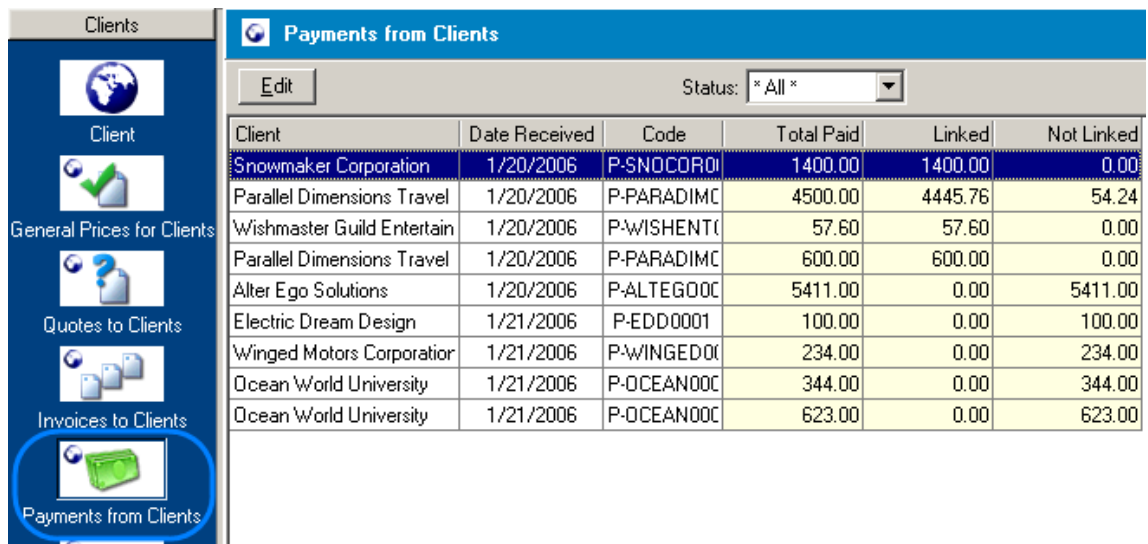
You can make the changes in the **Payment** record on the **Payments** page of the **Client** window, where the **Payments** from the particular **Client** are displayed, or from the **Payments from Clients** window, where all **Payments** from all **Clients** are displayed.

To change the Payment details

1. Select the necessary **Client** on the **Main** page of the **Client** window, switch to the **Payments** page and select the necessary **Payment**:



or select the necessary **Payment** record from the **Payments from Clients** window:



2. Double click the selected record or click the **Edit** button. The **Edit Payment** window will open.

3. Make the necessary changes in the **Edit Payment** window. More details...

See Also:

Payments from Clients window

10.4.1 Edit Payment window

In the **Edit Payment** window you can make changes in the earlier created **Payment** record.

The **Edit Payment** window opens on **Edit** button click from the **Payments** page of the **Client** window, where the **Payments** from the particular **Client** are displayed, or from the **Payments from Clients** window, where all **Payments** from all **Clients** are displayed. It also appears if you double-click the **Payment** record.

The general view of the **Edit Payment** window:

The screenshot shows the 'Edit Payment' window with the following details:

- Title:** Edit Payment
- From:** Electric Dream Design
- To:** Advanced International Translations
- Date Received:** 1/21/2006
- Code:** P-EDD0001
- Payment:** Linked with Invoices
- Value:** 100.00
- Notes:** (Empty text area)
- Client Currency:** EUR
- Linked:** 0.00
- Not Linked:** 100.00
- RTF Templates:** Payment from Client - Template - English.rtf
- Buttons:** Save, Save&Open, Print, Help, OK, Cancel

The **Client Currency** is displayed under the **Notes** field (see the screenshot above). If the **Client Currency** differs from your **Base Currency**, the exchange rate button is displayed also:

Payment | Linked with Invoices

Value:
344.00

Notes:

Linked: 0.00
Not Linked: 344.00

Client Currency: CAD
1 CAD = 0.628 EUR

Clicking the exchange rate button you can change the exchange rate in the **Edit Exchange Rate** dialog box:

Edit Exchange Rate

Valid for Current Financial Record:
1CAD=EUR 0.628

Help OK Cancel

Please, note that the rate is changed for the current **Payment** only!

 **Note:** if the **Payment** is linked with the **Invoice**, the **Value** and **Date Received** fields cannot be edited. For example:

Edit Payment

From: Parallel Dimensions Travel Ltd. Date

To: Advanced International Translations

Payment | Linked with Invoices

Value:
4500.00

Linked with Invoices. Date and Value of Payment are Locked.

Working with **Payment** details in the **Edit Payment** window is absolutely similar to the procedure of adding the details in the **New Payment** window. More details...

The only important additional option available from the **Edit Payment** window is importing the **Invoice** to the .RTF file using custom templates. For this select the template from the **RTF Templates** drop-down list at the bottom of the **Edit Payment** window and click one of the buttons according to your needs (you can save the invoice, save and open it at once or just print):



See Also:

Changing Payment details

10.5 Deleting a Payment

Payment record can be deleted from the **Payments** page of the **Client** window.

To delete a Payment:

1. Select the necessary **Client** on the **Main** page of the **Client** window, switch to the **Payments** page and select the necessary **Payment**:



Client: Snowmaker Corporation									
Main	Contacts	Marketing	Prices	Quotes	Projects	Client Jobs	Invoices	Payments	Account
New Edit Delete			Status: *All*						
Client	Date Received	Code	Total Paid	Linked	Not Linked				
Snowmaker Corporation	20/01/2006	P-SNOCOR01	45.00	45.00	0.00				
Snowmaker Corporation	20/01/2006	P-SNOCOR01	1400.00	1400.00	0.00				

2. Click **Delete** button and confirm the deletion.

11 Schedules: tracking the Jobs/Projects accomplishment

After a major upgrade, Translation Office 3000 V8 is powered with a new extra handy tool - visual **Schedules** for **Clients** and **Projects**.

Two kinds of the **Schedules** are provided for each of the listed parts of Translation Office 3000 V8:

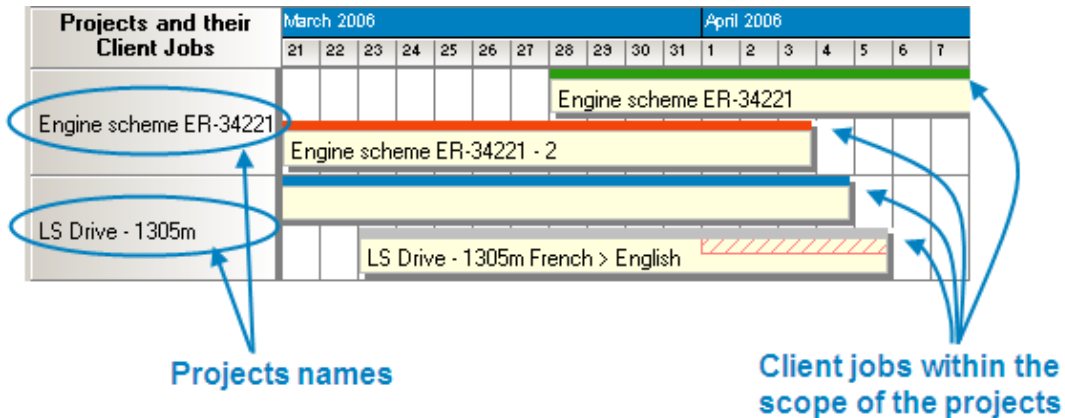
Clients	<ol style="list-style-type: none"> Schedule of projects (and corresponding client jobs) for the selected client. Schedule of all projects.
Projects	<ol style="list-style-type: none"> Schedule of client jobs for the selected project. Schedule of all projects and client jobs.

The general view of the **Schedule** page (**Schedule** of projects (and corresponding client jobs) for the selected client) :

Client: Winged Motors Corporation	
Main	Contacts Marketing Prices Quotes Projects Client Jobs Invoices Payments Account Files Info Schedule
Selected Period: 16/12/2004 - 23/04/2006 Apply	
Column Scale: 1 day Column width: <input type="radio"/> Short <input checked="" type="radio"/> Normal <input type="radio"/> Large	
Projects and their Client Jobs	March 2006 April 2006
	21 22 23 24 25 26 27 28 29 30 31 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18
Engine scheme ER-34221	Engine scheme ER-34221
	Engine scheme ER-34221 - 2
LS Drive - 1305m	LS Drive - 1305m French > English

General issues on Schedules

On the left panel of any **Schedule** page the names of the jobs or projects (depending on the particular **Schedule**) are displayed; the jobs of projects themselves are represented in the form of horizontal columns, colors assigning allows you easily seeing which jobs/projects were completed (in time or late) and all pending jobs/projects (deadline in future/deadline in the past).



The jobs/projects are represented as horizontal columns, their length depends on the **Assigned**, **Deadline**, **Completed** date and the specified time interval. The color shading depends on the job/project status:

	Red frame marks that deadline for the Job was in the past.
	Blue frame marks that deadline for the Job is later today.
	Green frame marks that deadline for the Job is in the future.
	The Job is not/was not finished in time. The red crossed part are the days/hours after the deadline.
	Red dots in the end/in the beginning of the Job column mark that the Job assigned/completed dates are behind the currently selected time period.

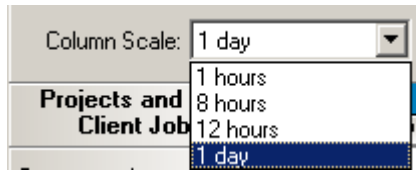
Note: status colors can be changed on the Personal Settings > Colors:Status page.

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

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


Selected Period: -

You can change the calendar graduation using **Column Scale** drop-down list. Each calendar division can represent 1 hour/8 hours/12 hours/1 day:



➔ **Example:**

Each division represents one day	
Each division represents one hour	

 **Note:** The set of available values for calendar graduation varies depending on the length of the **Selected Period**.

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

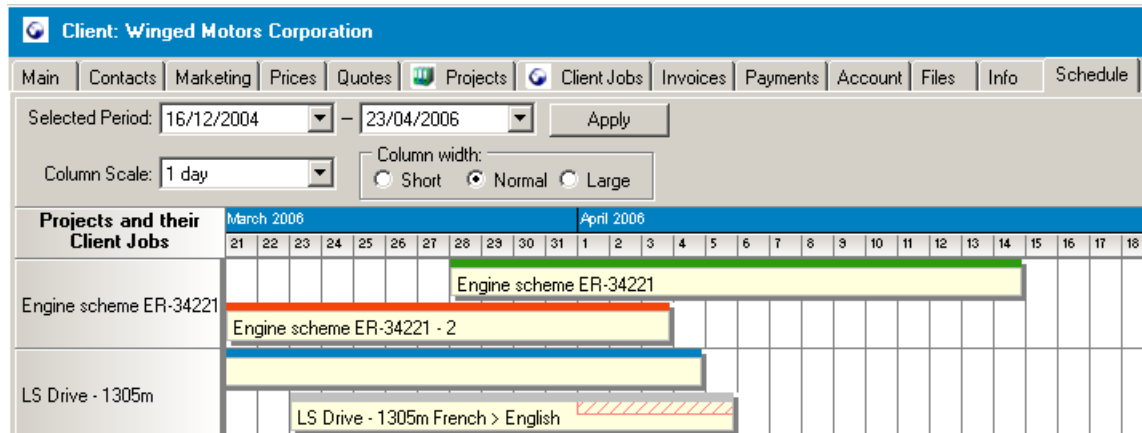


SCHEDULES REVIEW

Clients Schedules

- **Schedule of projects (and corresponding client jobs) for the selected client.**

Have a glance on this schedule to have a clear picture of all pending, due/overdue projects for the selected **Client** for the period specified. For example:



To open **Schedule** for a particular **Client**:

1. Click on the **Client** icon from the **Navigation** panel; switch to the **Main** tab or click menu **Navigation > Main**.



2. Select the necessary **Client** from the **Clients** list on the **Main** tab:



3. Switch to the **Schedule** tab of the **Client** window.
For details see: Schedule page of the Client window

- **Schedule of all projects.**

Have a glance on this schedule to have a clear picture of all pending, due/overdue projects (for all clients) for the period specified. For example:

To open the **Schedule** of all projects click menu **Navigation > Schedule of Projects** or on the **Schedule of Projects** icon from the **Clients** set of **Navigation** panel:



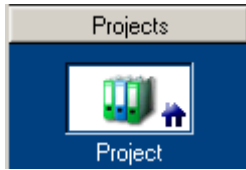
Projects Schedules

- **Schedule of client jobs for the selected project.**

Use this schedule to get the picture of all client jobs of the particular project. At a glance you can see what jobs need attention. Example:

To open **Schedule** for a particular **Project**:

1. Click on the **Project** icon from the **Navigation** panel; switch to the **Main** tab.



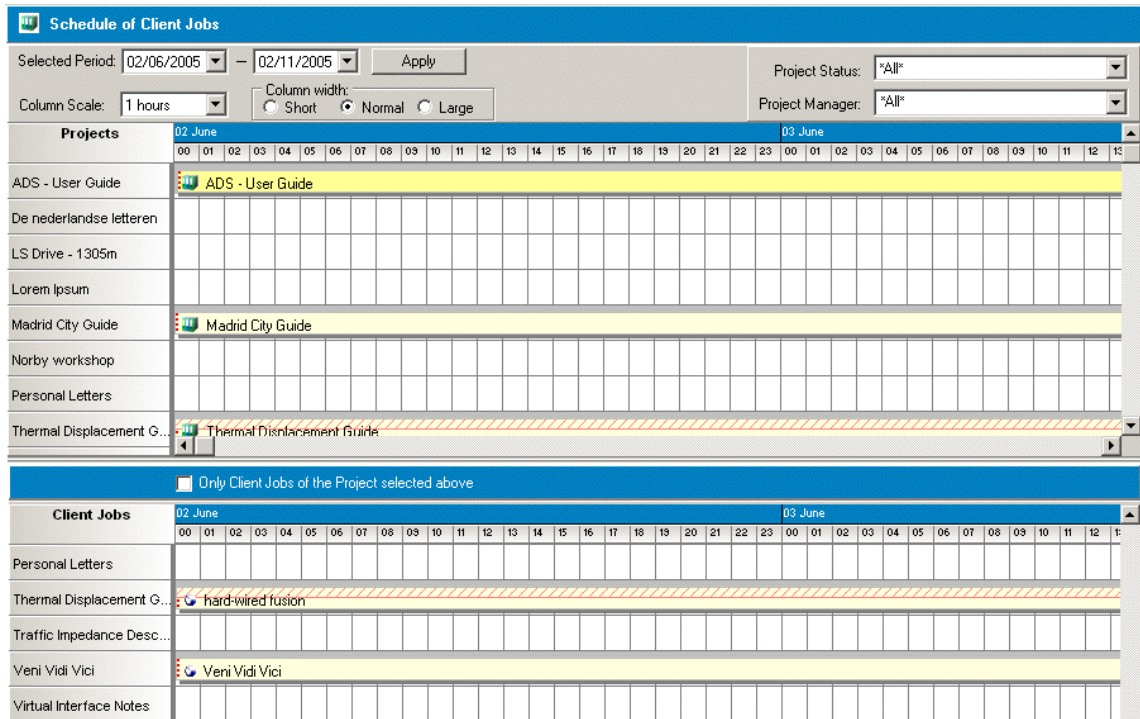
2. Select the necessary **Project** from the **Project** list on the **Main** tab:

Code	Project Name
0018	Engine scheme ER-34221
0019	Veni Vidi Vici
0020	Personal Letters
0021	Lorem Ipsum
0025	LS Drive - 1305m
0027	Aliquam
0033	ADS - User Guide

3. Switch to the **Schedule** tab of the **Project** window.

- **Schedule of all projects and client jobs.**

Use this schedule to get the picture of all projects (and client jobs within their scope) which fall into the selected time interval . At a glance you see what projects need immediate attention.
Example:



To open the **Schedule** of all projects click on the **Schedule of Projects** icon from the **Clients** set of **Navigation** panel.

See Also:

Schedule page of the Client window

Schedule of Projects window

Schedule page of the Projects window

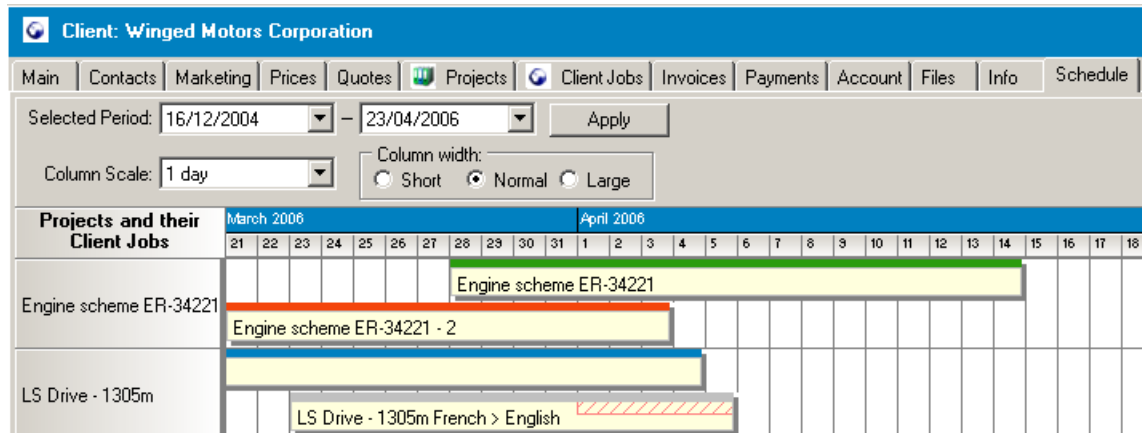
Schedule of Client Jobs window

11.1 Schedule page of the Client window

After a major upgrade, **Translation Office 3000 V8** is powered with a new extra handy tool - visual **Schedules** for **Clients** and **Projects**.



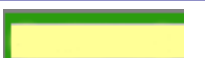

Schedule showing the **Clients Jobs** of the selected client progress can be accessed from the **Schedule** page of the **Client** window.


It represents **Clients Jobs** of the selected **Client** for the specified period in the form of horizontal columns, colors assigning allows you easily seeing which jobs were completed (in time or late) and all pending jobs (deadline in future/deadline in the past). Please see the general view of the page below:



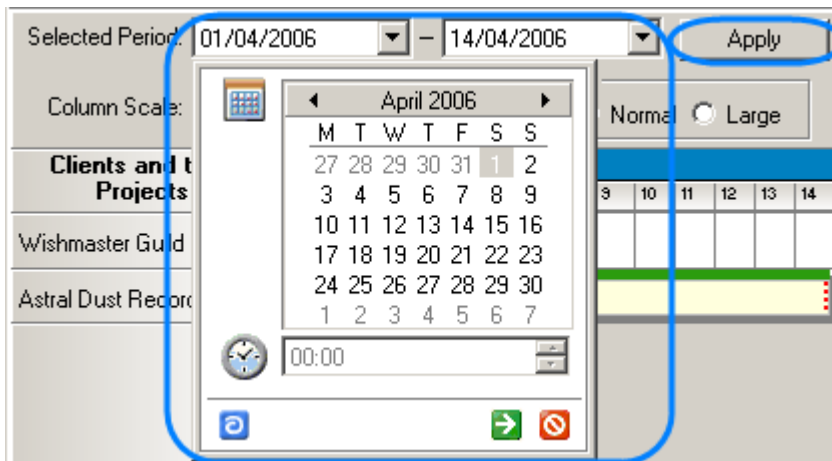
The names of the **Projects** of the current **Client**, whose **Client Jobs Assigned**, **Deadline** or **Completed** date falls into the selected time interval, are displayed on the left. The **Client Jobs** from the scope of this **Projects** are displayed as horizontal columns of different colors (depending on the **Job** status). The **Project Names** are written on the columns, the length of the columns depends on the **Project** timeline.

The color shading according to the **Project** status:

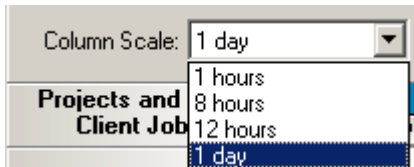
	Deadline was in the past, the Job is current and overdue.
	Deadline is later today.
	Deadline is in the future.
	The Job was overdue. The red crossed part are the days/hours after the deadline.

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

- To set the time period use **Selected Period** drop-down calendars and click **Apply** button:

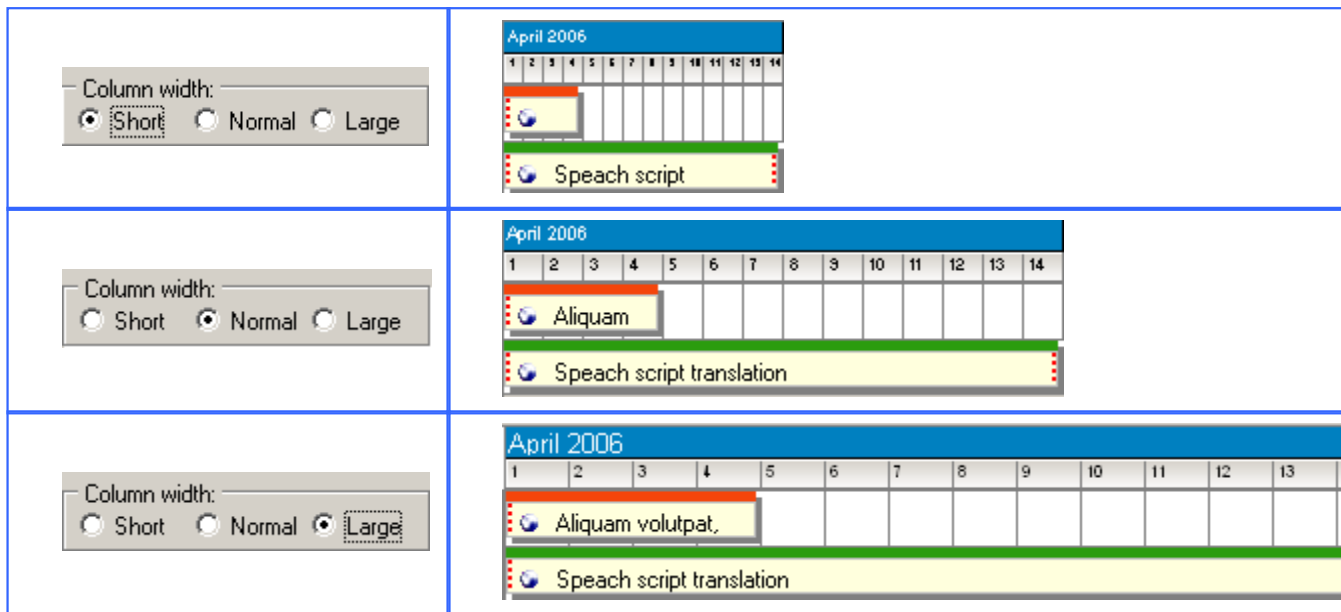


- You can change the calendar graduation using **Column Scale** drop-down list. Each calendar division can represent 1 hour/8 hours/12 hours/1 day:



Note: The set of available values for calendar graduation varies depending on the length of the **Selected Period**.

- You can customize the width of the calendar divisions using **Column width** options:



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

See Also:

Schedules: tracking the Jobs accomplishment

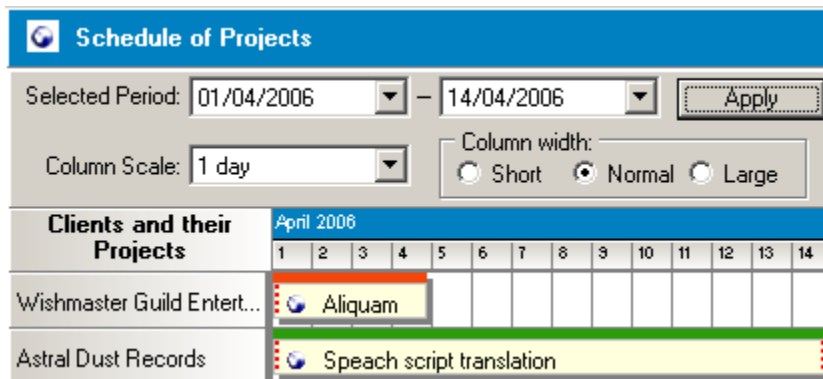
Schedule of Projects window

Schedule page of the Project window

Schedule of Client Jobs window

11.2 Schedule of Projects window

Have a glance on this schedule to have a clear picture of all pending, due/overdue projects (for all clients) for the period specified. For example:








To open the **Schedule** of all projects click menu **Navigation > Schedule of Projects** or on the **Schedule of Projects** icon from the **Clients** set of **Navigation** panel:



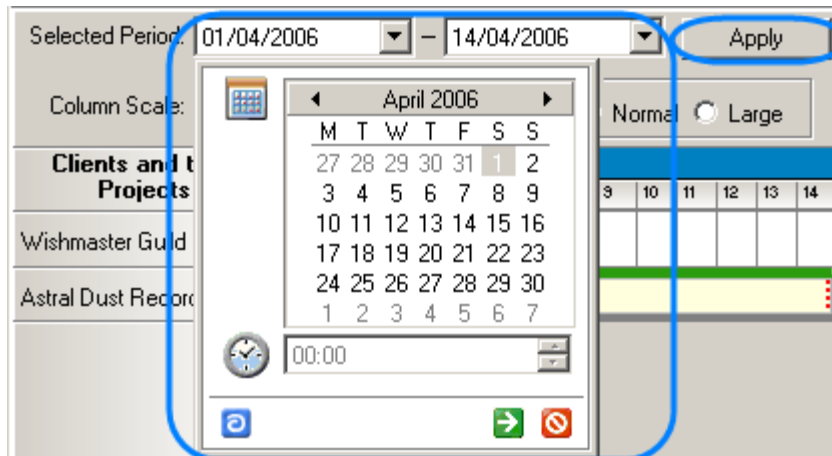
On the **Schedule of Projects** window you can see all **Projects** which fall into the scope of the selected period displayed as horizontal columns of different colors (depending on the **Project** status). The **Project Names** are written on the columns, the length of the columns depends on the **Project** timeline.

The color shading according to the **Project** status:

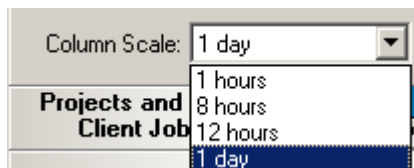
	Deadline was in the past, the Project is current and overdue.
	Deadline is later today.
	Deadline is in the future.
	The Project was overdue. The red crossed part are the days/hours after the deadline.

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

- To set the time period use **Selected Period** drop-down calendars and click **Apply** button:

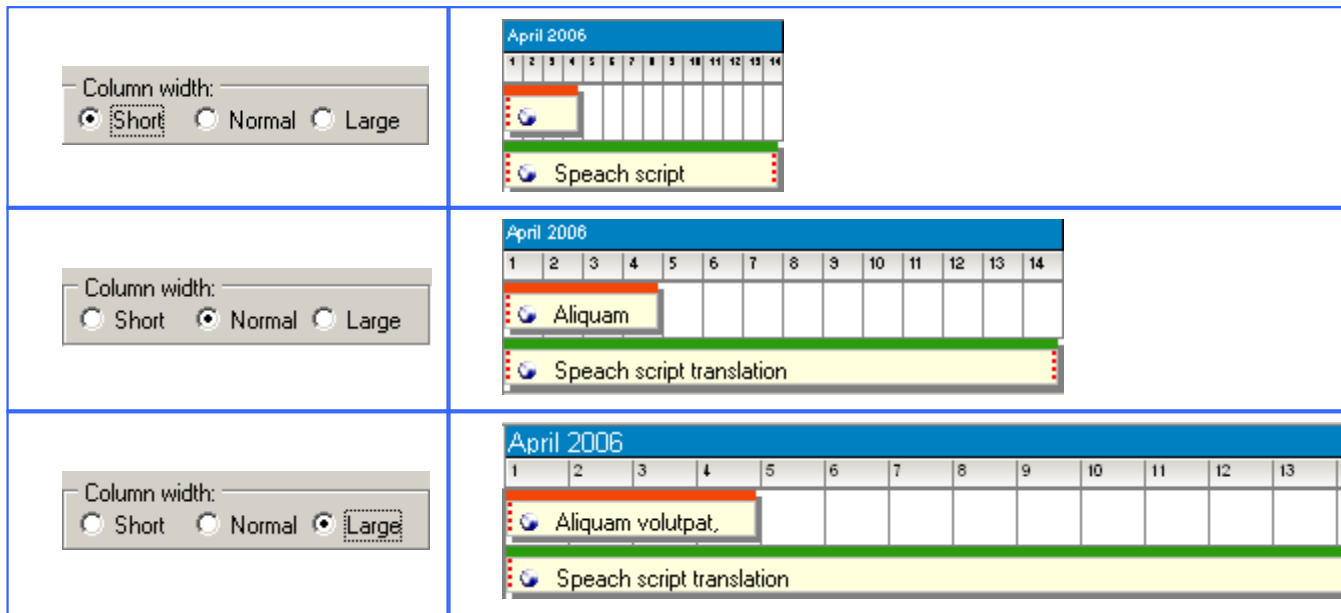


- You can change the calendar graduation using **Column Scale** drop-down list. Each calendar division can represent 1 hour/8 hours/12 hours/1 day:

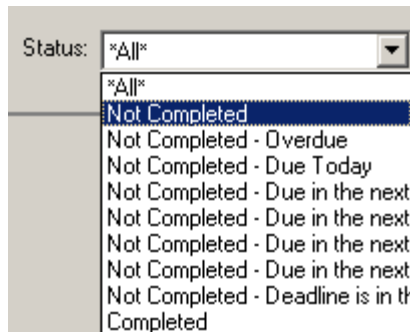


 **Note:** The set of available values for calendar graduation varies depending on the length of the **Selected Period**.

- You can customize the width of the calendar divisions using **Column width** options:



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



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

See Also:

Schedules: tracking the Jobs accomplishment

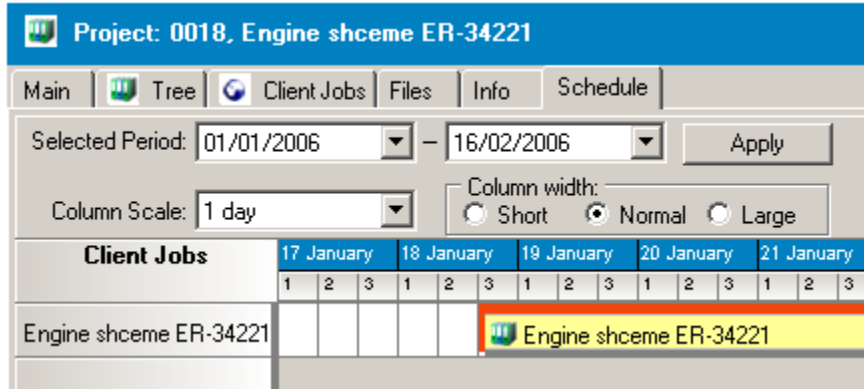
Schedule page of the Client window

Schedule page of the Project window

Schedule of Client Jobs window

11.3 Schedule page of the Projects window

Use this schedule to get the picture of all client jobs of the particular project. At a glance you can see what jobs need attention. Example:



To open a **Schedule** for a particular **Project**:

1. Click on the **Project** icon from the **Navigation** panel; switch to the **Main** tab.




2. Select the necessary **Project** from the **Projects** list on the **Main** tab:

Code	Project Name
0018	Engine scheme ER-34221
0019	Veni Vidi Vici
0020	Personal Letters
0021	Lorem Ipsum
0025	LS Drive - 1305m
0027	Aliquam
0033	ADS - User Guide



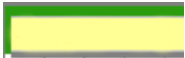

3. Switch to the **Schedule** tab of the **Project** window.

On the **Schedule** page of the **Project** window you can see all **Client Jobs** which fall into the scope of the selected period displayed as horizontal columns of different colors (depending on the **Job** status). The **Jobs Names** are written on the columns, the length of the columns depends on

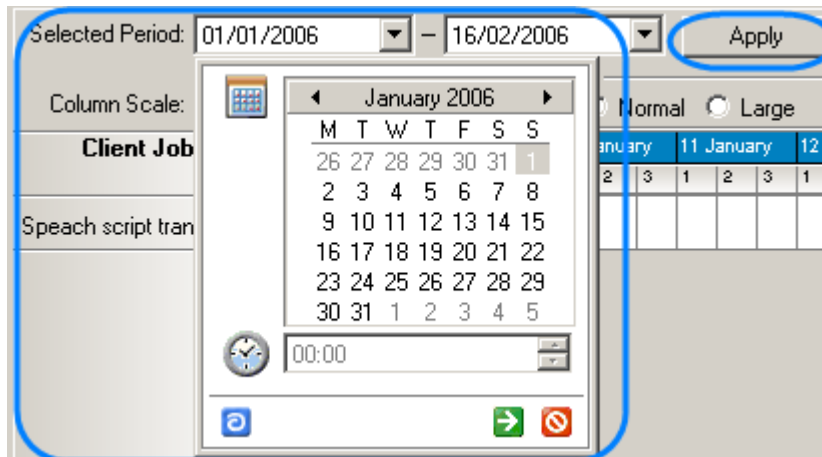
the **Job** timeline.

 **Note:** If the **Project Assigned**, **Deadline** or **Completed** date falls into the selected time interval, but its **Client Jobs** have other timeline, which does not intersect with the selected interval, the **Project** will not be displayed at all.

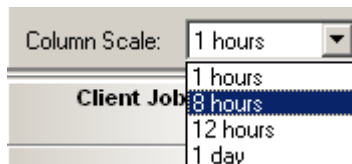
The color shading according to the **Job** status:


	Deadline was in the past, the Job is current and overdue.
	Deadline is later today.
	Deadline is in the future.
	The Job was overdue. The red crossed part are the days/hours after the deadline.

- To set the the time period use **Selected Period** drop-down calendars and click **Apply** button:

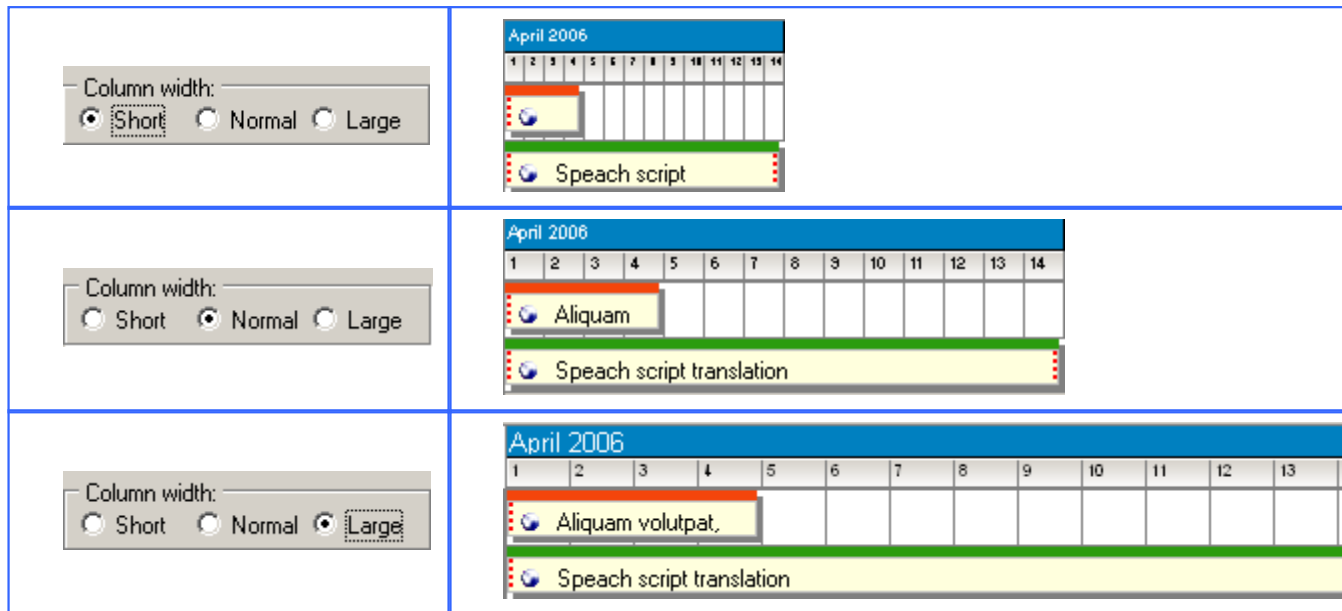


- You can change the calendar graduation using **Column Scale** drop-down list. Each calendar division can represent 1 hour/8 hours/12 hours/1 day:



 **Note:** The set of available values for calendar graduation varies depending on the length of the **Selected Period**.

- You can customize the width of the calendar divisions using **Column width** options:



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

See Also:

Schedules: tracking the Jobs accomplishment

Schedule page of the Client window

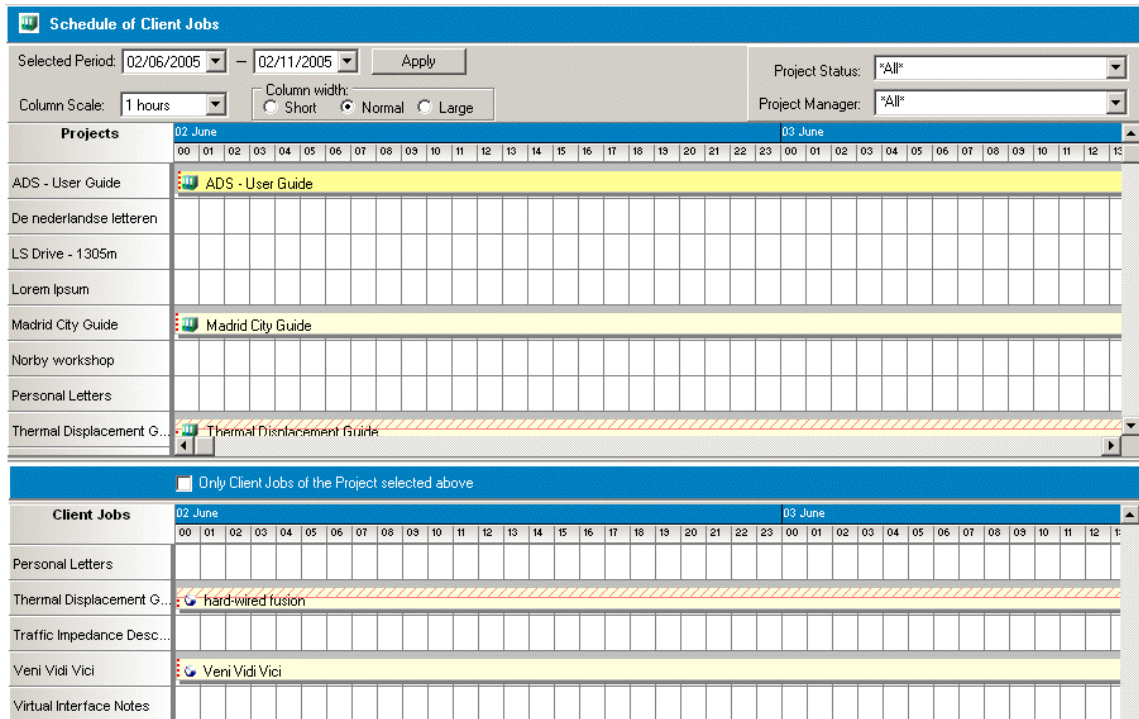
Schedule of Projects window

Schedule of Client Jobs window

11.4 Schedule of Client Jobs window

Use this schedule to get the picture of all projects (and client jobs within their scope) which fall into the selected time interval . At a glance you see what projects need immediate attention.

To open the **Schedule of Client Jobs** window click **Schedule of Client Jobs** icon from the **Navigation** panel or click menu **Settings > Schedule of Client Jobs**.




Schedule of Client Jobs page is separated into two parts: all **Projects** are displayed in the upper part; below you can see the **Client Jobs** from their scope.

If you select the **Only Client Jobs of the Project selected above** option, you can select the **Project** (select the horizontal column in the upper part of the window) and only **Jobs** of this project will be displayed in the lower, **Client Jobs** part of the window. For example:

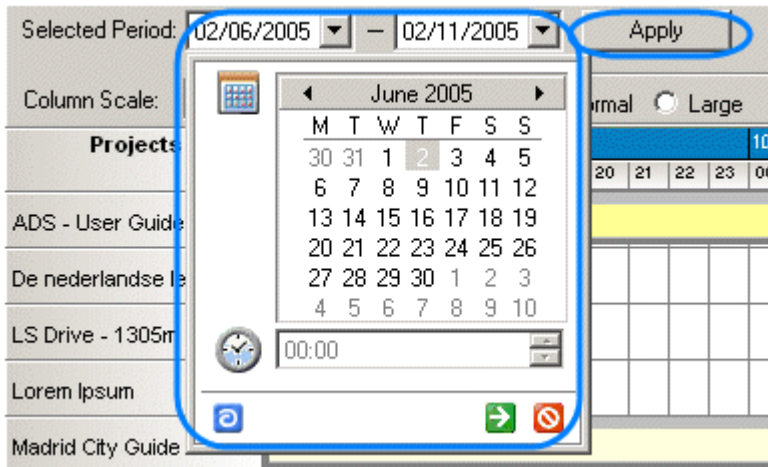
Projects	09 June											10 June								
	12	13	14	15	16	17	18	19	20	21	22	23	00	01	02	03	04	05	06	07
ADS - User Guide																				
De nederlandse letteren																				
LS Drive - 1305m																				
Lorem Ipsum																				
Madrid City Guide																				
Norby workshop																				
Personal Letters																				
Thermal Displacement G...																				
<input checked="" type="checkbox"/> Only Client Jobs of the Project selected above																				
Client Jobs	09 June											10 June								
	12	13	14	15	16	17	18	19	20	21	22	23	00	01	02	03	04	05	06	07
ADS - User Guide													ADS - User Guide Part 2							

The color shading according to the **Project/Job** status:

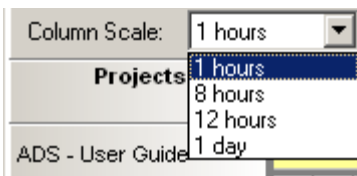
	Deadline was in the past, the Project/Job is current and overdue.
	Deadline is later today.
	Deadline is in the future.
	The Project/Job was overdue. The red crossed part are the days/hours after the deadline.

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

- To set the time period use **Selected Period** drop-down calendars and click **Apply** button:



- You can change the calendar graduation using **Column Scale** drop-down list. Each calendar division can represent 1 hour/8 hours/12 hours/1 day:



Note: The set of available values for calendar graduation varies depending on the length of the **Selected Period**.

- You can customize the width of the calendar divisions using **Column width** options:

<p>Column width:</p> <p><input checked="" type="radio"/> Short <input type="radio"/> Normal <input type="radio"/> Large</p>	
<p>Column width:</p> <p><input type="radio"/> Short <input checked="" type="radio"/> Normal <input type="radio"/> Large</p>	
<p>Column width:</p> <p><input type="radio"/> Short <input type="radio"/> Normal <input checked="" type="radio"/> Large</p>	

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

See Also:

Schedules: tracking the Jobs accomplishment

Schedule of Projects window

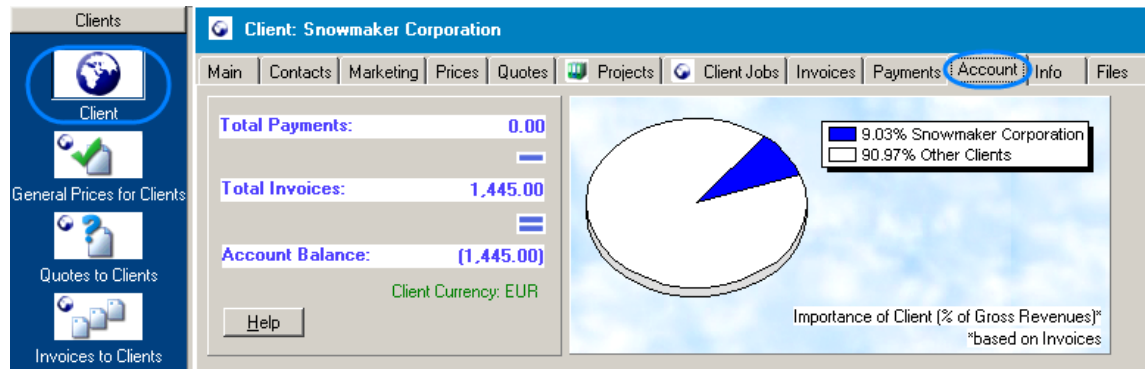
Schedule page of the Project window

Schedule page of the Client window

12 Accounts

Translation Office 3000 V8 provides you with the aggregated financial information about each **Client**, its value in the total gross revenue and the total numbers considering all **Clients**.

The total payments, total invoices, account balance for the particular **Client** and its importance basing on the gross revenues is displayed on the Account page of the Client window:




The total payments, total invoices and general balances information of all **Clients** and a table with individual accounts of each **Client** are displayed on the Accounts of Clients window:

Client	Currency	Invoices(B)	Payments(B)	Balance(B)
Alter Ego Solutions	EUR	0.00	5411.00	5411.00
Chameleon Decorations Corp.	USD	0.00	0.00	0.00
E-Mania Pharmacy	USD	0.00	0.00	0.00
Electric Dream Design	EUR	0.00	100.00	100.00
Forever Reflections Publishing	EUR	0.00	0.00	0.00
Mythology Development Company	EUR	0.00	0.00	0.00
Parallel Dimensions Travel Ltd.	USD	4023.24	3933.00	-90.24
Rainbow Chasers Community	JPY	0.00	0.00	0.00

12.1 Account page of the Client window

Account page of the **Client** window provides you with financial information concerning the total payments, total invoices and account balance for the particular **Client** (the **Client** is selected on the **Main** page of the **Client** window and its name is displayed in the window header); pie chart showing the importance of the client basing on the **Gross Revenues** is displayed.

 **Note:** The pie diagram is displayed only if there are **Invoices** to the **Client** in the database.


To open the **Client Account** page, click **Client** icon from the **Navigation** panel and then switch to the **Account** tab or click menu **Navigation > Client > Account**.

A general view of the page can be seen below:

Client: Snowmaker Corporation	
Total Payments:	0.00
Total Invoices:	1,445.00
Account Balance:	(1,445.00)
Client Currency: EUR	

Importance of Client (% of Gross Revenues)*	Value
9.03% Snowmaker Corporation	9.03%
90.97% Other Clients	90.97%

*based on Invoices

 **Note:** All **Invoices** and **Payments** of the **Client** are taken into account, independently of current settings of the Global Date Filter.

See Also: Accounts of Clients window

12.2 Accounts of Clients window

Accounts of Clients window displays the total payments, total invoices and general balances information of all **Clients** and a table with individual accounts of each **Client**.

To open the **Accounts of Clients** window click **Accounts of Clients** icon in the **Navigation** panel or select menu **Navigation > Accounts of Clients**.

The general view of the **Accounts of Clients** window:

The screenshot shows the 'Accounts of Clients' window with a navigation sidebar on the left. The main area displays summary statistics for all clients:

- Total Payments (All Clients): 10,275.80
- Total Invoices (All Clients): 12,365.73
- Gross Profit: (2,089.93)
- Business Expenses: 0.00
- Operating Profit: (2,089.93)

Below the summary is a table of individual client accounts. The 'View' dropdown is set to 'Base Currency: EUR'.

Client	Currency	Invoices(B)	Payments(B)	Balance(B)
Alter Ego Solutions	EUR	0.00	5411.00	5411.00
Chameleon Decorations Corp.	USD	0.00	0.00	0.00
E-Mania Pharmacy	USD	0.00	0.00	0.00
Electric Dream Design	EUR	0.00	100.00	100.00
Forever Reflections Publishing	EUR	0.00	0.00	0.00
Mythology Development Company	EUR	0.00	0.00	0.00
Parallel Dimensions Travel Ltd.	USD	4023.24	3933.00	-90.24
Rainbow Chasers Community	JPY	0.00	0.00	0.00

Note: For your convenience, only accounts with at least one **Invoice** or at least one **Payment** are displayed. It prevents cluttering the screen with display of many prospective **Clients** with zero accounts.

The very important detail of the **Accounts of Clients** window is the **View** drop-down list, where you select in which currency the information is displayed: your **Base Currency** or in the **Client Currencies**:



When the **Base Currency** is selected, all numbers for each **Client** are displayed in the **Base Currency** and the columns names are marked with letter "B":


The screenshot shows the 'Accounts of Clients' window with the 'View' dropdown set to 'Base Currency: EUR'. The table columns are highlighted with blue circles to show they are marked with 'B'.

Invoices(B)	Payments(B)	Balance(B)
0.00	5411.00	5411.00
0.00	0.00	0.00

Note: The total numbers for all **Clients** (in the upper part of the **Accounts of Clients** window) is displayed only if the **Base Currency** is selected.

If the **Client Currency** is selected in the **View** drop-down list, the **Invoices**, **Payment** and

Balance numbers for each client is displayed in its **Client Currency** and the total numbers for all **Clients** are not displayed.

 **Note:** Global Date Filter does not influence the results displayed on the **Accounts of Clients** window.

See Also: Account page of the Client window

13 Files and Folders

One of the **Translation Office 3000 V8** greatest benefits is an elaborated and well-composed folder structure. So all your business documentation is stored in one **Business** folder with a transparent and intuitive structure of subfolders, which can be quickly accessed from **TO3000**.

Business Folder, Clients and Projects Folders

Translation Office 3000 provides advanced tools for consistent, logical, easy-to-use and customizable organization of your business information.

Consistent folder structure for organizing all your business files is implemented through 3 levels.

Level 1: Business Folder.

Business Folder of **TO3000** is created automatically in the root of disk C. You can change its location on the **Folders** page of the **Advanced Settings** window. For consistency purposes name of this folder cannot be changed.

The main purpose of the **Business Folder** is to serve as single storage location for the folders of the second level: **Clients** folder and **Projects** folder.

Level 2: Clients and Projects Folders.

Business folder contains two subfolders: **Clients** and **Projects**.

Clients folder is purposed for storing the folders of each **Client**.

Projects folder is purposed for storing the folders of each **Project**.

Level 3: Folders for each Client and Project.

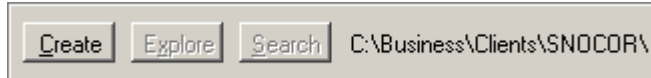
Folder of a particular **Client** always contains the **Marketing** folder. It also contains **Invoices** and **Profiles** folders, which are created automatically when **Profiles** and **Invoices** for this **Client** in RTF format are saved using **Save** or **Save&Open** commands. It can also contain any custom subfolders which will be automatically created together with the folder for the **Client**. This

subfolders can be specified on the Folders page of the Advanced Settings window.

For consistency purposes name of **Client Folder** is exactly the same as **Client Code** and cannot be modified.

➔ **Example:** if the client code is ESD, and **Business Folder** is located on drive C, the full path to **Client Folder** of this Client will be C:\TO3000\ESD.

You can create **Client Folder** manually from the **Files** page of the **Client** window or from **Client Profile** on the **Main** page of the **Client** window. Just click **Create** button and folder is created:

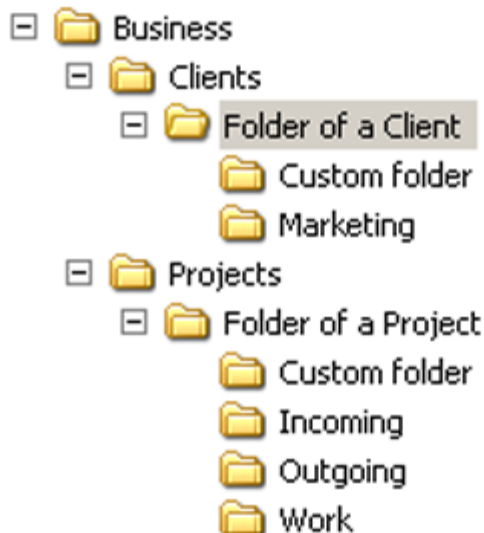


Client Folders are also created automatically when you save **Profile** or **Invoice** in RTF format from the **Edit** windows.

See Also: Files page of the Client window

Folder of particular **Project** always contains at least three folders: **Incoming** (where you can store the files sent you by the **Client**), **Work** (where you can store files while working on them) and **Outgoing** (where you can put files ready to be sent to the **Client**). It can also contain any custom subfolders which will be automatically created together with the folder for the **Project**. This subfolders can be specified on the Folders page of the Advanced Settings window.

The general view of the folders structure created by **Translation Office 3000 V8**:



See Also:

Files page of the Client window

Files page of the Project window

Client folders window

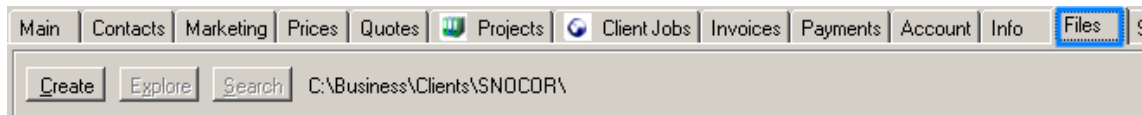
Project folders window

13.1 Files page of the Client window

Files page of the **Client** window provides you with possibility to create the client folder with one click, easily explore it and access [Windows Explorer](#) search.

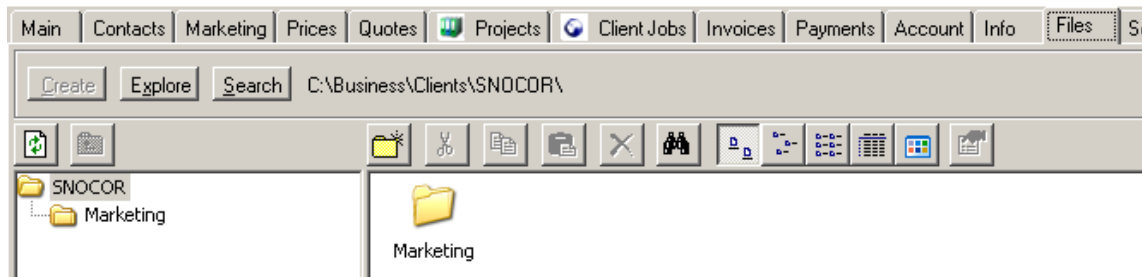
To open the **Files** page, open the **Client** window (clicking the **Client** icon from the **Navigation** panel) and then click **Files** tab or click menu **Navigation > Client > Files**.

The view of the **Files** page before the folder for the **Client** was created:



To create a client folder click **Create** button. Future location and the name of the folder is displayed on the right. For consistency purposes name of **Client Folder** is exactly the same as **Client Code** and cannot be modified.

The general view of the **Client Files** page after the **Client** folder was created:

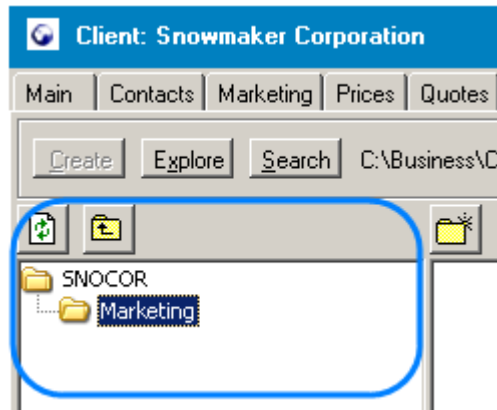



Note: **Marketing** subfolder of the **Client** folder is created automatically. You can specify custom subfolders to be created the automatically on the Folders page of the Advanced Settings window.


After the folder is created, **Explore** and **Search** buttons become active.

To open the client folder in a separate window click **Explore**. To open [MS Windows Search](#) click **Search** button.

In the left part of the **Client Files** page the structure of the **Client** folder is displayed now:



Click  button to reload the structure (after you have created new subfolders, for example).

Click  button to get to the higher level of the **Client** folder structure.

In the right part of the **Files** page of the **Client** window the content of the folder, selected on the left.

Use little square buttons with icons for management of sub folders of the client folder.



Starting from the very left:

- create new folder (in the client folder);
- cut the folder;
- copy the folder;
- paste the folder;
- delete the folder;
- open [MS Windows Search](#);
- Icons view;
- Titles view;
- List view;
- Details view;
- Thumbnails view;
- use it to open the Properties window for the selected folder.

See Also:

Client folders window

Files and Folders

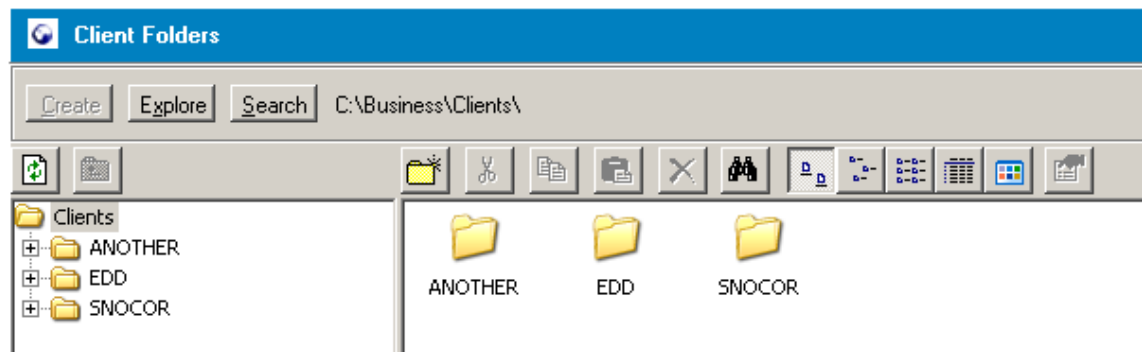
Files page of the Project window

Project folders window

13.2 Client Folders window

Client Folders window provides you with possibility to view and manage the content of the **Clients** folder, i.e. all your folders of **Clients**.

To open the **Client Folders** window click the **Client Folders** icon from the **Navigation** panel or click menu **Navigation > Client Folders**.



The **Client Folders** window is very similar to the **Files** page of the **Client** window, the only difference is that you can view all **Client** folders, not only the **Client** folder of a particular **Client**.

Please see Files page of the Client window for details.

See Also:

Files and Folders

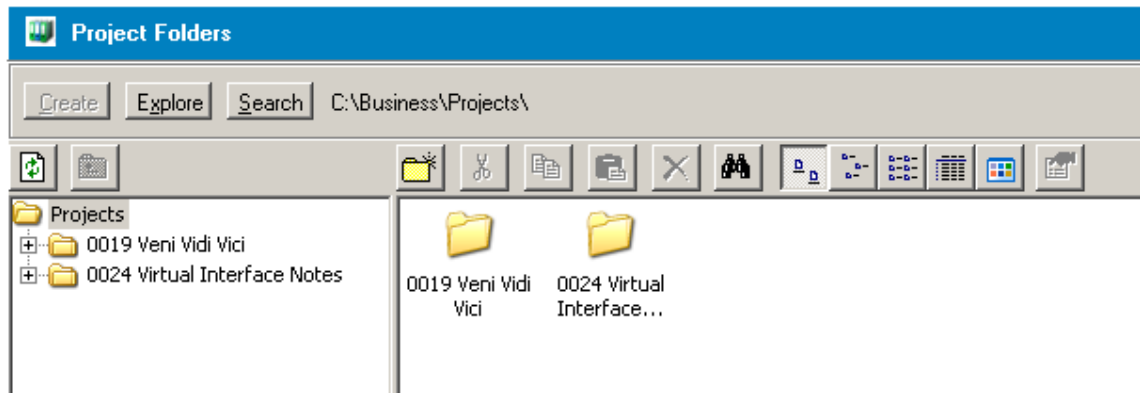
Files page of the Project window

Project folders window

13.3 Project Folders window

Project Folders window provides you with possibility to view and manage the content of the **Projects** folder, i.e. all your folders of **Projects**.

To open the **Project Folders** window click the **Project Folders** icon from the **Navigation** panel or click menu **Navigation > Project Folders**.



The **Project Folders** window is very similar to the **Files** page of the **Project** window, the only difference is that you can view all **Project** folders, not only the **Project** folder of a particular **Project**.

Please see Files page of the Project window for details.

See Also:

Files and Folders

Files page of the Client window

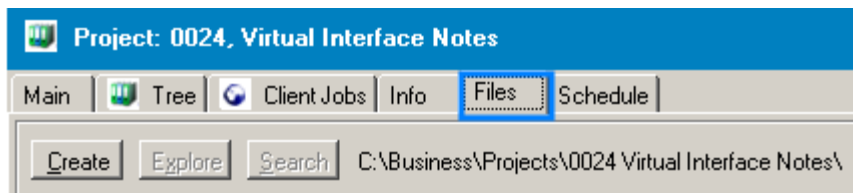
Client folders window

13.4 Files page of the Project window

Files page of the **Project** window provides you with possibility to create the client folder with one click, easily explore it and access **Windows Explorer** search.

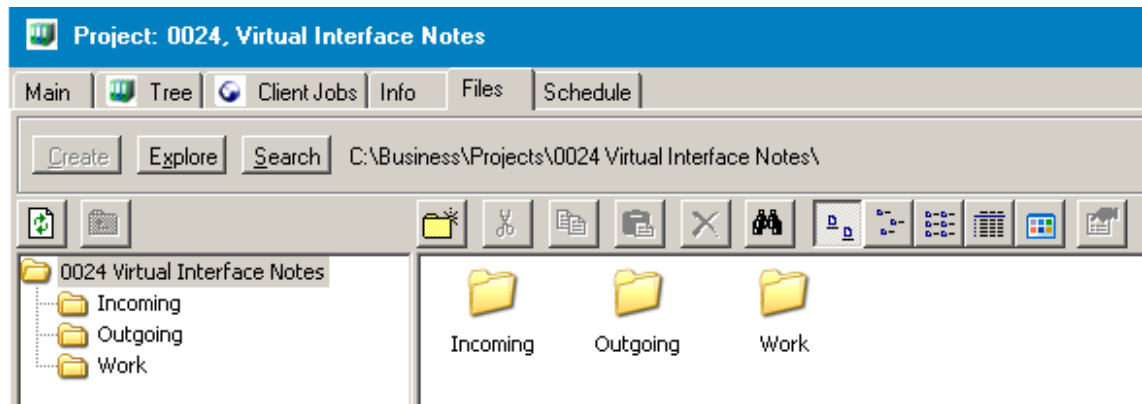
To open the **Files** page, open the **Project** window (clicking the **Project** icon from the **Navigation** panel) and then click **Files** tab or click menu **Navigation > Project > Files**.

The view of the **Files** page before the folder for the **Project** was created:



To create a client folder click **Create** button. Future location and the name of the folder is displayed on the right.

The general view of the **Project Files** page after the **Project** folder was created:

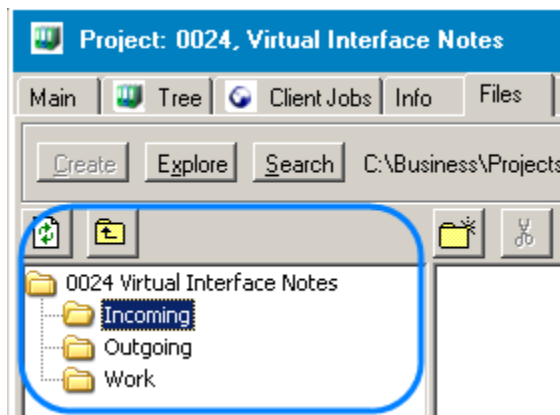



Note: **Incoming**, **Outgoing** and **Work** subfolder of the **Project** folder is created automatically. You can specify custom subfolders to be created the automatically on the Folders page of the Advanced Settings window.


After the folder is created, **Explore** and **Search** buttons become active.

To open the client folder in a separate window click **Explore**. To open **MS Windows Search** click **Search** button.

In the left part of the **Project Files** page the structure of the **Project** folder is displayed now:



Click  button to reload the structure (after you have created new subfolders, for example).

Click  button to get to the higher level of the **Project** folder structure.

In the right part of the **Files** page of the **Project** window the content of the folder, selected on the left is displayed.

Use little square buttons with icons for management of sub folders of the client folder.



Starting from the very left:

- create new folder (in the client folder);
- cut the folder;
- copy the folder;
- paste the folder;
- delete the folder;
- open [MS Windows Search](#);
- Icons view;
- Titles view;
- List view;
- Details view;
- Thumbnails view;
- use it to open the Properties window for the selected folder.

See Also:

[Project folders window](#)

[Files and Folders](#)

[Client folders window](#)

[Files page of the Client window](#)

14 Business Expenses

In the **Business Expenses** window you can register any additional expenses related to your business activity. You can export the list of **Expenses** to different formats using Local Report.

To open the **Business Expenses** window click on the **Business Expenses** icon from the **Navigation** panel or click menu **Navigation > Business Expenses**.

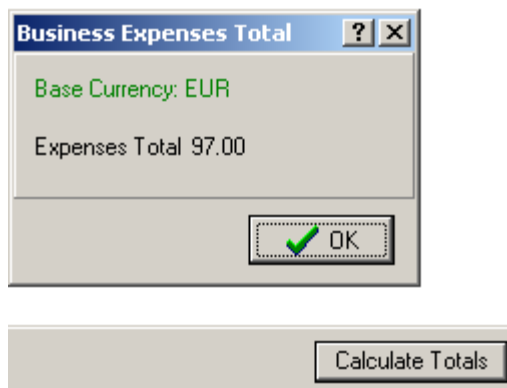
The general view of the **Business Expenses** window:

Business Expenses		
<input type="button" value="New"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/>		
Date	Value	Description
30/05/2006	29.00	ExactSpent by AIT (time-tracking tool)
22/10/2005	39.00	WinLexic by AIT (GUI to Microsoft Glossaries)
01/04/2006	29.00	AnyCount by AIT (word count tool)

 **Note:** The value of the expenses is in your **Base Currency** (it is displayed in the bottom right part of the window).

- To add a new **Expense** record click **New** button. The New Business Expense window will open, where you can enter the date, value and description of the expense (any other custom fields can also be added).
- To edit the existing **Expense** record select it from the list and click **Edit** button or just double-click the record. The Edit Business Expense window will open, where you can change the date, value, description or custom fields value.
- To delete the record select it from the list and click **Delete** button.

You can easily see the total sum of **Expenses** clicking **Calculate Totals** button in the bottom right corner of the **Business Expenses** window:

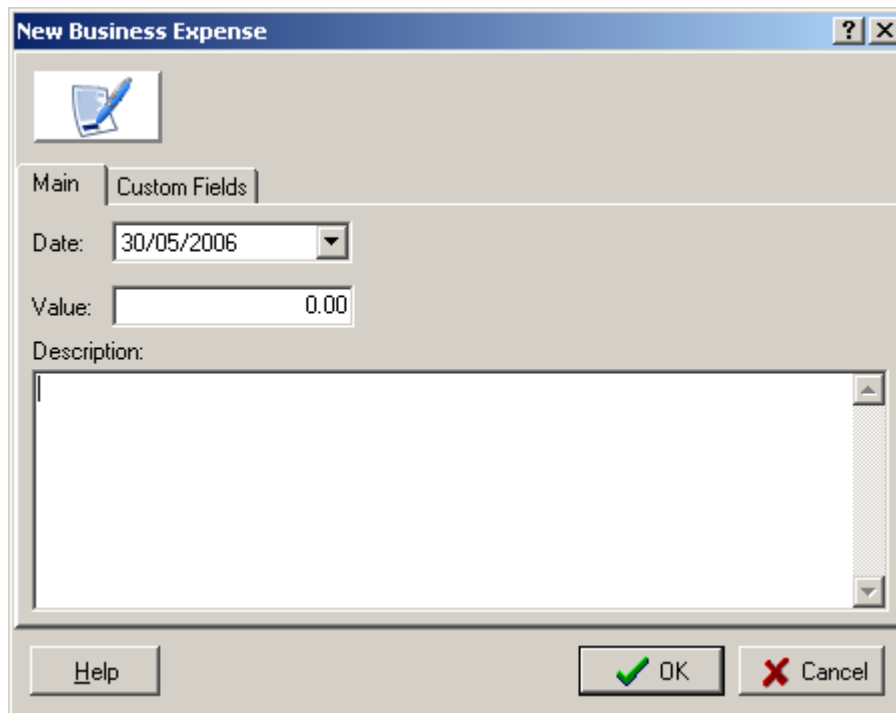


Right-clicking on the list you can select to see the selected record in a vertical view (thus all fields will be visible, no need to scroll), specify what columns to display and change their order. More details...

14.1 New Business Expense window

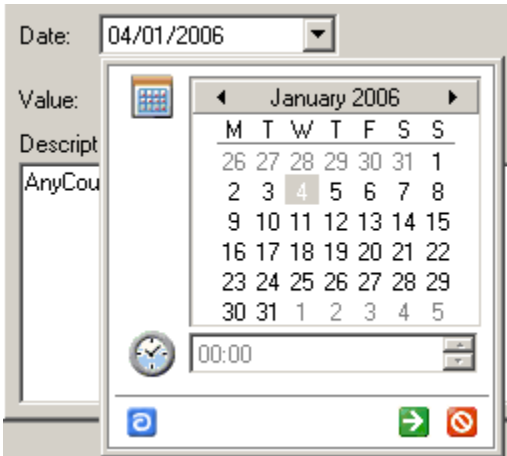
In the **New Business Expense** window you can enter the date, value and description of the expense. Or any other information if the correspondent **Custom Fields** were added.

To open the **New Business Expense** window click the **New** button from the Business Expenses window.




Main tab (of the New Business Expense window)

- Specify the date of the expense in the **Date** drop-down calendar:

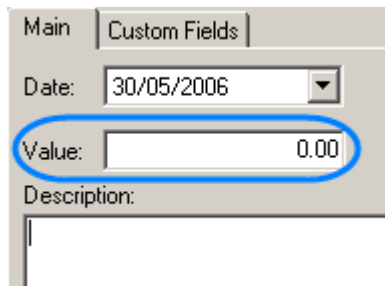


- To select the month, click the right and left arrows near the month name.
- To select the date, click the day number.

Click the little green icon to confirm the date set or the red icon to cancel.

 **Note:** Click the little blue icon to set the **Date** equal to the current date.

- Enter the amount of the expense in the **Value** field.




Main Custom Fields

Date: 30/05/2006

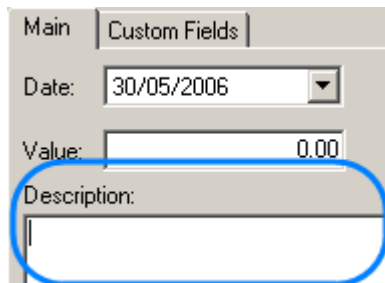
Value: 0.00

Description:

 **Note:** The **Value** field cannot be negative or null.

 **Note:** The value of the expenses is in your **Base Currency** (it is displayed in the bottom right part of the **Business Expenses** window).

- Describe the expense in the **Description** text field:



Main Custom Fields

Date: 30/05/2006

Value: 0.00

Description:

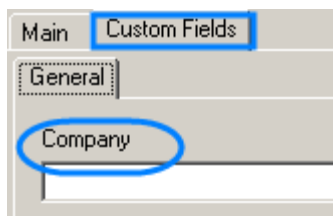
Custom Fields tab (of the New Business Expense window)

On the **Custom Fields** tab of the **New Business Expense** window **Custom Fields** for additional information on the expense are displayed.

While no **Custom Fields** were added, the tab looks this way:

Custom Fields can be added on the Custom Fields page of the Advanced Settings window.

For example, you can create a field with to specify the name of the company, where you bought the product or service (the **General** tab was created as well):



Main Custom Fields

General

Company

Having entered all necessary details about the expense click **OK** to add the **Expense** record to the database or click **Cancel** to discard.

See Also:

Personal Settings

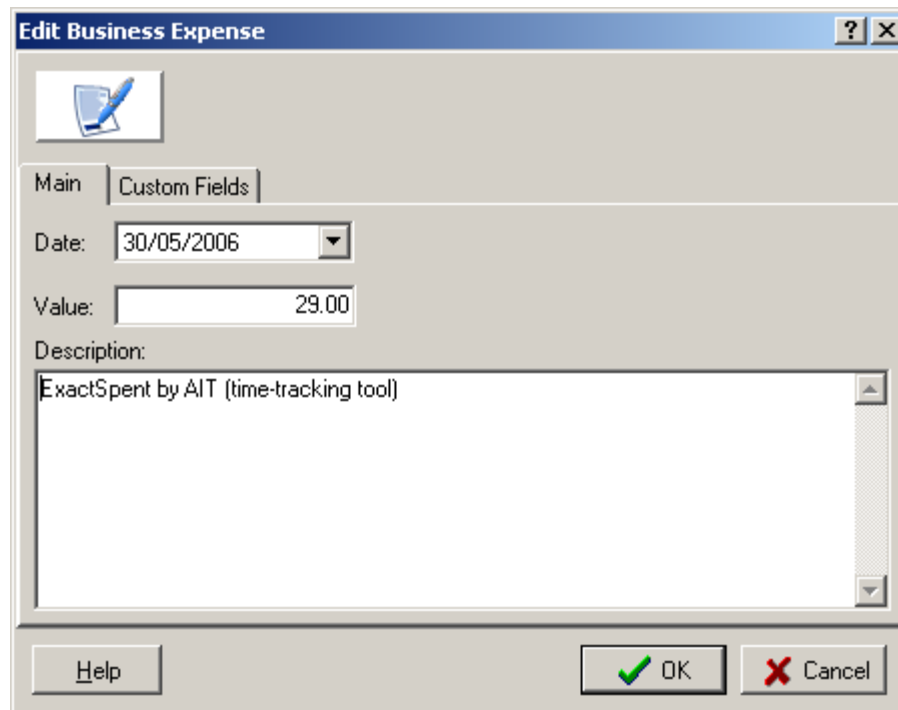
Business Expenses

14.2 Edit Business Expense window

In the **Edit Business Expense** window you can edit the expense details (date, value, description, custom fields value if any) specified when creating the **Business Expense** record.

To open the **Edit Business Expense** window for a particular record select the **Expense** record from the list and click **Edit** button in the **Business Expenses** window or double-click the record.

The general view of the **Edit Business Expense** window:



The screenshot shows a standard Windows-style dialog box titled "Edit Business Expense". It features a blue header bar with a question mark and close button. Below the header is a small icon of a notepad and pen. The main area is divided into two tabs: "Main" (selected) and "Custom Fields". Under the "Main" tab, there are three input fields: "Date:" with a dropdown menu showing "30/05/2006", "Value:" with a text box containing "29.00", and "Description:" with a large text area containing "ExactSpent by AIT (time-tracking tool)". At the bottom of the window, there are three buttons: "Help", "OK" (with a green checkmark icon), and "Cancel" (with a red X icon).

Working with **Edit Business Expense** window fields is absolutely similar to working with New Business Expense window.

See Also: Business Expenses

15 Multi-Currency Support

In [Translation Office 3000 V8](#) you can assign individual **Client Currency** to each **Client** and still be able to see ‘the whole picture’ using your **Base Currency**. This chapter will help you to understand how currencies are handled in [Translation Office 3000 V8](#).

First of all, let us give definitions for the terms used in this chapter:

Base Currency is the currency in which you make all internal accounting records, i.e. project balance, taxes, expenses etc. In most cases, it is the currency of your country.

Client Currency is the currency in which you produce invoices for your client and receive payments from your client.

➔ **Example:** If you live in Europe and your client is from USA, it is probable that your **Base Currency** will be Euro and the **Client Currency** will be US Dollar.

In [Translation Office 3000 V8](#) you can easily produce invoices and receive payments from clients and record them in client currencies, and [TO3000](#) will automatically make parallel records in the base currency of your company.

These parallel records in your **Base Currency** allow conducting all your internal accounting in your **Base Currency**, still keeping the records in other currencies.

To make these parallel records possible, you only have to enter currency exchange rates for the currencies of your clients. You may also easily change the currency rates for each recorded client job or for all future jobs.

Please see:

Your Base Currency

Currencies and Exchange Rates

Clients Currencies

Prices and job accounts in different currencies

General views of Client accounts

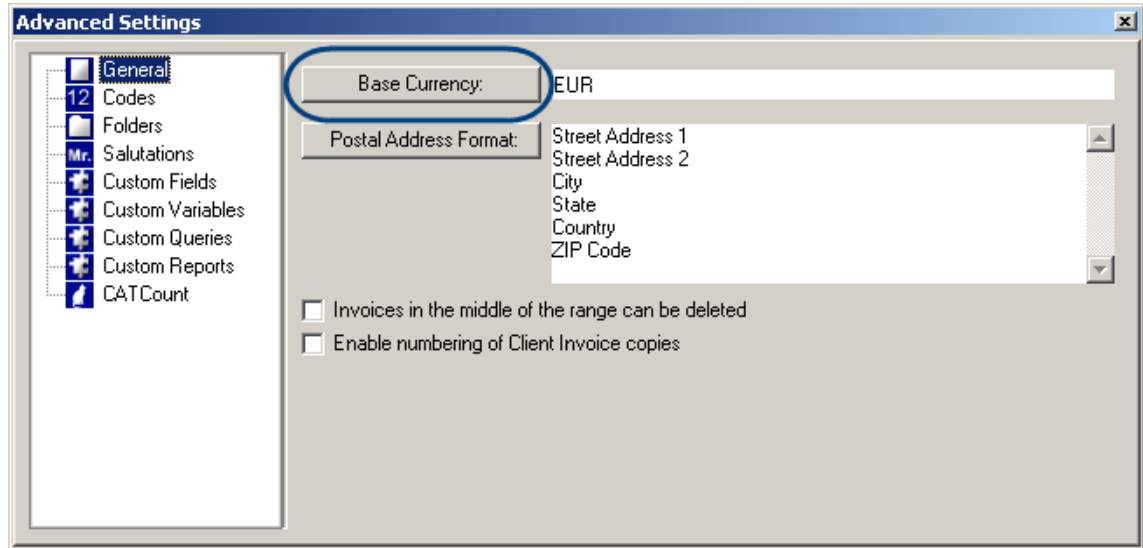
15.1 Your Base Currency

The first thing you have to do with your [Translation Office 3000 V8](#) is to define your Advanced Settings, i.e. define the service groups and the services you provide, your main currency, the discounts you may give, the taxes you pay, the units for measuring job volumes, and currency

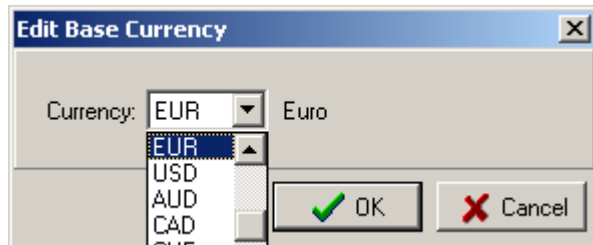
exchange rates.

Let us presume that you provide translation-related services and your main currency is EURO. The base currency is defined on the General page of the Advanced Settings of TO3000.

To open it click menu **Settings > Advanced**.



To set the **Base Currency**, click **Base Currency** button and select the necessary currency in the **Edit Base Currency** window:



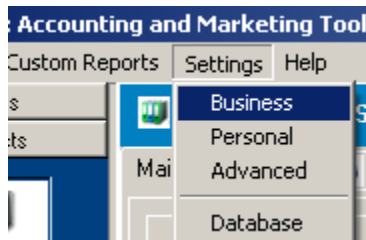
Please make sure that the base currency is correct before starting your work in [Translation Office 3000 V8](#).

See Also: Advanced Settings

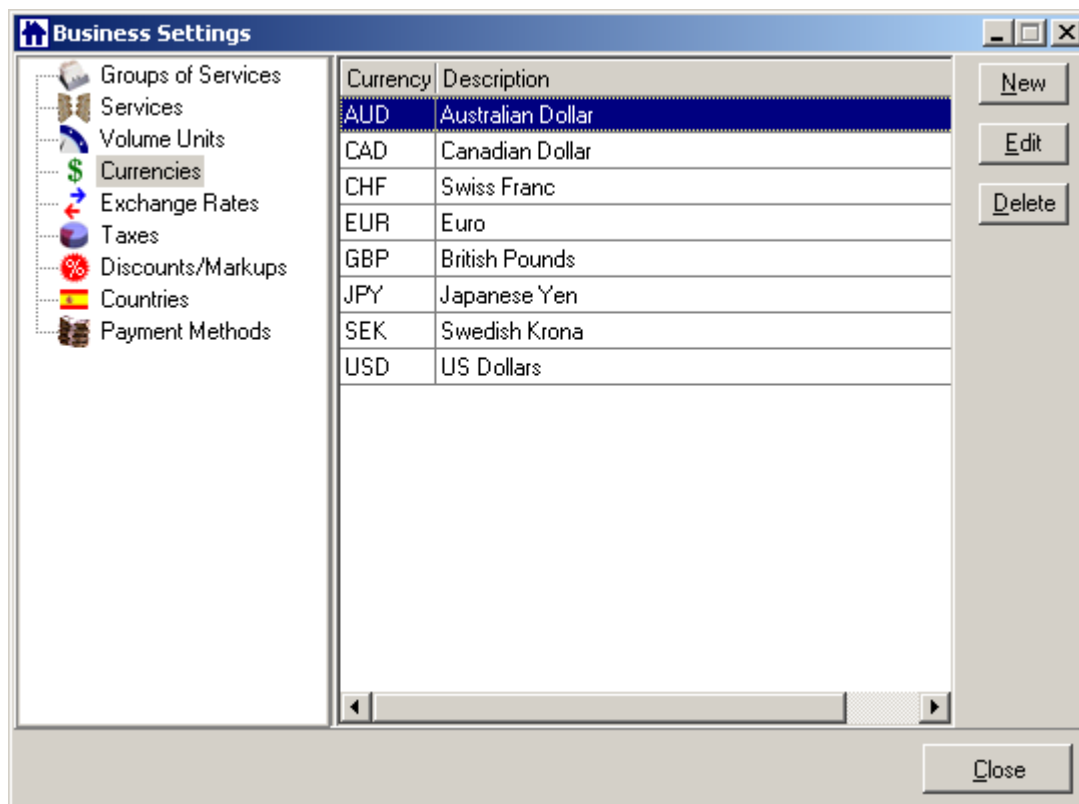
15.2 Currencies and Exchange Rates

Since the currencies of your clients may differ from yours, you will need to add new currencies to your TO3000 database and to define their exchange rates relating to your base currency.

To define currency settings, open **Settings** menu > **Business**.



In **Business Settings** window, click **Currencies**:

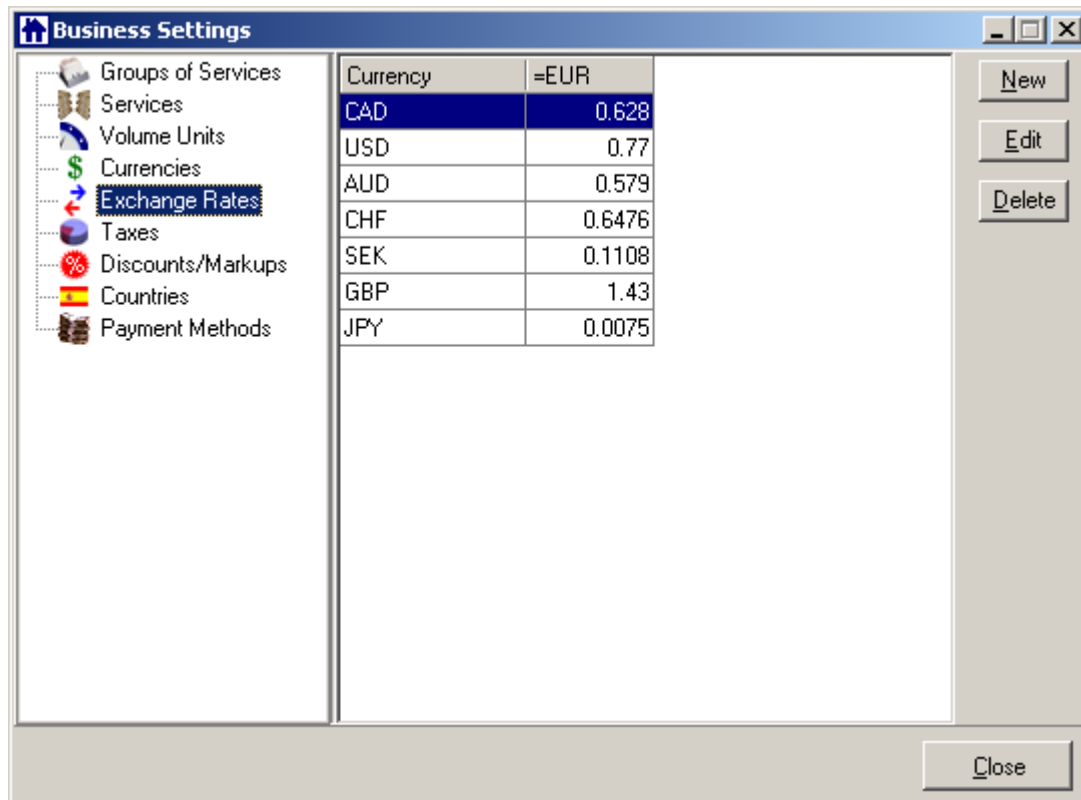


If some of the currencies you need are not included into the list, you may add them by clicking **New** button. You can also edit or delete the existing currencies.

When all the necessary currencies are in the list, you need to enter their exchange rates relating

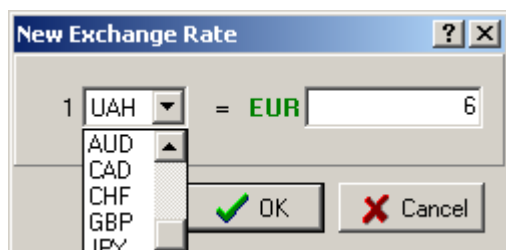
to your base currency.

In **Business Settings** window, click **Exchange Rates**:



To add new currency exchange rate, click **New** button.

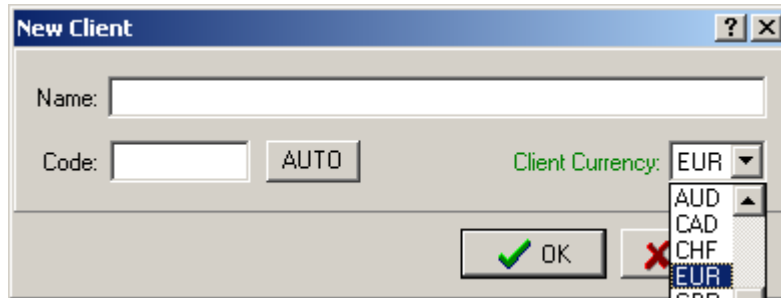
Select the currency from the drop-down list, enter its rate relating to your **Base Currency** (it is EUR on the screenshot) and click **OK**:




See Also: Business Settings > Currencies

15.3 Client Currency

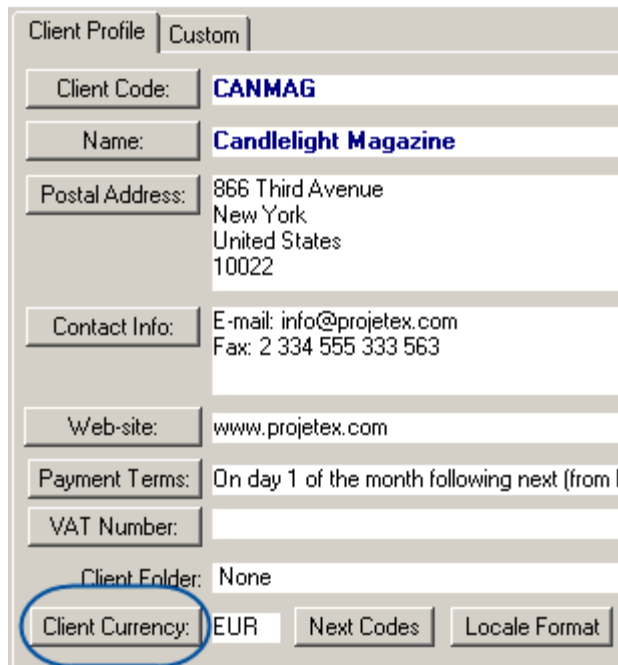
When you add new **Client** to your database, you define the **Currency** of this **Client**.



Remember that all the prices, quotes, invoices and payments related to the **Client** will be recorded in the currency you defined. That is why it is important to define the **Client Currency** before entering any financial records.

 **Note:** If you encounter a rare case when your transactions with particular **Client** involve more than one currency, you can create two separate **Client** records (for instance, if **Client** is **Alpha**, you can create **Alpha-USD** record with **Client Currency: USD** and **Alpha-EUR** record with **Client Currency: EUR**). This way this **Client/Expert** will have two separate accounts in your database, one for each **Currency**.

On **Main** page of **Client** window, you may change the currency of the **Client** by clicking **Client Currency** button:



It makes sense to modify the **Client Currency** only before first financial record for this **Client**

has been recorded (**Price**, **Quote**, **Job**, **Invoice** or **Payment**). However, in rare case when you have been entering the data meaning another currency, you can still change the **urrency** to the right one, after answering **Yes** to program warning.

See Also: Client window > Main page > Client Profile

15.4 Prices and job accounts in different currencies

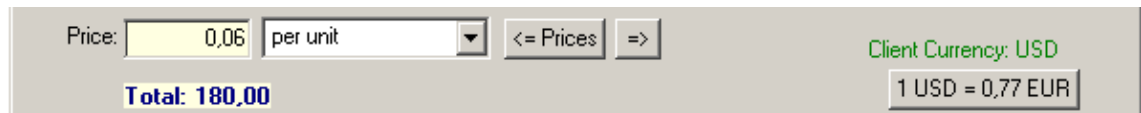
In **Translation Office 3000 V8** for each client you can specify his/her own currency for financial records. It may be different from your **Base Currency**.

When you enter the prices for your **Client** the **Currency** is displayed in the bottom left part of the **New/Edit Price** window:



Price: 0,12 (per unit)
Currency: EUR

When you create or edit a **Client Job**, the job cost (**Total**) is displayed in **lient Currency**:



Price: 0,06 per unit <=> Prices =>
Client Currency: USD
Total: 180,00 1 USD = 0,77 EUR

The **Client Currency** is indicated by green font to the right from the total. If the **Client Currency** differs from your **Base Currency**, you will also see **Currency Exchange Rate** button. By clicking this button, you may change the **Currency Exchange Rate** used in this **Job**. Please note that this button does not change general exchange rate stored in your **TO3000** database. To change exchange rate for all future jobs go to Exchange Rates page of the Business Settings.

 **Note:** If the **Job** is already added to the invoice, button with exchange rate will be disabled.

In **Job** list window, you can see the following columns:

Price	Price (B)	Job Total	Job Total (B)
0,08	0,0616	3200,00	2464,00
0,15	0,1155	1431,00	1101,87
15,00	11,55	375,00	288,75
23,00	17,71	529,00	407,33
0,06	0,0462	180,00	138,60
20,00	15,40	900,00	693,00
7,00	5,39	7,00	5,39
45,00	34,65	2520,00	1940,40
32,00	24,64	1088,00	837,76

Price: price per unit in client currency.

Price (B): price per unit in your base currency

Job Total: total cost of the job in client currency

Job Total (B): total cost of the job in your base currency

See Also:

Project Client Jobs page

Client Jobs window

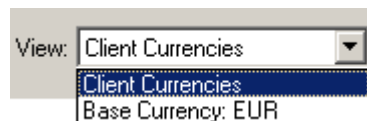
15.5 Currencies in Clients Accounts

You can view client accounts on the **Accounts of Clients** window.

To open the **Accounts of Clients** window click **Accounts of Clients** icon in the **Navigation** panel or select menu **Navigation > Accounts of Clients**.

On the **Accounts of Clients** window you may select to view all the accounts in currencies of your client or in your base currency.

To view the accounts in client currencies, select **Client Currencies** from **View:** drop-down list in the right part of the window.



To view the accounts in your base currency, select **Base Currency** from **View:** drop-down list in the right part of the window.


Accounts of Clients					
Total Payments (All Clients):		10,275.80			
Total Invoices (All Clients):		12,365.73			
Gross Profit:		(2,089.93)			
Business Expenses:		0.00			
Operating Profit:		(2,089.93)			
<input type="button" value="Help"/>		Base Currency: EUR		View: Base Currency: EUR	
Client	Currency	Invoices(B)	Payments(B)	Balance(B)	
Alter Ego Solutions	EUR	0.00	5411.00	5411.00	
Chameleon Decorations Corp.	USD	0.00	0.00	0.00	
E-Mania Pharmacy	USD	0.00	0.00	0.00	
Electric Dream Design	EUR	0.00	100.00	100.00	
Forever Reflections Publishing	EUR	0.00	0.00	0.00	
Mythology Development Company	EUR	0.00	0.00	0.00	
Parallel Dimensions Travel Ltd.	USD	4023.24	3933.00	-90.24	
Rainbow Chasers Community	JPY	0.00	0.00	0.00	

See Also: Accounts of Clients

16 Templates

16.1 Templates

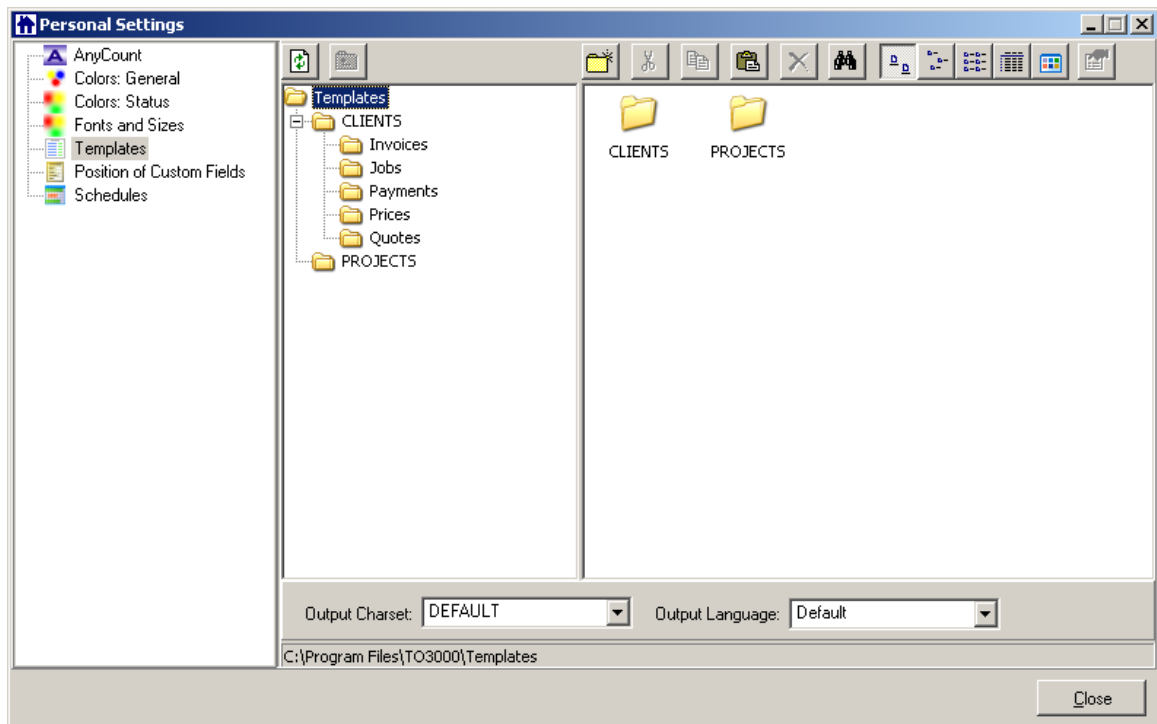
Documents (**Invoices**, **Quotes** etc.) issued with the help of TO3000 and other data from TO3000 database are based on .RTF templates.

 **Note:** Standard templates are supplied together with your copy of TO3000 at once. What makes TO3000 a really flexible freelancer accounting tool, is that .RTF templates are completely customizable (you can change formatting, language, font color, insert images etc.)

You can access and manage TO3000 .RTF templates from the **Templates** page of TO3000 **Personal** settings.

To open **Templates** window click menu **Settings > Personal** and select **Templates** page.

Templates page lists these templates organized in folders:



Translation Office 3000 V8 enables you to print **Invoices, Jobs, Payments, Prices, Profiles, Quotes** or save them as files, which can be opened in **Microsoft Word** or other compatible word processor. You can customize layout and details included in these files or printouts by adjusting **Templates**.

You can perform various file operations using toolbar buttons:



Simple rules for the beginners: you can change anything except variables, which have "\" (backslash) symbols in the beginning and in the end, e.g. `\CLIENT_NAME\`, `\CLIENT_STREET1\`, `\CLIENT_PHONE1\` etc.

Advanced users can learn about templates variables, add/delete them as necessary, customizing templates to the maximum.

Do not hesitate to write to support@translation3000.com if you ever need assistance in customizing templates to serve your tasks and requirements better. One of our team members

would be pleased to assist you.

We will regularly post new templates to Customer Support area of support@translation3000.com Web site.

If you have designed custom [TO3000](#) templates in English or translated some of them into your native language, and would like to share them with other users, feel free to send them to support@translation3000.com. We will make them available for download, with your name, language combination you work in, and link to your Web site.

See Also: Logic of Templates

16.2 Logic of Templates

This overview introduces you to three concepts used in [Translation Office 3000 V8](#) templates:

- variables;
 - data scan commands
 - condition commands.
-

Variables

All variables and commands are marked by \ (backslash) sign in the beginning and in the end. In example below you can see [\CLIENT_NAME\](#), [\CLIENT_STREET1\](#) and [\CLIENT_PHONE1\](#) variables:

To: [\CLIENT_NAME\](#)

Address: [\CLIENT_STREET1\](#)


Phone: [\CLIENT_PHONE1\](#)

When you use this template by clicking on **Save** or **Print** in some dialog box, [\CLIENT_NAME\](#) variable will be replaced by name of currently selected **Client**, [\CLIENT_STREET1\](#) - by **Client's Street Address** and [\CLIENT_PHONE1\](#) - by **Client's Phone Number**. The final output will look like this:

To: XYZ Company

Address: Elm street, 1

Phone: +1 212 898 11 31

 **Note:** Numerical values sometimes are surrounded by [fnum](#) command. This command simply tells the parser to round up the value to specified number of digits after decimal point (2 digits in the example below):

Job Total:

[\fnum\(dtLinkJobs:TOTAL, 2\)\](#)

Data Scan commands

Another concept you need to understand while working with templates is **Data Scan** commands:

\scan(dtLinkJobs)\			
PO No.	Delivered	Job Name	Service
\scanentry\			
\dtLinkJobs:PO\ D\	\dtLinkJobs:COMPLETE D\	\dtLinkJobs:JOB_NAM E\	\dtLinkJobs:SERV ICE\
\scanfooter\ Jobs Total: JOBS_TOTAL\			

In the example above `\scan(dtLinkJobs)\` means that, during saving or printing operation parser will 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.

Everything between `\scan(dtLinkJobs)\` command and `\scanentry\` command constitutes header and will be saved (or printed) only once per data table.

Everything between `\scanfooter\` and `\endscan\` commands is recognized as footer and also saved (or printed) only once per data table.

Body of table is contained between `\scanentry\` and `\scanfooter\` commands. It includes variables from columns you would like to be listed in the table. In example above these are:

`\dtLinkJobs:PO\` - **PO Number**.

`\dtLinkJobs:COMPLETED\` - **Date of Job Delivery**.

`\dtLinkJobs:JOB_NAME\` - **Name of the Job**.

`\dtLinkJobs:SERVICE\` - **Service provided**.

“`dtLinkJobs:`” – prefix. Not valid without column name. Add separator (“:” - semicolon) before column names. Column names are variables described in next chapters.

“`\scan(dtLinkJobs)`” – command to scan table with **Jobs**. Put before table with **Jobs**.

“`\scanentry\`” – start of scan.

Insert table header between `\scan(dtLinkJobs)\` and `\scanentry\`.

Insert data-columns only after `\scanentry\`.


Insert `\endscan\` after data-columns.

➔ **Example of data-columns:**

Payments received:

Payments received:

Code	Date	Total	This Invoice
<code>\scantentry\</code>			
<code>\dtLinkPayments: CPAYM_CODE\</code>	<code>\dtLinkPay ments: CPAYM_D ATE\</code>	<code>\dtLinkPaym ents: CPAYM_T OTAL\</code>	<code>\dtLinkPayme nts: LINK_SUM\</code>
<code>\endscan\</code>			

 **Note:** You can include special `noeof` parameter to scan command. With `noeof` parameter, when data table is empty, header and footer are not printed. For instance, in the example above, if your **Invoice** includes only **Jobs** and no expenses, the header and footer for **Expenses** will not be saved/printed. Such algorithm prevents producing unnecessary empty tables in the documents.

Condition checking

Third and last concept used in **Templates** is condition checking:

`\IF(DISCOUNT1)\`

`\DISCOUNT1NAME:\DISCOUNT1VALUE\`

Subtotal: `\AFTERDISCOUNT1\endif\`

`DISCOUNT1` is a logical variable, i.e. it can have one of two values: either true or false. In this particular case, **Translation Office 3000 V8** sets `DISCOUNT1` into true if first discount is present and into false, if there is no first discount.

When `\IF(DISCOUNT1)\` is encountered in template, parser checks `DISCOUNT1` logical value, and if it is true, runs the code below this command, until `\endif\` is encountered, which instructs parser to stop. If `DISCOUNT1` is false, everything until `\endif\` command is skipped.

In this particular case, without `\IF(DISCOUNT1)\` command, the parser would output empty string with: and empty **Subtotal:** in cases when there would not be discount. But with `\IF(DISCOUNT1)\` command, in such cases above block is skipped in its entirety.

In other topics of **Templates** chapter you can find the list of common template variables, available in all parts of **Translation Office 3000 V8**, and specific variables, which have limited availability.

16.3 Common Template Variables

There are three categories of common variables accessible in all templates:

- User Information Variables;
- Client Information Variables;
- Client Currency Variable.

User Information Variables

VARIABLE:	DESCRIPTION:
\COMPANY_NAME\ or \USER_NAME\	User Name taken from TO3000 License Key, cannot be modified within program. (Please contact us at support@to3000.com if you need to change the registration name)
\COMPANY_CURRENCY\ or \USER_CURRENCY\	Your Base Currency. The currency you prefer to receive payments in.


Date Variables

VARIABLE:	DESCRIPTION:
\DATE\ or \DATE_LONG\ or \LONGDATE\	Date in short format (for example, 10/4/2006) Date in long format (for example, Monday, October 04, 2006)

Client Information Variables

This set is available in all templates where single **Client** is known (all templates except **Profile** templates when used in **Master Profile**):

VARIABLE:	DESCRIPTION:
\CLIENT_NAME\	Name of the client document was produced for.
\CLIENT_CODE\	Code of the client document was produced for.
\CLIENT_CURRENCY\	Currency of the client document was produced for.
\CLIENT_MINFEE\	Minimum fee of the client document was produced for.
\CLIENT_PAYMENT_TERMS\	Payment terms of the client document was produced for.
\CLIENT_PAYMENT_TERMS_NOTES\	Additional notes on payment terms of the client document was produced for.
\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 the client document was produced for.
\CLIENT_STREET2\	Street address 2 (if available) of the client document was produced for.
\CLIENT_CITY\	City of the client document was produced for.
\CLIENT_STATE\	State of the client document was produced for.
\CLIENT_COUNTRY\	Country of the client document was produced for.
\CLIENT_ZIP\	ZIP of the client document was produced for.
\CLIENT_EMAIL1\	Email of the client document was produced for.
\CLIENT_EMAIL2\	Email 2 (if available) of the client document was produced for.
\CLIENT_PHONE1\	Phone number of the client document was produced for.
\CLIENT_PHONE2\	Phone number 2 (if available) of the client document was produced for.
\CLIENT_PHONE3\	Phone number 3 (if available) of the client document was produced for.
\CLIENT_PHONE4\	Phone number 4 (if available) of the client document was produced for.
\CLIENT_FAX\	Fax number of the client document was produced for.
\CLIENT_WEB\	Web site address of the client document was produced for.
\CLIENT_MINFO\	Application information of the client document was produced for.
\CLIENT_MWEB\	URL (Web page address) for application submission / information.
\CLIENT_INFO\	General Information about the client document was produced for.
\CLIENT_VATNUM\	VAT Number of the client document was produced for.

 **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.

Client Currency Variable

\CLIENT_CURRENCY\ variable always contains **Client Currency** of the currently selected **Client**.

See Also: Logic of Templates

16.4 Project Template Variables

Project Template Variables

VARIABLE:	DESCRIPTION:
\PROJECT_NAME\	Name of the Project .
\PROJECT_CODE\	Project code.
\PROJECT_CLIENT_NAME\	Client the Project created for.
\PROJECT_CLIENT_CODE\	Client reference number.
\PROJECT_INFO\	Information about the Project .
\PROJECT_DATE_STARTED\	Date when the Project was started in following format: 10/4/2006.
\PROJECT_DATE_DEADLINE\	Project deadline in following format: 10/4/2006.
\PROJECT_DATE_COMPLETED\	Date of the Project completion in following format: 10/4/2006.

\PROJECT_DATE_STARTED_LONG\ 	Date when the Project was started in following format: Monday, October 04, 2006.
\PROJECT_DATE_DEADLINE_LONG\ 	Project deadline in following format: Monday, October 04, 2006.
\PROJECT_DATE_COMPLETED_LONG\ 	Date of the Project completion in following format: Monday, October 04, 2006.

See Also: Logic of Templates

16.5 Contacts Template Variables

Contacts Template Variables

CONTACTS	
\SALUTATION\ \SAL\ \CONTACT_SALUTATION\ 	For example: "Mr.", "Ms.", "Mrs." etc.
\CONTACT_TITLE\ \TITLE\ 	Contact title.
\CONTACT_NAME\ \PM_NAME\ \ATTENTION\ 	Contact name.
\CONTACT_EMAIL1\ 	Contact email address.
\CONTACT_EMAIL2\ 	Contact email address 2 (if available).
\CONTACT_PHONE1\ 	Contact phone number.
\CONTACT_PHONE2\ 	Contact phone number 2 (if available).
\CONTACT_FAX\ 	Contact fax number.
\CONTACT_NOTES\ 	Contact notes.

See Also: Logic of Templates

16.6 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.

QUOTES	
\QUOTE_NAME\ \	Possible Quote name.
\QUOTE_CODE\ \CODE\ \	Quote code.
\SERVICE\ \	Service name.
\REQUEST\ \	Request for the Quote .
\ANSWER\ \	Answer to request for the Quote .
\VOLUME\ \	Quote volume.
\PRICING\ \TYPE\ \	Fee 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.

\COMPLETION_LONG\ \LONGESTCOMPLETION\ \	Deadline date in following format: Monday, October 04, 2006.
\COUNT_NOTES\ \	CATCount notes.
\STATUS\ \	Status of the Quote (Unknown, Accepted, Rejected)

See Also: Logic of Templates

16.7 Client Jobs Template Variables

Variables for templates from **New/Edit Job** dialog box allow you to construct document templates either for your reference during work process or for confirming job details to client.

CLIENT JOB	
\JOB_NAME\ \	Job name.
\JOB_CODE\ \CODE\ \	Job code.
\PO_CODE\ \PO\ \	Purchase order Client issued for this Job .
\CLIENT_REF\ \	Client reference number in accounting system of Client .
\SERVICE\ \	Service name.
\INSTRUCTIONS\ \	Job instructions.
\WORK_NOTES\ \	Work notes.
\VOLUME\ \	Job volume.
\PRICING\ \TYPE\ \	Fee type (for example: per unit, flat fee, free)
\PRICE\ \	Job price.
\UNITS\ \	Job units.
\TOTAL\ \	Job total.
\ASSIGNED\ \	Date when the Job was assigned in following format: 10/4/2006.

\ASSIGNED_LONG\ \LONGASSIGNED\ \DEADLINE\ \DEADLINE_LONG\ \LONGDEADLINE\ \COMPLETED\ \DONE\ \COMPLETED_LONG\ \LONGCOMPLETED\ \COUNT_NOTES\ \INVOICE_CODE\ \INVOICE\ \INVOICE_GLOBAL_CODE\ \INV_GLOBAL	Date when the Job was assigned in following format: Monday, October 04, 2006. Job deadline in following format: 10/4/2006. Job deadline in following format: Monday, October 04, 2006. Completion date in following format: 10/4/2006. Completion date in following format: Monday, October 04, 2006. CATCount or AnyCount notes. Invoice code. Invoice global code.
--	---

See Also: Logic of Templates

16.8 Invoice Template Variables

Dataset:

DATASET WITH COLUMN NAME	DESCRIPTION
\DTLINKJOBS:CJOB_PONUMB\ \DTLINKJOBS:CJOB_NAME\ \DTLINKJOBS:CJOB_ASSIGNED\ \DTLINKJOBS:CJOB_DEADLINE\ \DTLINKJOBS:CJOB_ISCOMPLETED\ \DTLINKJOBS:CJOB_COMPLETED\ \DTLINKJOBS:CJOB_PRICE\ \DTLINKJOBS:CJOB_VOLUME\ \DTLINKJOBS:CJOB_FEE_KIND	Client PO Job Name Assigned Deadline Completed (Boolean: True/False) Completed Unit Price Volume Pricing

\DTLINKJOBS:CJOB_RATE\	Exchange Rate
\DTLINKJOBS:CJOB_TOTAL\	Job Total
\DTLINKJOBS:CJOB_INSTRUCTION\	Instructions
\DTLINKJOBS:CJOB_WORKNOTES\	Work Notes
\DTLINKJOBS:CJOB_COUNTNOTES\	Count Notes
\DTLINKJOBS:SERV_NAME\	Service
\DTLINKJOBS:UNIT_NAME\	Units
\DTLINKJOBS:PROJ_CODE\	Project Code
\DTLINKJOBS:CJOB_CODE\	Job Code

INVOICE	
\STATUS\	Invoice status (For example: "Expected within 30 days", "Settled 5 days earlier" etc.)
\DATE_DUE\ \SETTLEMENT_DATE\ \DUE_DATE\	Date when the Invoice is due in following format: 10/4/2006.
\DATE_DUE_LONG\ \SETTLEMENT_LONGDATE\ \DUE_DATELONG\	Date when the Invoice is due in following format: Monday, October 04, 2006.
\INVOICE_DATE\ \INV_DATE\	Date the Invoice was sent in following format: 10/4/2006.
\INVOICE_DATE_LONG\ \INVOICE_LONGDATE\	Date the Invoice was sent in following format: Monday, October 04, 2006.
\INVOICE_CODE\ \INV_CODE\	Invoice code
\INVOICE_GLOBAL_CODE\ \INV_GLOBAL\ \INV_GLOBALLONG\	Invoice global code.
\INVOICE_TOTAL\ \INV_TOTAL\	Invoice total.

\JOBS_TOTAL\ \JOBSTOTAL\	Jobs total.
\TAX1\ \TAX\	Used in algorithms (If Tax1 is set = True, if it does not = False)
\TAX1_NAME\ \TAX1NAME\ \TAXNAME\	Tax1 name.
\TAX1_VALUE\ \TAX1VALUE\ \TAXVALUE\	Tax1 value.
\TAX2\ \TAX\	Used in algorithms (If Tax2 is set = True, if it does not = False)
\TAX2_NAME\ \TAX2NAME\	Tax2 name.
\TAX2_VALUE\ \TAX2VALUE\	Tax2 value.
\DISCOUNT1\ \DISCOUNT\	Used in algorithms (If Discount1 is set = True, if it does not = False)
\DISCOUNT1_NAME\ \DISCOUNTNAME\ \DISCOUNT1NAME\	Discount1 name.
\DISCOUNT1_VALUE\ \DISCOUNT1VALUE\ \DISCOUNTVALUE\	Discount1 value.
\DISCOUNT2\ \DISCOUNT\	Used in algorithms (If Discount2 is set = True, if it does not = False)
\DISCOUNT2_NAME\ \DISCOUNT2NAME\	Discount2 name.
\DISCOUNT2_VALUE\ \DISCOUNT2VALUE\	Discount2 value.
\TAXES\ \TAXES\	Used in algorithms (If any tax is set = True, if they are not = False)
\DISCOUNTS\ \DISCOUNTS\	Used in algorithms (If discounts exist = True, if there are no = False)

\AFTER_DISCOUNT1\ \AFTERDISCOUNT1\ \AFTERDISCOUNT\ \NET_JOBS_TOTAL\ \NETJOBSTOTAL\ \AFTER_TAX1\ \AFTERTAX1\ \INV_DUE\ \INVOICE_DUE\ \INV_PAID\ \INVOICE_PAID\ \INV_IS_PAID\ 	Total after Discount1 applied. Jobs total with discounts applied. Total after Tax1 applied. Balance due. Sum paid by this Invoice . Used in algorithms (If the Invoice is paid = True, if it's not = False)
--	---

See Also: Logic of Templates

16.9 Payments Template Variables

Payments Template Variables

\PAYMENT_CODE\ \CODE\ \PAYMENT_DATE\ \DATE\ \PAYMENT_DATE_LONG\ \PLONGDATE\ \TOTAL_PAID\ \TOTAL\ \NOT_LINKED\ \LINKED\ \IS_LINKED\ 	Payment code. Date the Payment received in following format: 10/4/2006. Date Payment received in following format: Monday, October 04, 2006. Total paid. Amount not linked with Invoices . Amount linked with Invoices . Used in algorithms (If Payment is linked with Invoice = True, if it's not = False)
--	--

\\PAYMENT_NOTES\ NOTES\	Payment Notes
----------------------------	----------------------

See Also: Logic of Templates

17 AnyCount

AnyCount is advanced software, which produces automatic word counts and counts in other volume units (characters with spaces, characters without spaces, lines, pages, custom units) for all common file formats.

Translation Office 3000 V8 is equipped with latest version of **AnyCount** to quicken and simplify job creation and expenses calculation for each job.

AnyCount 5.0 produces automatic word counts and counts in other volume units (characters with spaces, characters without spaces, lines, pages, custom units) for all common file formats: .RTF, .DOC, .WPD, .XLS, .PPT, .PPS, .PDF, .CSV, .HTM, .HTML, .XML, .MIF, .TXT, .ZIP.


AnyCount is accessible when creating new jobs and quotes: from **New/Edit Draft Client Job**, **New/Edit Client Job** and **Project Tree** page.


Let us take a closer look on using **AnyCount** in **Translation Office 3000 V8** on the example of using it when creating a **Client Job**.

When you open **New Client Job** window you specify the job name, group and service at first. **AnyCount** comes at a hand when you need to specify the volume of the job and thus the job cost. For example, you can count the source file for translation and count results will be automatically entered to the **Volume** field.

To count using AnyCount:

1. Select the volume units from the corresponding drop-down list.

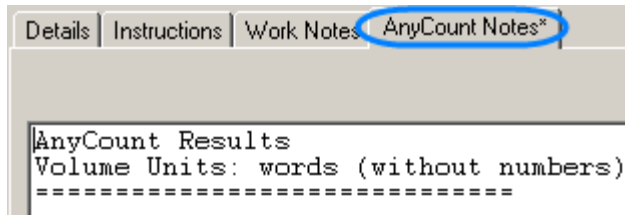
 **Note:** If the units selected were not specified as "Used by AnyCount" you will not be able to perform the count. This option is available on the Volume Units page of the Business Settings. It was implemented to distinguish volume units, that cannot be used as text volume units (e.g. "hours").

2. Click  button.
3. Specify the necessary file in the **Open** dialog box.

 **Note:** If you call **AnyCount** from the **Project Tree** page, you will need to specify the count units in the special **Select Unit** dialog first.

4. **AnyCount Engine** starts once you select the file and click **Open** button and count results are

entered to the **Volume** field of the **New Client Jobs** window; expanded count report is added on the **AnyCount Notes** tab which appears after AnyCount is used:



Settings

You can adjust count settings (e.g. counting Footers/Headers for .DOC or Meta keywords for .HTML) for each of the supported files formats on the AnyCount page of the Personal Settings window. To open it click menu **Settings > Personal**.

[Read more about AnyCount 5.0](#)

See Also: [CATCount](#)

18 CATCount

CATCount is a useful software tool for translation industry professionals. It greatly eases the task of accounting of Computer Assisted Translation jobs. **CATCount** does this by translating complex CAT Scheme into one easy number, i.e. **CATCount**. Additionally, it provides great features for printing and export of used CAT Scheme together with original word counts, and resulting **CATCount**. Word count analysis logs of Trados Translator's Workbench are processed automatically.

Translation Office 3000 V8 is equipped with latest version of **CATCount** to quicken and simplify expenses calculation for each job.

CATCount is accessible when creating new jobs and quotes: from **New/Edit Draft Client Job** and **New/Edit Client Job**.

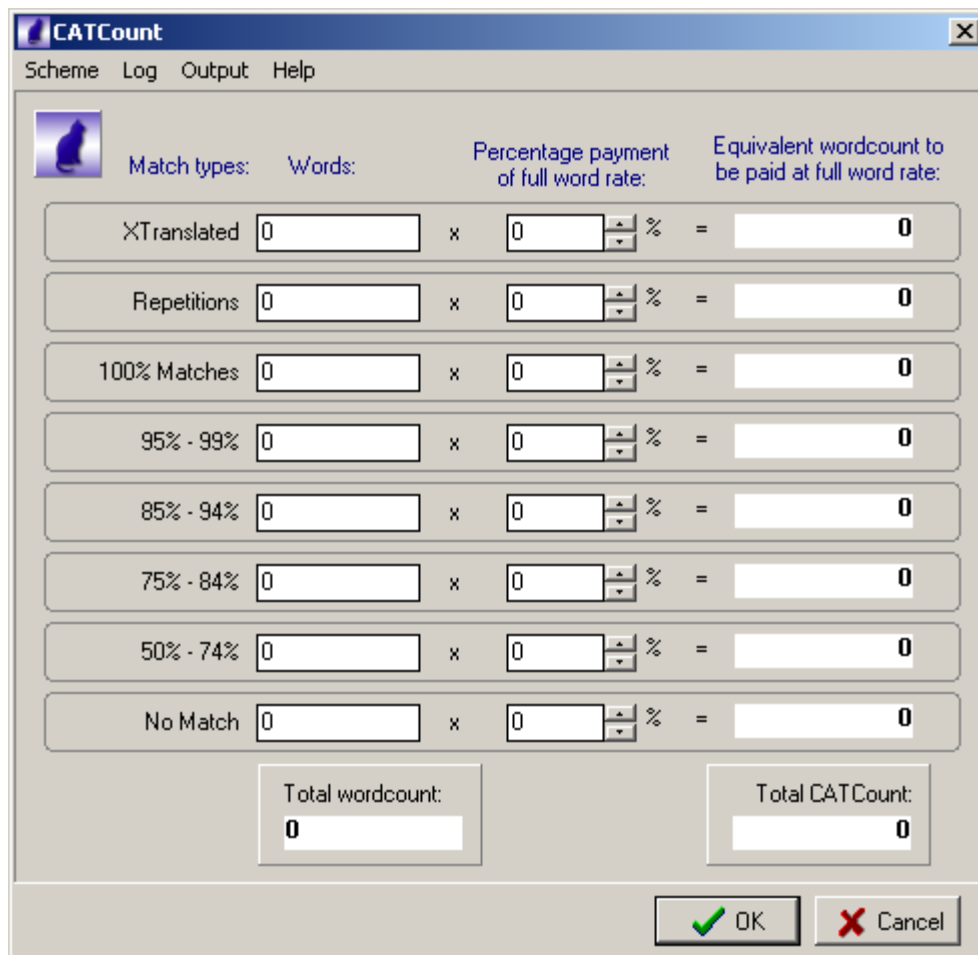
Let us take a closer look on using CATCount in Translation Office 3000 V8 on the example of using it when creating a **Client Job**.

When you open **New Client Job** window you specify the job name, group and service at first. CATCount comes at a hand when you want to specify the volume of the job and calculate its cost using the CAT Scheme. The result will be automatically entered to the **Volume** field.



Specifying job volume using CATCount:

1. Click **CATCount** button from the **New/Edit Draft Client Job** or **New/Edit Client Job** windows. CATCount application will open.



2. Enter the number of words with different level of match, the percentage of full rate payment, i.e. the CAT Scheme. Once you have entered the values you can save the scheme clicking **Scheme > Save**. You can load it next time clicking **Scheme > Load**.

You can load word count analysis logs of Trados Translator's Workbench using menu **Log > Load**.

3. Click **OK** to enter the **Total CATCount** number to the **Volume** field:

The screenshot shows a dialog box with a 'Volume:' label, a text input field containing '93', and a dropdown menu showing '(CATCount)'. To the right are two buttons: '<= AnyCount' and '<= CATCount'. The '93' and '(CATCount)' are circled in blue.

or click **Cancel** to close the **CATCount** application without changes.

Expanded count report is added on the **CATCount Notes** tab which appears after **CATCount** is used:

The screenshot shows a window with tabs: 'Details', 'Instructions', 'Work Notes', and 'CATCount Notes*'. The 'CATCount Notes*' tab is active and contains a 'Remove' button and a scrollable area titled 'CATCount Results'. The results are as follows:

Match types:	Words:	Percent:	Equivalent
XTranslated	0	0	0
Repetitions	40	50	20
100% Matches	0	0	0
95% - 99%	86	85	73
85% - 94%	0	0	0
75% - 84%	0	0	0
50% - 74%	0	0	0
No Match	0	0	0

Below the table, it states: Total words = 126
CATCount = 93

Generated by CATCount, http://www.catcount.com, 5/25/2006 at 1:39:48



Settings

You can specify the count units for the **CATCount** on the **CATCount** page of the Advanced Settings windows. To open it click menu **Settings > Advanced** and select **CATCount** in the left part of the window.

More information about [CATCount](http://www.catcount.com) tool: www.catcount.com

See Also:

Built-in AnyCount

19 Exporting TO3000 data

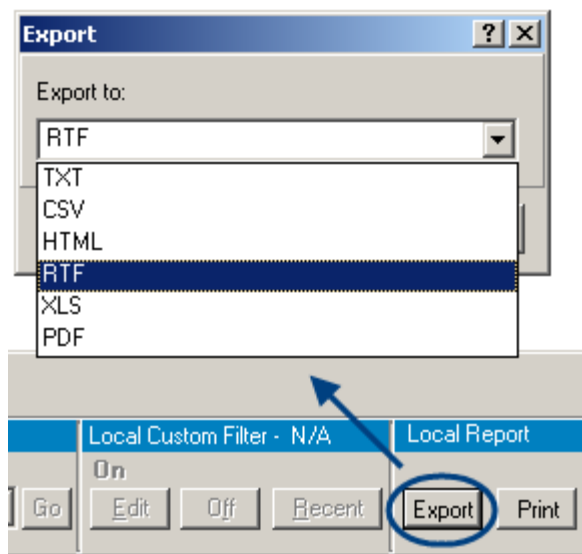
It is a usual situation that you need to use data from [Translation Office 3000 V8](#) database in other applications.

[Translation Office 3000 V8 Local Report](#) option allows you easily exporting data to .RTF, .TXT, .CSV, .XLS, .PDF, .HTML formats.

 **Note:** some kinds of data cannot be exported to certain formats, then the list of available formats becomes shorter.

To export Translation Office 3000 V8 data:

1. Click **Export** button from **Local Report** group of buttons on **Button Panel** (please see the screenshot above). **Export** window opens providing the list of available target file formats:



2. Select the necessary format from the drop-down list and click **OK**.

For details on exporting to different file formats please see:

Export to .RTF

Export to .TXT

Export to .CSV

Export to .HTML

Export to .XLS

Export to .PDF

19.1 Export to .TXT

Exporting [Translation Office 3000 V8](#) data to TXT format does not require specifying any additional settings.

After selecting TXT in the Export window the standard [Windows Save As](#) dialog box appears where you can specify the target file name.

See Also:

Export to .RTF

Export to .CSV

Export to .HTML

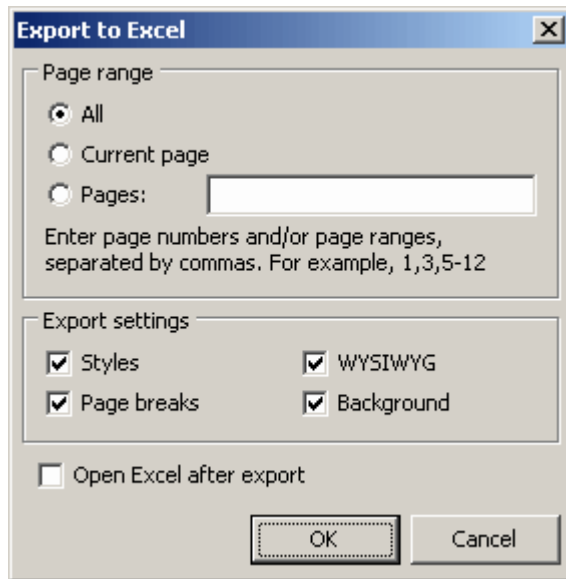
Export to .XLS

Export to .PDF

19.2 Export to .XLS

In the [Export to Excel](#) window you can set properties of output file when exported in XLS format.

It opens when you select [.XLS](#) from the [Export](#) to drop-down list on the Export window.



Settings for exporting to Excel:

Page range:

- select **All** to export all pages of the source;
- select **Current page** to export only the page you are currently viewing;
- select **Pages** and specify the numbers in the text box provided to print only certain pages.

Export settings:

- select **Styles** to save style setting of the source when exporting;
- select **Page breaks** and page breaks will be compulsively inserted in the .XLS file;
- select **WYSIWYG** (What You See Is What You Get) to make the .XLS file look exactly as the picture you see on the screen;
- select **Background** to keep the view of the background in the target .XLS file;

To automatically open the new file after finishing export procedure select **Open Excel after export**.

See Also:

Export to .RTF

Export to .TXT

Export to .CSV

Export to .HTML

Export to .PDF

19.3 Export to .CSV

Exporting [Translation Office 3000 V8 data](#) to CSV format does not require specifying any additional settings.

After selecting CSV in the Export window the standard [Windows Save As](#) dialog box appears where you can specify the target file name.



See Also:

Export to .RTF

Export to .TXT

Export to .HTML

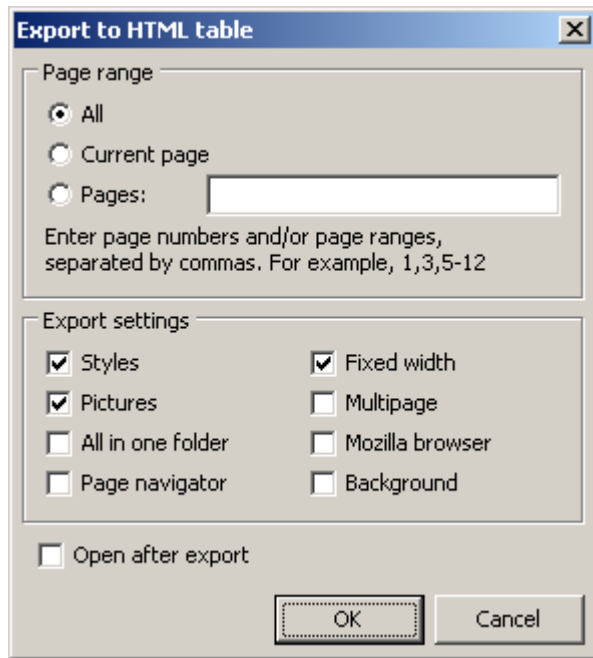
Export to .XLS

Export to .PDF

19.4 Export to .HTML

In the [Export to HTML](#) window you can set properties of output file when exported to HTML format.

It opens when you select [.HTML](#) from the [Export](#) to drop-down list on the Export window.



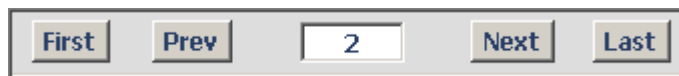
Settings for exporting to .HTML:

Page range:

- select **All** to export all pages of the source;
- select **Current page** to export only the page you are currently viewing;
- select **Pages** and specify the numbers in the text box provided to print only certain pages.

Export settings:

- select **Styles** to save style setting of the source when exporting;
- select **Pictures** to enable exporting pictures from the source file;
- select **All in one folder** to store all newly created files of the HTML page in one folder;
- select **Page navigator** to add the page navigator (see the screenshot below) to your new .HTML file



- select **Fixed width** to fix the width of the columns and rows of the exported tables (tables will not extract and contract according to the window size);
- select **Multipage** to export data to a multipage .HTML file;
- select **Mozilla browser** to export data to .HTML file specially adopted for Mozilla browser;
- select **Background** to keep the view of the background in the target .HTML file.

To automatically open the new file after finishing export procedure select **Open after export**.

See Also:

Export to .RTF

Export to .TXT

Export to .CSV

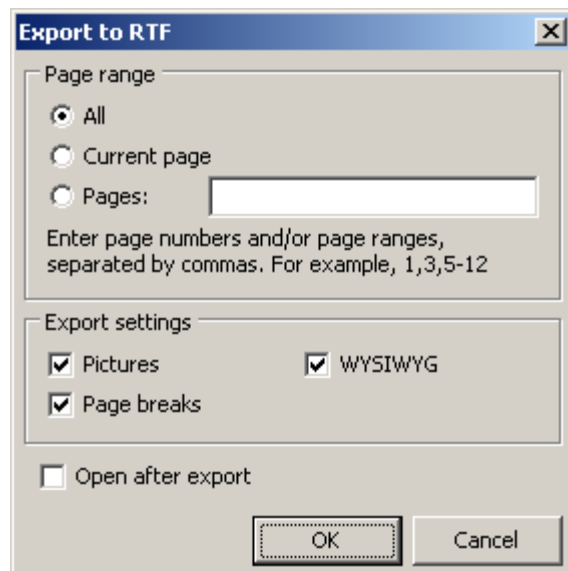
Export to .XLS

Export to .PDF

19.5 Export to .RTF

In the **Export to RTF** window you can set properties of output file when exported to RTF format.

It opens when you select **.RTF** from the **Export** to drop-down list on the Export window.



Settings for exporting to .RTF:

Page range:

- select **All** to export all pages of the source;
- select **Current page** to export only the page you are currently viewing;
- select **Pages** and specify the numbers in the text box provided to print only certain pages.

Export settings:

- select **Pictures** to enable exporting pictures from the source file;
- select **WYSIWYG** (What You See Is What You Get) to make the .RTF file look exactly as the picture you see on the screen;
- select **Page breaks** and page breaks will be compulsively inserted in the .RTF file;

To automatically open the new file after finishing export procedure select **Open after export**.

See Also:

Export to .TXT

Export to .CSV

Export to .HTML

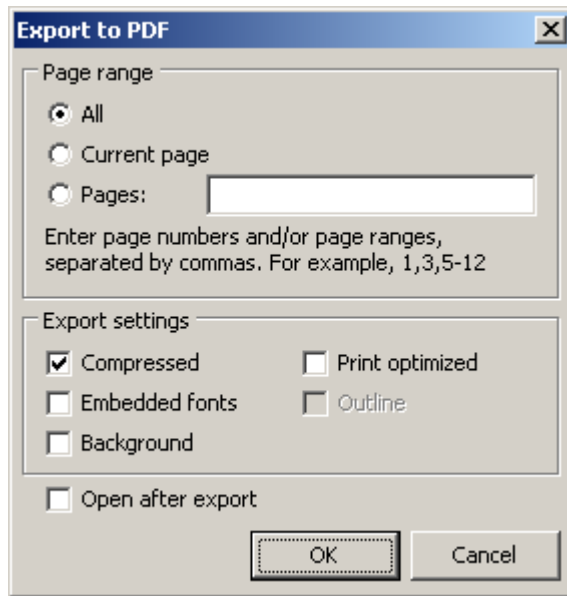
Export to .XLS

Export to .PDF

19.6 Export to .PDF

In the **Export to PDF** window you can set properties of output file when exported to PDF format.

It opens when you select **.PDF** from the **Export** to drop-down list on the Export window.



Settings for exporting to .PDF:

Page range:

- select **All** to export all pages of the source;
- select **Current page** to export only the page you are currently viewing;
- select **Pages** and specify the numbers in the text box provided to print only certain pages.

Export settings

- select **Compressed** to create a .PDF file of minimal size;
- select **Embedded fonts** to create a .PDF file with all used fonts embedded (like this you can be sure that you text will look the same on any computer, even if the fonts used are not installed there).
- select **Background** to keep the view of the background in the target .PDF file;
- select **Print optimized** to optimize the new .PDF file for printing at once.

For details on exporting to different file formats please see:

Export to .RTF

Export to .TXT

Export to .CSV

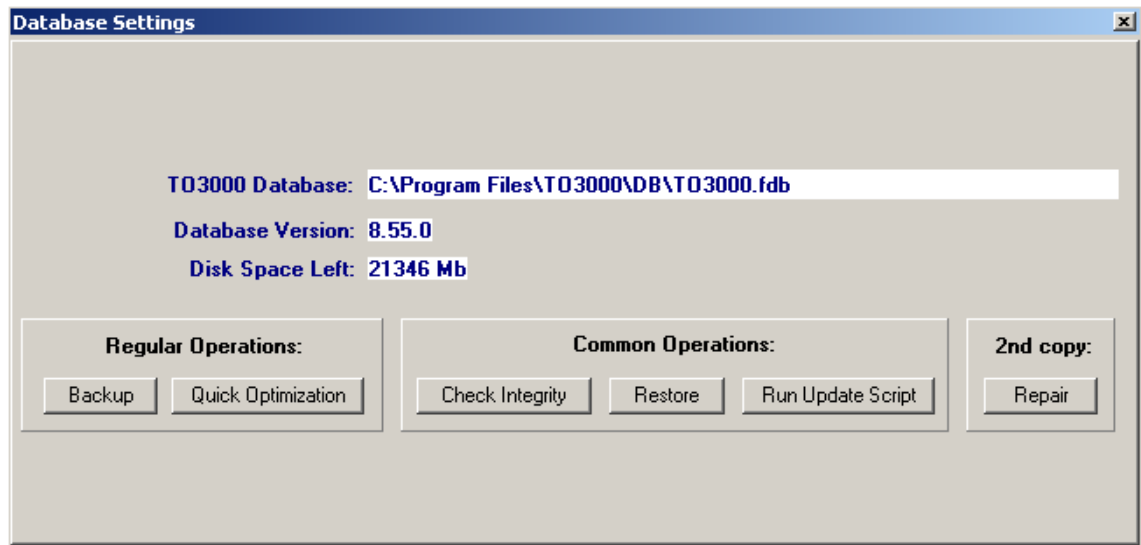
Export to .HTML

Export to .XLS

20 Database Operations


Database is the most important part of your Translation Office 3000 V8.

You can directly manage it from the **Database Settings** window:



To open the **Database Settings** window click menu **Settings > Database**:



 **Note:** Database managing requires TO3000 to run in a special mode. That is why all other parts of the interface become out of view when the **Database Settings** window is open.

For details on each operation please see:

Backup/Restore TO3000 database

Run Update Script

Quick Optimization

Repair

See Also:

Database Settings

20.1 Backup/Restore TO3000 database

Translation Office 3000 V8 is used at the core of the workflow. It is vitally important to perform regular backups of TO3000 Database.

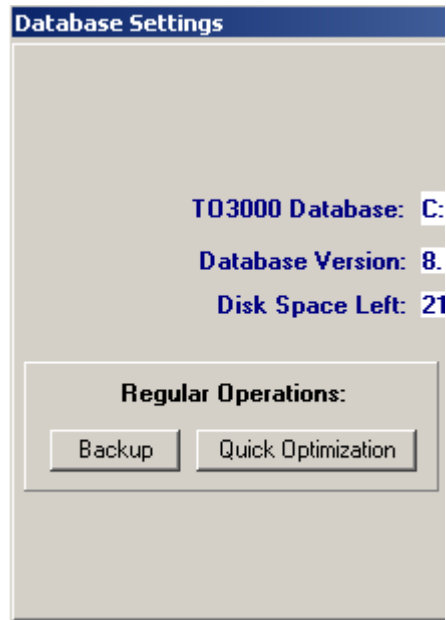
The great thing about Translation Office 3000 V8 is its ability to perform backups without need to interrupt regular work.

To backup your TO3000 database:

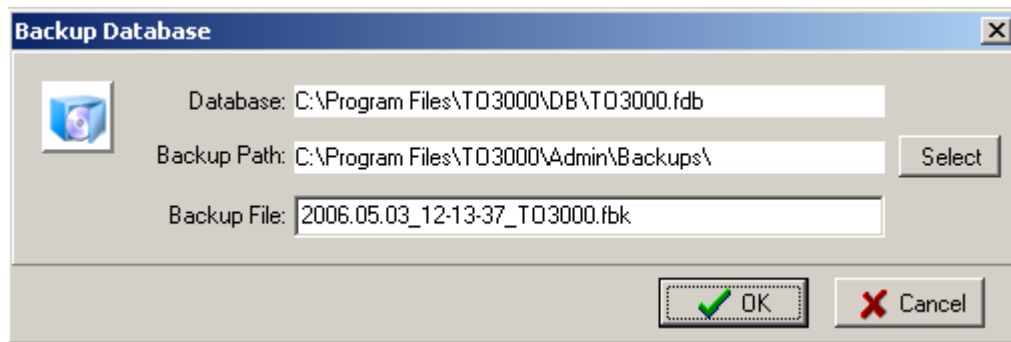
1. Click menu **Settings > Database**.



Database Settings window will open.




2. Click **Backup** button. **Backup Database** dialog box will show up:



- **Database** field shows database, which is being backed up.
- **Backup Path** displays target path, where backup file will be copied. Translation Office 3000 V8 remembers last backup path used by you. You can change it using **Select** button.
- **Backup File** field displays the name of the backup file. Default name of the backup file is: Year.Month.Day_Hours-Minutes_Seconds_TO3000.t3u. This format is adopted for easy sorting of backups within Windows file system. You can change it straight by typing in the Field.

Click **OK** to start creating the backup file or click **Cancel** to close the window.

 **Note:** It is highly recommended to backup your database at least once a week and copy the backup file to a safe place, at least different from that where your database is located. This will help you to avoid data loss in case your computer crashes.

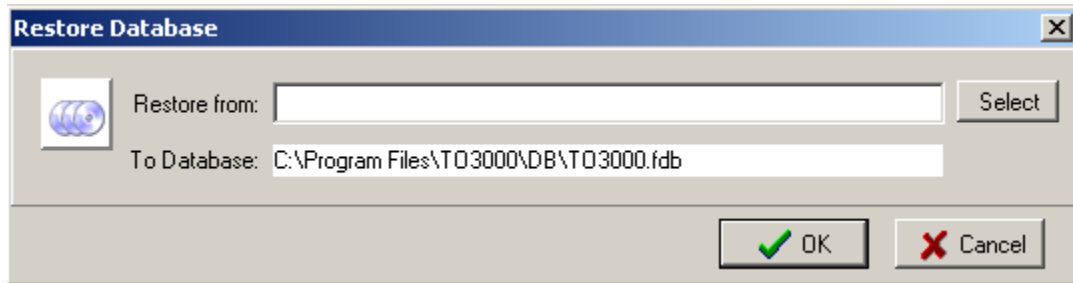
You can run **Restore** command to restore the state of database, which you have saved in file with .fbk extension created before (by running **Backup** command).

To restore TO3000 database:

1. Click menu **Settings > Database**. **Database Settings** window will open.
2. Click **Restore** button.

As a security measure, restoring requires to move away existing database from database path (by default it is C:\Program Files\Translation Office 3000 V8\db\db.fdb) before running **Restore** operation. After clicking **Restore** button the warning will appear asking to confirm that you are aware that the existing database will be deleted if you proceed. So if you have any doubts about the backup file you will restore, it is better to copy the existing database to a safe location.

3. After you confirm the proceeding of the restore procedure, the **Restore Database** window will appear.



- Click **Select** button to specify the path to the backup file.
- **To Database** field displays the future location of the restored database.
- Click **OK** to proceed or click **Cancel** to resume.

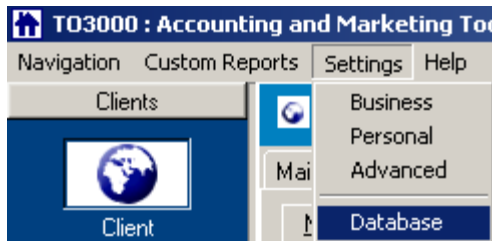
See Also: Database Settings

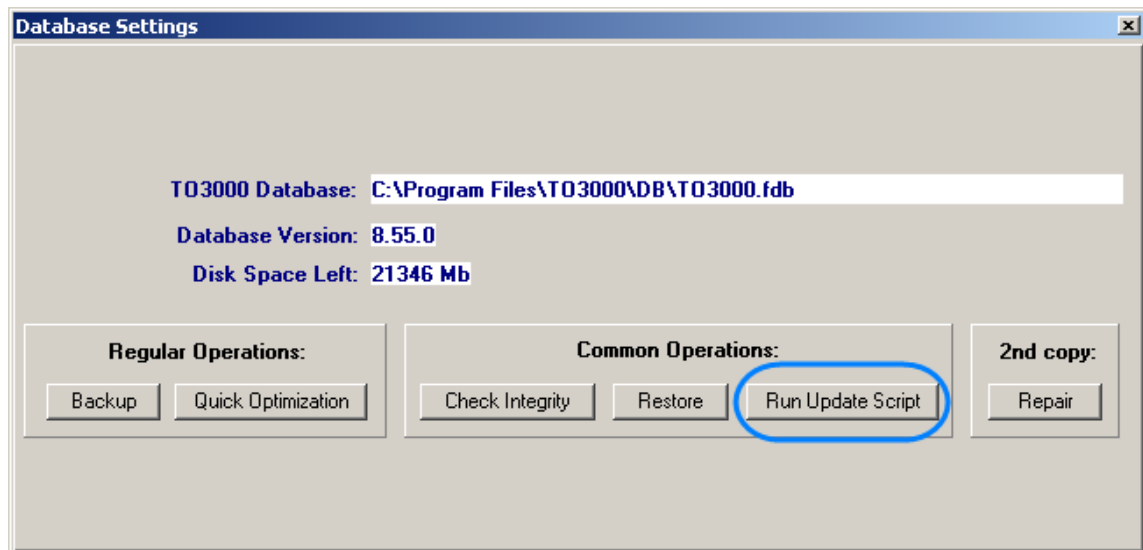
20.2 Run Update Script

In some cases, when you update your [Translation Office 3000 V8](#), database should be updated as well, to support new features or enhancements, introduced in executable files. In this case, [Translation Office 3000 V8](#) will inform you that it needs updated database. This happens only after you intentionally updated [TO3000](#), i.e. not 'out of the blue'.

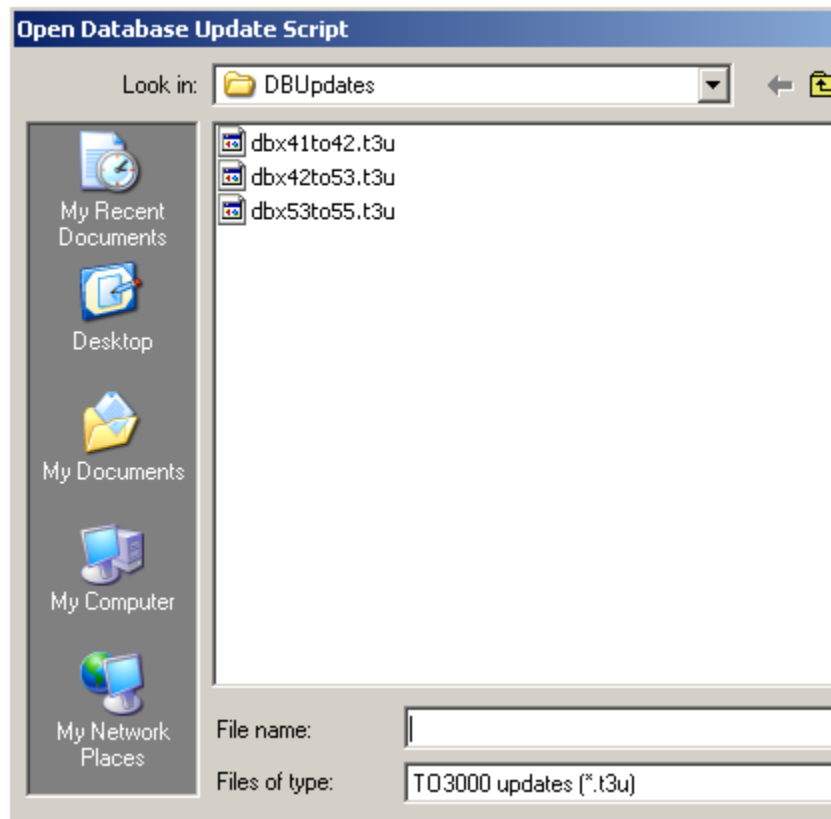
Fresh update scripts are always installed together with [Translation Office 3000 V8](#) update into `C:\Program Files\TO3000\Admin\DBUpdates` folder.

You can update database by clicking **Run Update Script** button from the **Database Settings** window (to open it click menu **Settings > Database** command):






and selecting the proper script. If you have not updated your software for a while, more than one update can be required to fill the gap between installed database version and required database version.



You can view installed database version on **Database Settings** window as well:

Database Version: 8.55.0

➔ Example: Installed database version is 8.42.0 and software update requires 8.55.0 database version. In this case you should consecutively run two updates (first dbx42to53.t3u and then dbx53to55.t3u):

 **Note:** Translation Office 3000 V8 does mandatory backup before each database update operation, for maximum security of data in case anything goes wrong during update.

See Also:

Backup/Restore TO3000 database

Database Settings

20.3 Quick Optimization

Quick Optimization command frees up unused space in database file and improves its performance. Need for optimization may vary depending on the number of records in database and number of everyday writes to database, but running **Quick Optimization** at least once a week is a good practice.

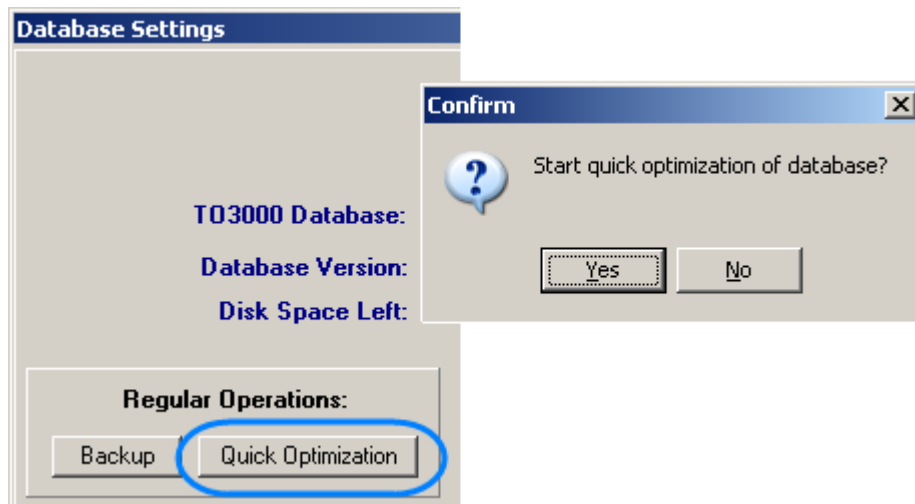
To perform Quick Optimization:


1. Click menu **Settings > Database Command**



Database Settings will open.

2. Click **Quick Optimization** button and confirm the operation.



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

See Also:


Backup/Restore TO3000 database

Run Update Script

Database Settings

20.4 Repair

TO3000 is very reliable software running on very reliable database platform. However, nothing is perfect – and in cases when you are informed about errors after running **Check Integrity** command, it is necessary to attempt repairing database by running **Repair** command from **Database Settings** window.

 **Note:** As a security measure, **Translation Office 3000 V8** cannot run any repairs on the original location of **Translation Office 3000 V8** (C:\Program Files\TO3000\db\). You should copy database in some other location (do not forget to shut down **TO3000** before copying) and attempt to repair this copy. If the reparation will be successful you can replace the working database with the repaired copy.

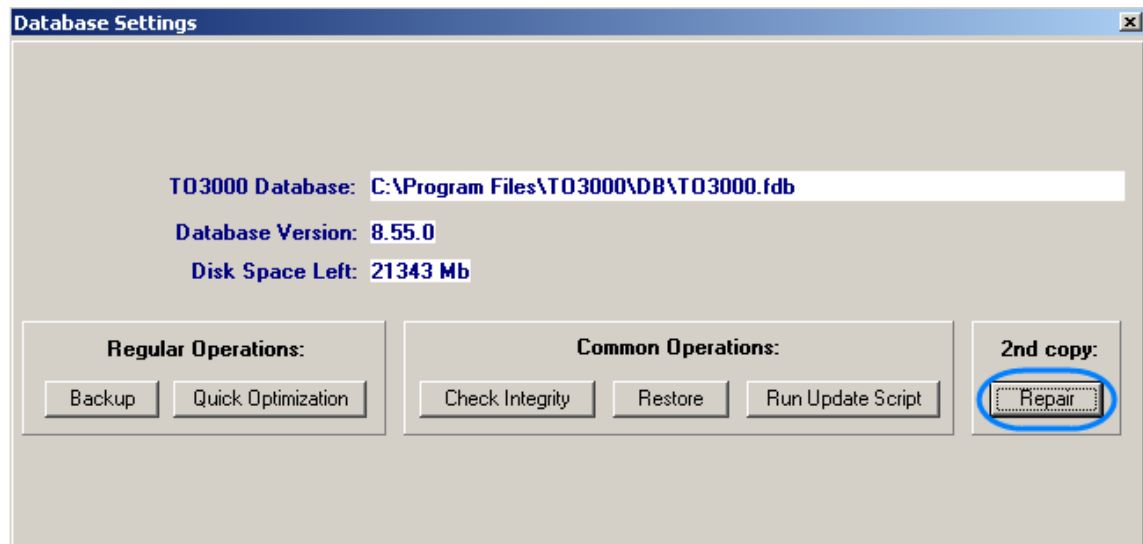
To perform **Repair** command:

1. Click menu **Settings** > **Database** command

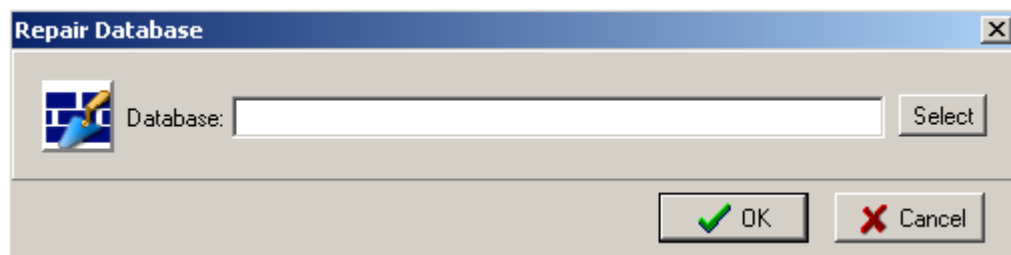


Database Settings will open.

2. Click **Repair** button:



and specify the location of the database copy you want to repair in the **Repair Database** dialog using **Select** button:



In the end of the reparation process the notice will appear, informing you if the reparation has been successful.

If the repair fails, the only alternative is restoring database from most recent backup, therefore it is important to backup often.

See Also:

Backup/Restore TO3000 database

Database Settings