



# **Projetex 9 Quick Start Guide**

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## 1 Setting currencies and services

In *Projetex* you can assign individual *client currency* to each *client*, *expert currency* to each *freelancer*, 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 *Projetex*.

### Setting base currency

*Base currency* represents your local currency, in which your company conducts accounting.

Base currency can be changed on **Corporate Settings** tab of *Projetex Server Administrator*. To do so:

Run *Projetex Server Administrator*.

- Click **Database** tab.
- Put your database offline by clicking **Go offline** button.
- Once database is offline, switch to **Corporate Settings** tab and click **General Settings**.
- Click **Base Currency** button and select the necessary currency in **Edit Base Currency** window:
- Make sure that the base currency is set correctly before starting your work in *Projetex*.

### Adding new currencies

Since the currencies of your clients and freelancers may be different from yours, you will need to add new currencies to your *Projetex* database and to *define their exchange rates* relating to your base currency.

To define currency settings:

1. Open *Projetex Workstation* and select **Corporate** command of **Settings** menu.
2. In **Corporate Settings** window, click **Currencies**.
3. If some of the currencies that you need are not included into the list, you may add them by clicking **New** button. You can also edit or delete an existing currencies.

### Setting exchange rates

You can *enter exchange rates* between your base currency and any of the other currencies. Exchange rates of currencies are used for keeping parallel records in both base currency and client/freelancer currencies relating to your base currency.

To enter an exchange rate, click **Exchange Rates** section in **Corporate Settings** window.

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* and click **OK**.

## Managing services


Services represent types of work being performed in client jobs, corporate jobs and freelance jobs. Most services are translations of certain language pairs. There is no limitation on the number of service types and names. Each service must belong to one certain group of services.

To add or edit a group of services:

1. On the **Settings** menu of *Projetex Workstation* click **Corporate Settings**.
2. In the **Corporate Settings** window click **Groups of Services**.
3. Click **New** button to add a new group of services, or click **Edit** button to open currently selected group for editing.
4. Enter or change name of service group on **New Service Group (Edit Service Group)** window.

To add or edit a service:

1. On the **Settings** menu of *Projetex Workstation* click **Corporate Settings**.
2. In the **Corporate Settings** window click **Services**.
3. Click **New** button to add a new service, or click **Edit** button to open currently selected service for editing.
4. Add or change volume unit information on the **New Service (Edit Service)** window.

 **Note:** You can use **New...** menu to create a service. To create a service, on the **New...** menu click **Service**, and follow the steps of **New Client Wizard**. This option may not be available to some of users due to their access rights limitations.

## 2 Creating a database of clients

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

There are two ways of manually creating a new client record in [Projex](#):

**A** — Using **New...** menu. To create a client record, on **New...** menu click **Client** command, and follow the steps of **New Client Wizard**. This option may not be available for some of the users due to access rights limitations.

**B** — Creating a new client on the **Main** tab of **Client** window. To create a client record, follow the steps below:

1. Click **New Client** button above the **Client** list on the **Main** tab of **Client** window.
2. Choose **New Client Wizard** or **Quick Creation** option. If you chose **New Client Wizard** option, follow all the steps of it to create a new client. If you chose **Quick Creation** option, fill the following fields:
  - Enter a name of the client in **Name** text field.
  - Enter a code for the client record in **Code** text field (12 symbols maximum) or click **AUTO** button to generate the code automatically (it will usually contain the first letters of **Name** in this case).
  - Select **Client Currency** using the corresponding drop-down list.
  - Click **OK** to confirm or **Cancel** to discard the entered information.

To import Client database from a file:

- Run [Projex9Setup.exe](#) and install [Projex 9 Import Utility](#).
- Run [Projex 9 Import Utility](#) and proceed with import process.

For more details on [Projex 9 Import Utility](#), please refer to [Projex Import Utility Guide](#).

To import Client database from your [Translation Office 3000](#):

- Run [Projex Database Converter](#).
- Convert your [Translation Office 3000](#) database.

For more details on [Projex Database Converter](#), please refer to [Upgrade to Projex 9 Guide](#).

### 3 Creating quotes and projects

**Quotes** and **Projects** can be created using **Quotes** tab of **Client** window and **Main** tab of **Project** window respectively. A project can also be created based on a certain quote.

There are two ways of creating a new quote to client in **Projetex**:

**A** — Using **New Quote Wizard**. To create a quote to client, on **New...** menu click **Quote**, and follow the steps of **New Quote Wizard**. This option may not be available to some users due to their access rights limitations.

**B** — Creating a new quote to client on the **Quotes** tab of **Client** window. To create a quote, follow the steps below:

1. Open **Main** tab of **Client** window.
2. Select a **Client**.
3. Click **Quotes** tab.
4. Click **New** button.
5. Fill in the fields in the **New Quote** window.

**Projects** can be created from two areas of **Projetex**:

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

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

**New Project** window contains the following sections:

**Name** — project name can be 150 characters long.

**Client** — client which this project is assigned to (cannot be changed after creation of the project).

**Client Account** — this button can be used to assign a project to a different account of client. Current account name and the list of responsible account managers are displayed next to **Client Account** button. See Account Management topic for details.

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

**Corporate PM** — Project Manager, responsible for this project on your side.

**Timeline** — timeline of a project in **Projetex** includes assigned, deadline dates and the date when the project has been actually completed.

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

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

## 4 Creating jobs

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

There are two types of jobs in **Projetex** — client jobs and expert jobs. Client jobs are jobs sold by you to client. Expert jobs are one-man portions of client job, each performed by certain expert (corporate or freelance)

Client jobs can be created in the following areas of **Projetex**:

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

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

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

## 5 Assigning experts

**Corporate** and **Freelance Jobs** in **Projetex** must be assigned to certain experts (**Corporate Experts** and **Freelancers** accordingly) before they can be marked as "Completed". The quickest way to assign experts is to use **Tree** tab of **Project** window.

To assign corporate expert or freelancer:

- Open **Projects** section of **Navigation** panel and click **Project** icon.
- Click **Main** tab and select a project.
- Click **Tree** tab.
- Right-click a **Corporate** or a **Freelance Job** and select **Edit** option in the context menu.
- Click **Select** button.
- In the **Expert Chooser** dialog window choose an expert for this job and click **OK** button.

To remove corporate expert or freelancer from a job:

- Open **Projects** section of **Navigation** panel and click **Project** icon.
- Click **Main** tab and select a **Project**.
- Click **Tree** tab.
- Right-click a **Corporate** or a **Freelance Job** and select **Edit** option in the context menu.
- Click **None** button to unassign currently assigned expert.



## 6 Invoices and purchase orders

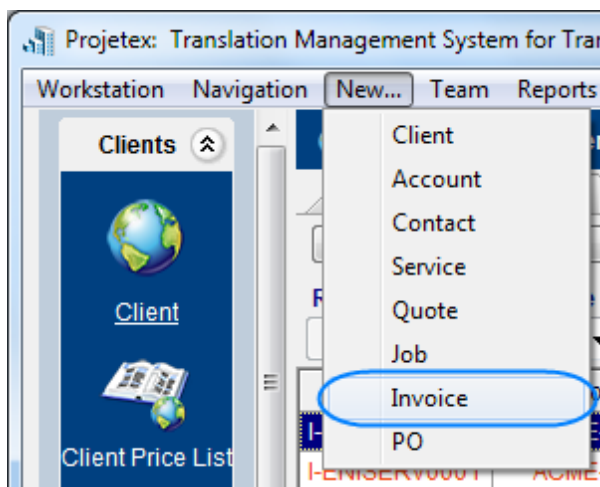
Projetex can be used to quickly issue, edit and delete *invoices* to clients, *purchase orders* to freelancers and link them with *payments* for consistent project account balance picture.

To create an invoice to client,

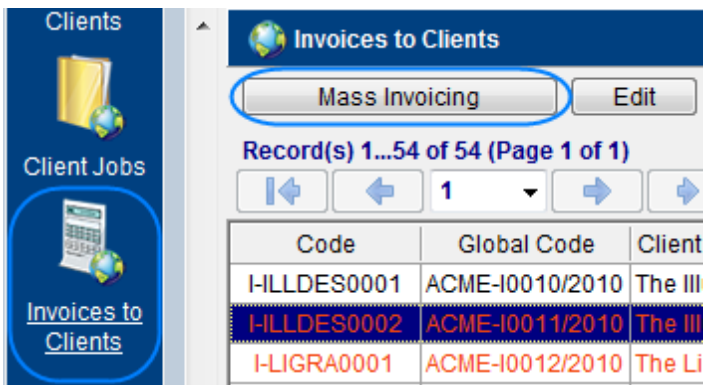
1. Open **Main** tab of **Client** window.
2. Select a client.
3. Switch to **Invoices** tab.
4. Click **New** button.



Alternatively, on **New...** menu click **Invoice** command. This will start **New Invoice Wizard**.



Invoices can also be created by clicking the **Mass Invoices** button on the **Invoices to Clients** window.

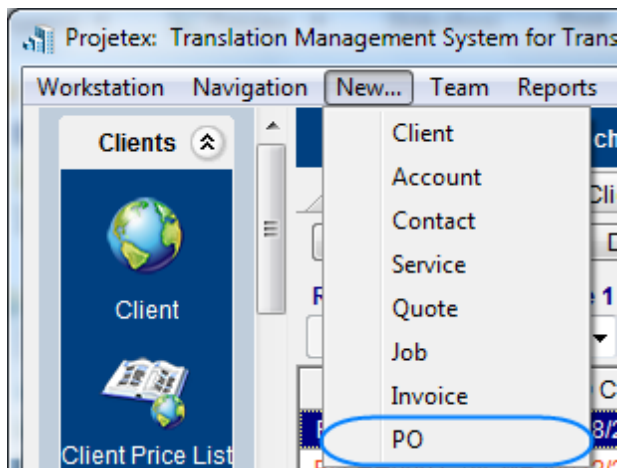


To create a purchase order:

1. Open **Main** tab of **Project** window.
2. Click required project.
3. Click **POs** tab.
4. Click **New** button.



Alternatively, on the **New...** menu click **PO** command. This will start **New Invoice Wizard**.



Purchase orders can also be created directly from **Edit Freelance Job** window. To create

purchase order this way:

1. Open any freelance job, which has a freelancer assigned, but has not yet been added to purchase order. Freelance jobs can be found on the **Freelance Jobs** tab of **Project** window.
2. In the **Edit Freelance Job** window click **Create PO** button.
3. Freelance job can be added to existing purchase order, or to a new one. Click **Add this Job to New PO** string to create a new purchase order.

