

# Welcome



Projectex 3D is a Project Management Software for Translation Agencies.

It tremendously simplifies the task of corporate and freelance workflow management, data and file sharing within a company and provides multiple benefits for each team member.

You can either browse the help topics to learn about Projectex in a consecutive way or invoke context-sensitive topics of the Help System from any location within Projectex by pressing the F1 key.

---

If you have any questions, our Projectex support team members are ready to assist you.  
Contact us at [support@projectex.com](mailto:support@projectex.com)

# Disclaimer

Although every precaution has been taken in the preparation of this document, the publisher and the author assume no responsibility for errors or omissions, or for damages resulting from the use of information contained in this document or from the use of programs and source code that may accompany it. In no event shall the publisher and the author be liable for any loss of profit or any other commercial damage caused or alleged to have been caused directly or indirectly by this document.

Projetex, AnyCount and CATCount are registered trademarks of Advanced International Translations, Ltd.

# System Requirements

Hardware and Software	Requirements/Supported
Operating System	Windows 7 Windows 8 Windows 8.1 Windows 10 Windows server 2008, Windows Server 2012
CPU	1200Mhz or higher
Memory	2 GB or more
Hard Disk Space for Setup	2,5 GB
Hard Disk Space for Operation	3 GB
Other	<p>A LAN, VPN, or Internet connection to connect to your Projetex Server remotely.</p> <p>To install Projetex 3D Server the computer must be MS SQL SERVER EXPRESS 2014 - ready.</p> <p>You may want to review the system requirements for MS SQL SERVER EXPRESS <a href="#">here</a>.</p> <p><b>IMPORTANT:</b> Projetex 3D Server should not be installed onto domain controllers. Such a configuration is strictly not recommended due to security precautions.</p>

 **Note:** It is important to have enough free disk hard drive space for the database (at least 300–400 MB at any given moment) so that it can grow naturally without any problems and errors due to insufficient hard drive space.

# Projetex Setup

1. **Download the Projetex setup file** using the following link:

<http://translationmanagementsoftware.com/Downloads/Projetex3DSetup.exe>

2. **Run the downloaded setup file** and follow the instructions given by the Setup Wizard.

During the installation procedure Projetex setup will prompt you to select components to install.

**Note:** To quickly select only Projetex Server or Projetex Workstation components, use the drop-down list and select the **Server Installation** option or the **Workstation Installation** option correspondingly.

2.1. **Projetex Workstation** — the desktop application used to access and update data on the Projetex Server. Select this check box if you need to set up access to the Projetex database from the current PC.

2.2. **Projetex Server** — a set of program components designed to host your centralized database. Select this check box if you need to host your centralized database on the current PC.

Setup can install one of the two available databases, or not install a database at all.

- **Demo database.** Select this option if you are installing Projetex for evaluation. This database contains some sample records, imitating the workflow data of a translation agency.
- **Empty database.** Select this option to install a clean database before you begin entering your actual workflow data into Projetex.
- **Do not install database.** Select this option if you are just updating your System Administrator software, and you already have your database up and running and there is no need to install another one.

**Note:** As a security measure, Projetex Server Setup will not overwrite an existing database under any circumstances. If you would like to install a new database, please remove or delete the existing database manually before running Projetex Setup.

## Microsoft SQL Server 2014 Express

Projetex Server requires an installation of Microsoft SQL server in order to operate. In case you already have MS SQL installed, setup will reinstall it to make sure that your database engine is compatible with Projetex. It is recommended to leave this check box selected.

## Projetex Database Upgrade Utility.

The Projetex Database Upgrade Utility is an application which allows to upgrade a database from Projetex 10 to operate with Projetex 3D.

**Note:** It is also possible to import the database from earlier versions of Projetex and Translation Office 3000.

## Projetex Mail Automation Service.

Projetex Mail Automation Service is an application which can send e-mails on noteworthy events in Projetex to your managers, freelancers and clients. For more information please refer to the corresponding manual.

## Projetex Auto Backup Service.

This utility allows you to schedule automatic database backups and to choose the backup location.

**Note:** Only the database is backed up with this utility and with the manual backup function of the Projetex 3D Server Administrator application. If you might want to backup other content related to Projetex such as document templates, CAT schemes and project and client files manually.

3. **Register your Projetex Server and Workstation** (registration can be done at any time later).

Your Projetex license will not limit the number of workstations installed. Only the number of Projetex Workstations, which can connect to Projetex Server simultaneously, is limited by the number of users (workstations) in your license.

**Note:** Before registering your Projetex Workstations you need to register your Projetex Server.

---

See also:

[Upgrade to Projetex 3D](#)

# Registration/Upgrade

## Trial period

You are welcome to use Projetex free of charge during the **30-day** evaluation period.

During the evaluation period Projetex is fully functional, with the following limitations:

- Number of **clients** can not exceed **40**;
- Number of **projects** can not exceed **50**;
- Number of **freelancers** can not exceed **20**;
- Number of **corporate experts** can not exceed **30**.
- Trial limitations also apply to the embedded AnyCount engine.

## Purchase information

After purchasing the Projetex Server and Workstation applications, you will receive an e-mail message containing your serial numbers for Projetex Server and Projetex Workstations.

Before registering your Projetex Workstations you need to register your Projetex Server.

 **Note:** If you are a user of earlier Projetex versions, be sure to order the special Projetex 3D Upgrade License. The cost of such a license is much lower than that of a new Projetex 3D License

 **Note:** Registration implies entering the serial numbers to the activation windows of Projetex applications (thus switching off the evaluation mode and removing evaluation period limitations).

 **Note:** As your business grows you may need to register more Projetex Workstations. To do so, order a License Upgrade and re-register your Projetex Server Administrator with the new serial number.

You can order the License Upgrade from the following web page: <http://www.projetex.com/order>

Projetex Licenses differ by type and by the number of Workstations implied.

The **Maximum number of Workstations** determines how many Workstations can connect to the Projetex Server at any given moment. The number of Workstations in your Projetex license does not limit the number of Workstations that can be installed.

The **Maximum number of Active users** determines how many Users can have active accounts in Projetex at any given moment. The maximum number of users is equal to three times the maximum number of Workstations

Projetex Licenses can be of one of the following types:

License type	Description
<b>Upgrade to Projetex 3D License</b>	The license to upgrade from an earlier version of Projetex to Projetex 3D must be purchased by any users of earlier versions, who wish to transfer to Projetex 3D. The price of the license to upgrade to Projetex 3D is much lower than the price of a new Projetex 3D License. Be sure to order this license for the same <i>total number of Workstations</i> as in your original Projetex license.
<b>Base Projetex License</b>	The Projetex 3D Base License determines the number of workstations which can concurrently connect to Projetex Server.
<b>License Upgrade</b>	When project management needs within your organization grow, you can purchase a License Upgrade to enable concurrent access for a greater number of additional workstations within your company to the Projetex database.

After your order is processed you will receive new Projetex Server and Projetex Workstation serial numbers.

## Registering/Upgrading the Projetex Server Administrator

To register/upgrade the Server Administrator, you will need to switch the database to Offline mode first.

1. Switch to the **Database** tab of the Administrator and click the **Go Offline** button.
2. Register the Projetex Server Administrator by clicking the **Register/Upgrade** button on the **Database Server** tab of the Projetex Server Administrator or by clicking the **Help > Register** menu.
3. Paste your Projetex Server serial number, as received by e-mail, into the *Activation* window of the Projetex Server Administrator and click **Unlock**.

# Registering Workstation software

1. Run the Projetex Workstation.
2. Click the **Help > Register** (or **Upgrade**) command from the **Help** menu of each installed Projetex Workstation.
3. Paste your Projetex Workstation serial number, as received by e-mail, into the *Activation* window of the Projetex Workstation and click **Unlock**.

 **Note:** All Projetex Workstations from a single license use the same serial number.

---

See also:

[Upgrade to Projetex 3D](#)

# Upgrade to Projetex 3D

To upgrade from Translation Office 3000 or from a previous version of Projetex to Projetex 3D, delete AnyLexic 2.0 Server and all the previous versions of Projetex, instal the new Projetex 3D, and convert your database from a previous version of TO3000 or Projetex.

## Uninstalling the previous version of Projetex

Copy the existing Projetex or TO3000 database to some folder on your computer. The default locations of the database are listed below:

Projetex 8: ...\\Program Files\\AIT\\Projetex 8\\Projetex Server\\Database\\Projetex.fdb  
Projetex 7.0: ...\\Program Files\\AIT\\Projetex 7.0\\Projetex Server\\Database\\Projetex.fdb  
Projetex 2006: ...\\Projetex 2006 Server\\Database\\Projetex.fdb  
Projetex 9: ...\\Program Files\\AIT\\Projetex 9\\Projetex Server\\Database\\Projetex.fdb  
Projetex 10: ...\\Program Files\\AIT\\Projetex 10\\Projetex Server\\Database\\Projetex.fdb  
Translation Office 3000 V11: C:\\Users\\Public\\Documents\\AIT\\TO3000, Version 11\\db\\TO3000.fdb  
Translation Office 3000 V10: C:\\UsOrs\\Public\\Documents\\AbT\\TO3000, Version 10\\db\\TO3000.fdb  
Translation Office 3000 V9: ...\\Program Files\\AIT\\Translation Office 3000 Version 9.0\\db\\TO3000.fdb  
Translation Office 3000 V8: ...\\Program Files\\Translation Office 3000 V8\\db\\TO3000.fdb

Uninstall AnyLexic 2.0 Server or Projetex. For this run the unins000.exe file, which is located in the root of the program's folder. Opt to uninstall Microsoft SQL Server when you will receive the corresponding message during the uninstallation process.

If the Firebird Server is not uninstalled along with AnyLexic 2.0 Server or Projetex, uninstall it manually. To do this, go to Start > Control Panel > Programs > Uninstall a program, in the window that opens find Firebird, right-click on the program name, select **Uninstall** command and proceed through the uninstallation process.

## Installing and registering Projetex

Install Projetex 3D Server and select **Do not to install database** option during the process:

- Run Projetex 3D setup file *Projetex3DSetup.exe*
- Follow the instructions in the Projetex Setup Wizard.
- Select the **Do not install database** option during the installation process.

 **Note:** To use previously created RTF Templates, CAT schemes, Local Custom Filter settings and work files, move them from the folders listed below into the corresponding Projetex 3D target folder:

### *RTF Templates:*

TO3000: ...\\Translation Office 3000 Version 9.0\\Templates\  
Projetex 2006: ...\\Program Files\\Projetex 2006 Workstation\\Templates\  
Projetex 7.0: ...\\Program Files\\AIT\\Projetex 7.0\\Projetex Workstation\\Templates\  
Projetex 8: ...\\BusinessServer\\Templates\  
Projetex 9: ...\\BusinessSesver\\Templates\  
Projetex 10: ...\\BusinessServer\\Templates\  
**Projetex 3D (target folder):** ...\\BusinessServer\\Templates\

### *CAT schemes:*

TO3000: ...\\Translation Office 3000 Version 9.0\\System\\Schemes\  
Projetex 2006: ...\\Projetex 2006 Workstation\\System\\Schemes\  
Projetex 7.0: ...\\Projetex 7.0\\Projetex Workstation\\System\\Schemes\  
Projetex 8: C:\\Documtns and Settings\\All Users\\Application Data\\AIT\\Projetex 8\\Projetex Workstation\\System\\Schemes\

Projetex 9: C:\Documents and Settings\All Users\Application Data\AIT\Projetex 9\Projetex Workstation\System\Schemes\  
Projetex 10: C:\Documents and Settings\All Users\Application Data\AIT\Projetex 10\Projetex Workstation\System\Schemes\  
**Projetex 3D (target folder):** C:\Users\Public\Documents\AIT\Projetex 3D\Projetex Workstation\CATCount 4

*Local Custom Filter settings:*

TO3000: ...Translation Office 3000 Version 9.0\Filters\  
Projetex 2006: ...Projetex 2006 Workstation\Filters\  
Projetex 7.0: ...Projetex 7.0\Projetex Workstation\Filters\  
Projetex 8: C:\Documents and Settings\All Users\Application Data\AIT\Projetex 8\Filters\  
Projetex 9: C:\Documents and Settings\All Users\Application Data\AIT\Projetex 9\Filters\  
Projetex 10: C:\Documents and Settings\All Users\Application Data\AIT\Projetex 10\Filters\  
**Projetex 3D (target folder):** None. You can create a new folder to act as default storage for file settings.

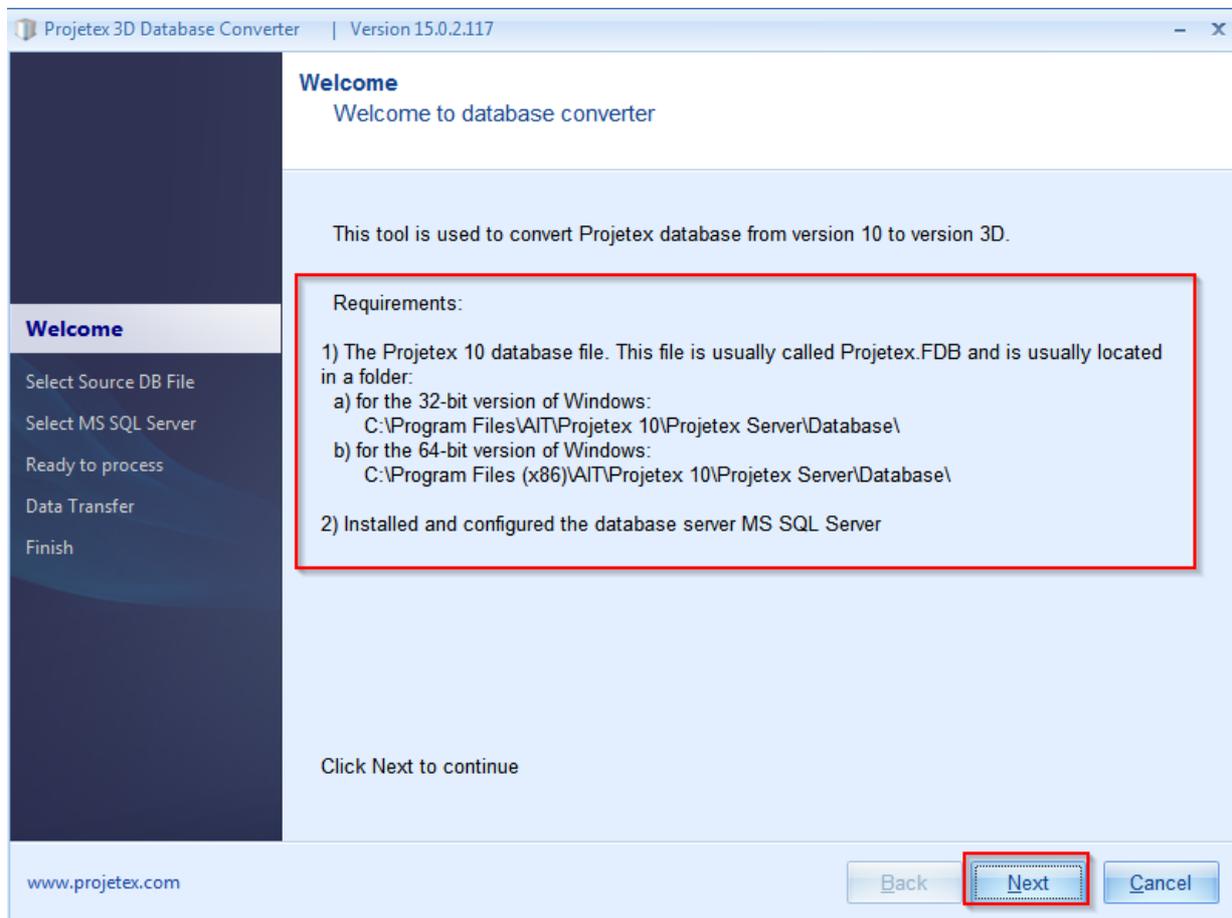
*Business folder:*

TO3000: ...Business\  
Projetex 2006: ...Business\  
Projetex 7.0: ...Business\  
Projetex 8: ...BusinessServer\  
Projetex 9: ...BusinessServer\  
Projetex 10: ...BusinessServer\  
**Projetex 3D (target folder):** ...BusinessServer\

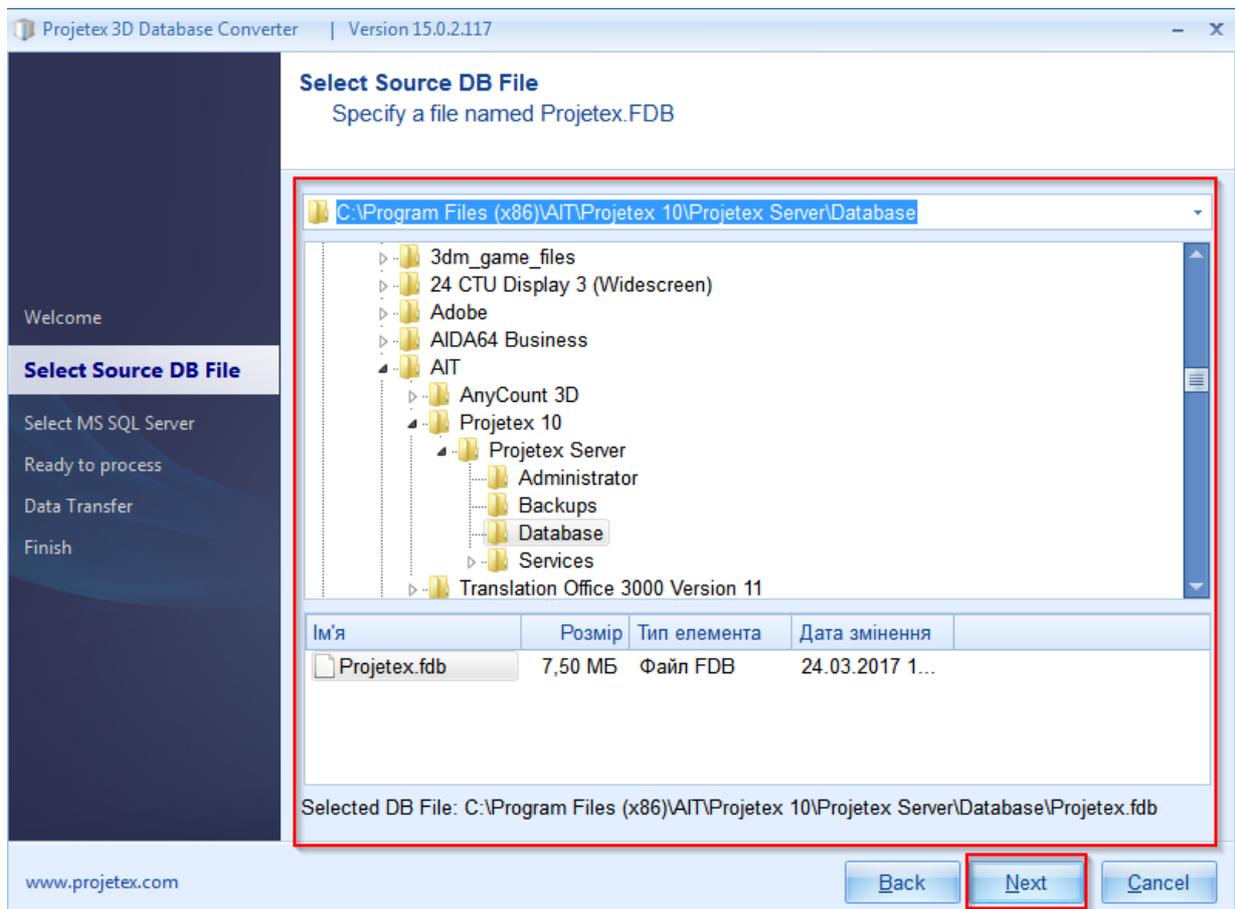
## Running the Projetex 3D Database Converter

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

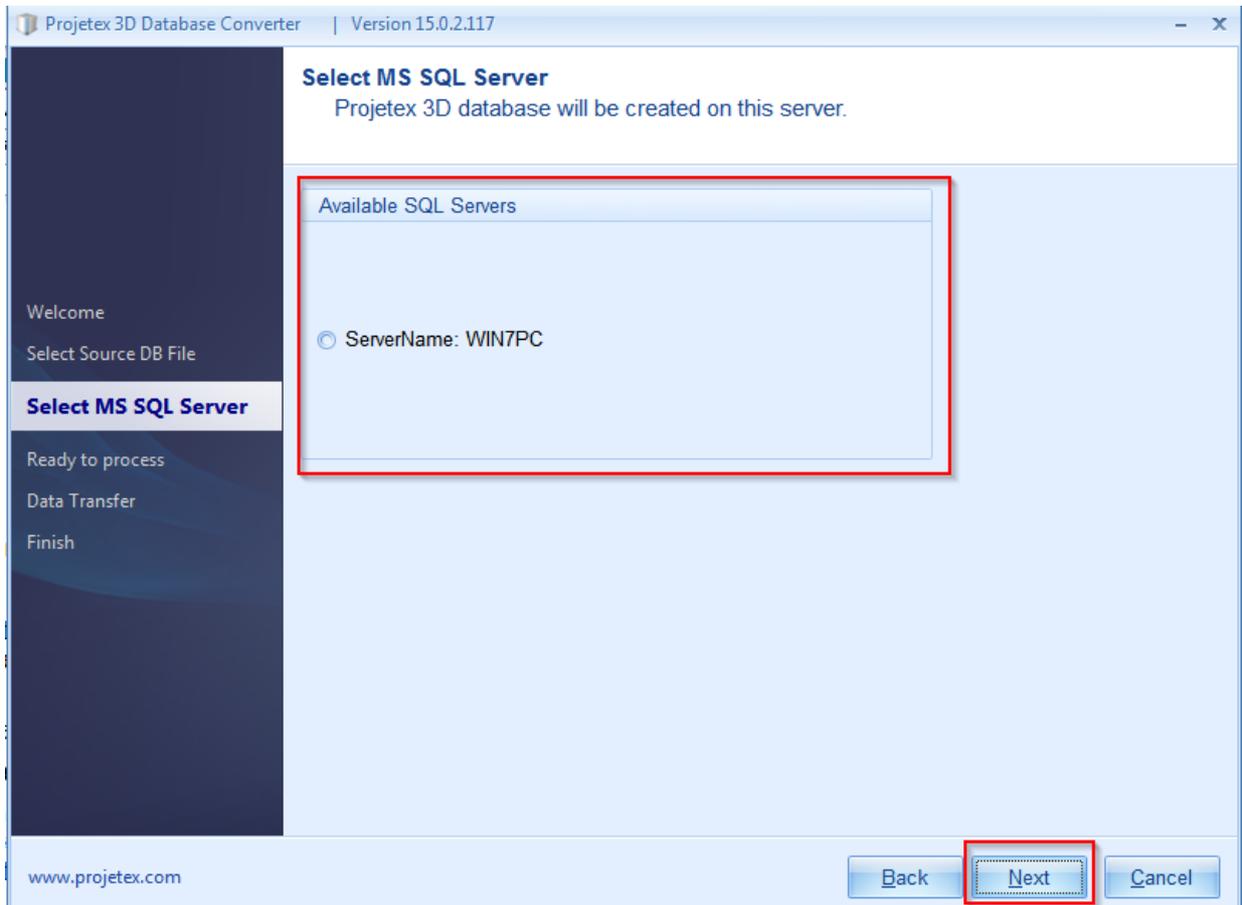
1. Run the converter from either the startup menu or by double-clicking the `Projetex3DConverter.exe` file (the default location is `\Program Files\AIT\Projetex 3D\Projetex Server\DBConverter\`).
2. The Projetex 3D Database Converter will start with a list of requirements for its successful operation. Make sure that the database of your previous installation of Projetex 10 is present on the computer and that the MS SQL server is set up and configured. Then click the **Next** button.



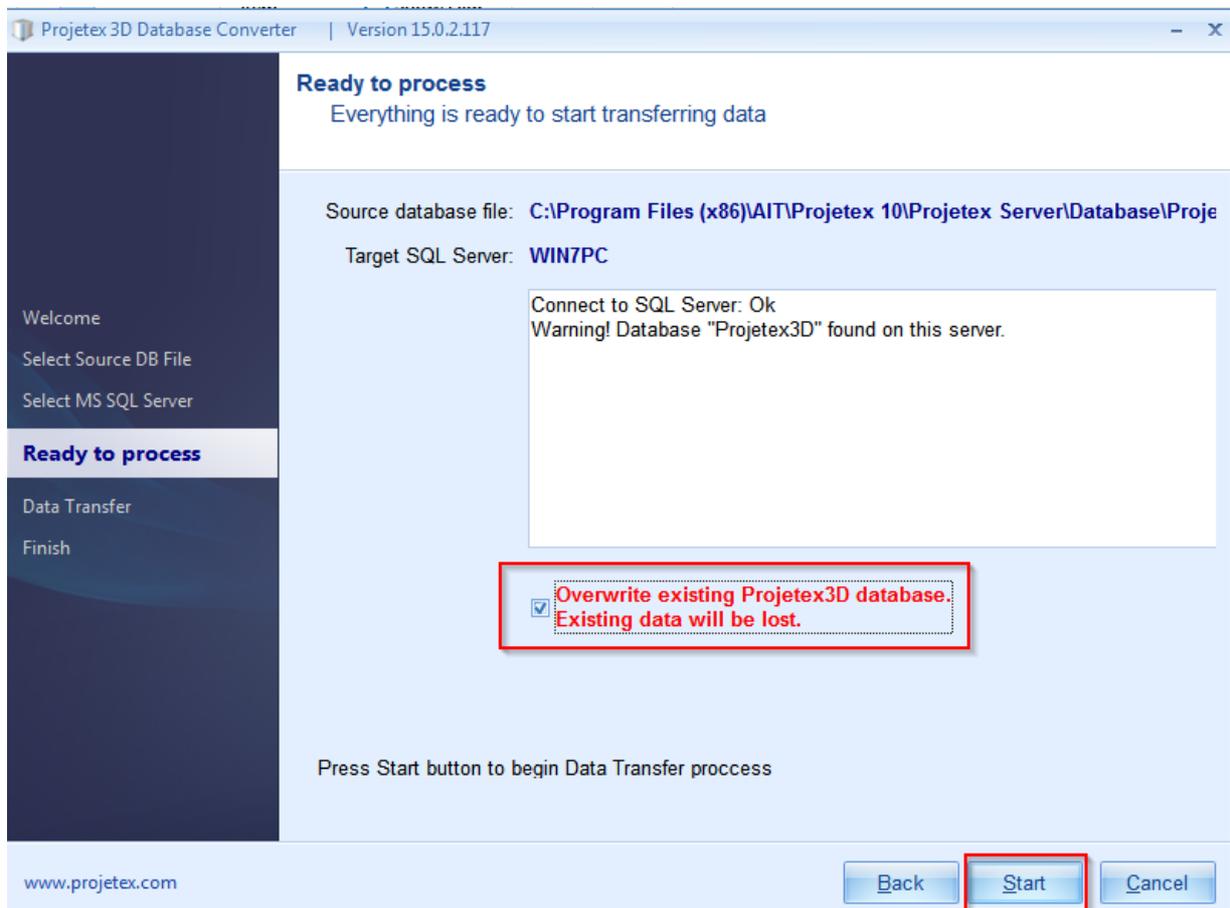
3. Navigate to the directory where your Projetex 10 database is installed. The database file should appear in the lower field. Select it and click **Next**.



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



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

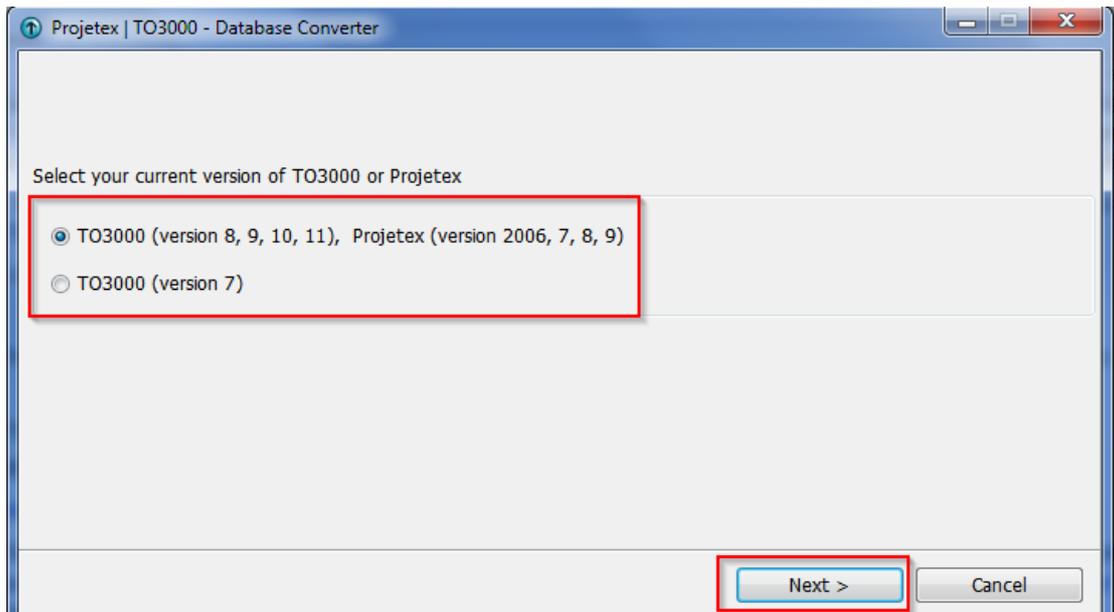


6. The Data transfer will proceed automatically. Then it is finished, click **Finish** to close the converter.

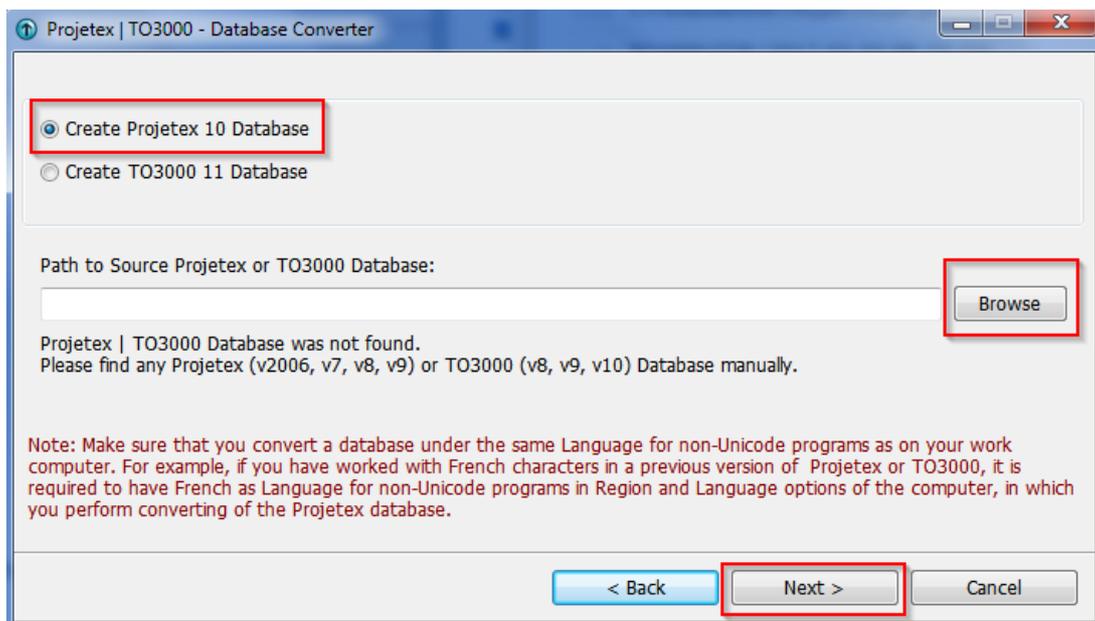
## Running Projetex 10 Database Converter

If you are using versions of Projetex older than 10, or if you want to convert your Translation Office 3000 databases, the Projetex 10 Database Converter is supplied in the standard Projetex 3D setup as well. It allows to convert a database from Translation Office 3000 (Versions 7, 8, 9, 10 and 11) and Projetex (Versions 2006, 7.0, 8 and 9) into a Projetex 10 database. You will then be able to use the Projetex 3D Database Converter to convert the new Projetex 10 database for use in Projetex 3D.

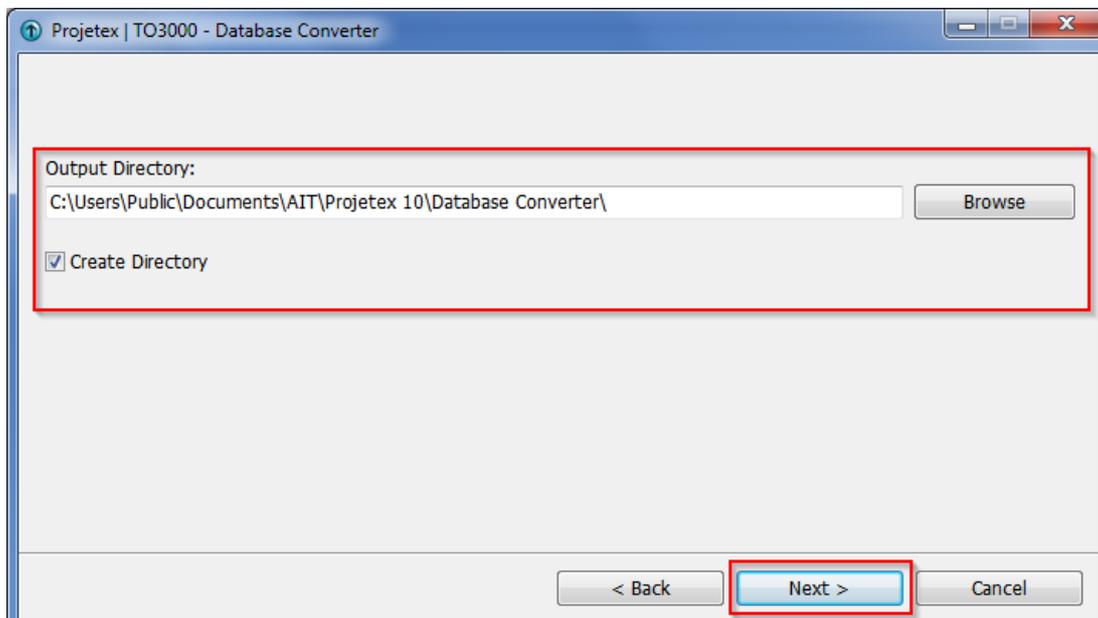
1. Run the converter from either startup menu or by double-clicking ProjetexDBConverter.exe file (the default location is \Program Files\AIT\Projetex 3D\Projetex Server\DBConverter10\).
2. Select which kind of database you would like to convert and click **Next**.



3. Select "Created Projetex 10 database", click the **Browse** button, manually specify a path to the source database file (which has been previously copied) and click the **Next** button.



3. Specify a directory into which the database file should be outputted and click the **Next** button.



4. Click the **Start** button to convert the database for Projetex 10.

5. Start up the Projetex 3D Database Converter to convert the newly created database for use with Projetex 3D.

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

## View the System Locale settings for Windows

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

---

See also:

Projetex Setup

# User Login to a Projetex Workstation

To begin working with Projetex, run the Projetex Workstation, enter the login and password and click OK.

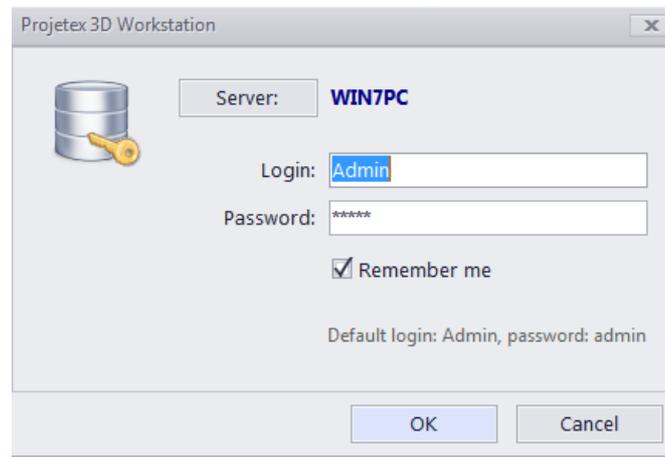
## Important:

Default login: *Admin*

Default password: *admin*

**Note:** "admin" is the default administrator's account, with maximum access rights and privileges. Administrator users are advised to change the password of this account, and delete any demo user accounts before entering any sensitive information into Projetex. User settings can be changed in the Backstage view of the Administrators' Projetex Workstation.

To edit or change the Projetex Server connection settings, click the **Server** button in the **Login** window. The currently selected Projetex Server is shown to the right of the **Server** button.



---

See also:

[LAN Connection to Projetex Server](#)

[Internet connection to the Projetex Server](#)

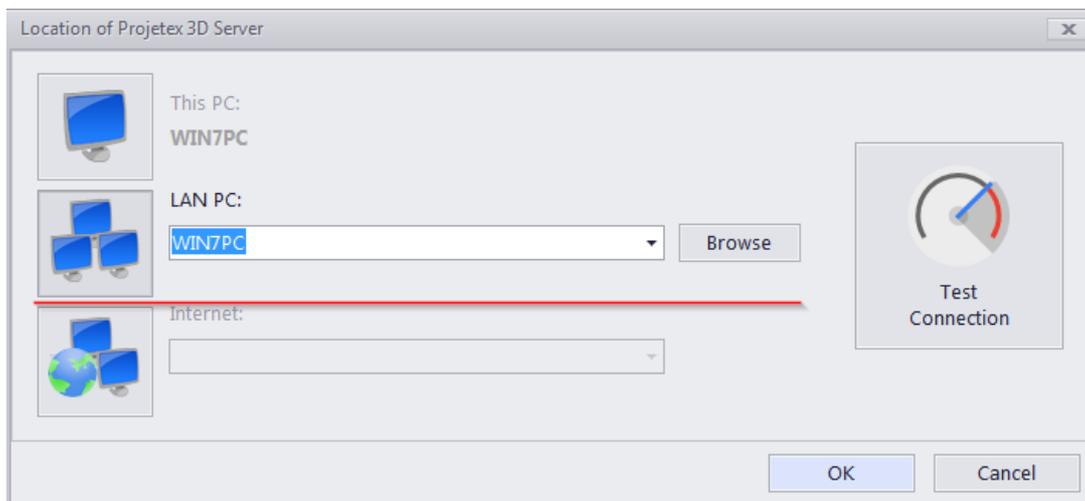
# LAN Connection to the Projetex Server

In order to connect to the Projetex Workstation through a Local Area Network (LAN) connection, the following conditions must be met:

- Both the Projetex Server and Projetex Workstations must be installed on computers within the same LAN.
- The firewall on the Projetex server computer must allow incoming connections from Projetex Workstations. TCP ports 211 and 47110 must be added to the list of firewall exclusions on the Projetex Server computer.

To connect to the Projetex Server through LAN, please do the following:

1. Before installing Projetex Workstations, install the Projetex Server on a computer in your Local Area Network. The Projetex Server can be installed on any computer in the network, no additional configuration is needed.
2. Run the Projetex Server Administrator, click the **Database Server** tab and make sure that the database server is **ON**. Switch to the **Database** tab and make sure that the Projetex database status is **Online for Workstations**. Close the Projetex Server Administrator (there is no need to keep it open, the server will be running even after you close the **Projetex Server Administrator** window).
3. Install and run Projetex Workstation on a computer in the same Local Area Network.
4. In the **Login** window click the **Server** button. In the **Network Location of Projetex Server** window click the **LAN PC** button.
5. Enter the network name of the computer, on which the Projetex Server had been installed, then click the **Test Connection** button.



6. If the connection is successful, click the **OK** button, and attempt to log into Projetex (the default login is *Admin* and the default password is *admin*).

---

See also:

User Login to Projetex Workstation

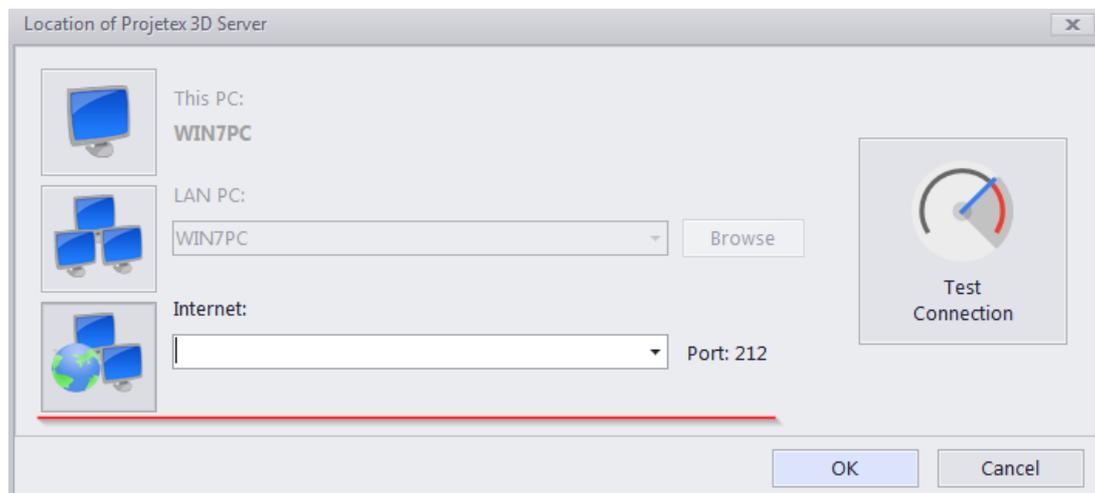
# Internet connection to the Projetex Server

In order to connect to the Projetex Server through via Internet connection, the following conditions must be met:

- The computer, on which the Projetex Server is installed must have a *static external IP* address.
- Both the Projetex Server and the Projetex Workstation computers must have a stable Internet connection.
- The firewall on the Projetex Server computer must allow incoming connections from Projetex Workstations. TCP ports 211 and 47110 must be added to the list of firewall exclusions on the Projetex Server computer

To connect to the Projetex Server through the Internet do the following:

1. Install the Projetex Server on a computer with a static external IP address and stable a Internet connection. The Projetex Server can be installed on any computer, no additional configuration is needed.
2. Run the Projetex Server Administrator, click the **Database Server** tab and make sure that the database server status is **ON**. Click the **Database** tab and make sure that the Projetex database status is **Online for Workstations**. Close the Projetex Server Administrator, (there is no need to keep it open, the server will be running even after you close the **Projetex Server Administrator** window).
3. Install and run a Projetex Workstation on a computer with a stable Internet connection.
4. Click the **Server** button in the **Login** window, then click the **Internet** button. Enter a static external IP address of the remote Projetex Server computer, then click the **Test Connection** button.



5. If the connection is successful, click the **OK** button, and attempt to log into Projetex ( the default login is *Admin* and the default password is *admin*).

See also:

User Login to Projetex Workstation

# Project manager basic working procedures

Most of the functions necessary for project manager users are included in the **Projects** section of Projetex. Since the primary purpose of Projetex is *project management*— most of the program's aspects are geared towards project managers. The procedures below point out only some of the program functions.

In general, *Project Management* in Projetex consists of the following primary steps:

*Step 1* – Creating a project. This includes entering project data into the Projetex database, setting deadlines, and managing project files.

- Creating a project
- Project profile
- Project Files

*Step 2* – Splitting the Project into a number of *billable client jobs*, each of which can have a certain volume and price.

- Creating client jobs
- Prices to clients

*Step 3* – Assigning different portions of client jobs to translators (or "*Experts*"). This involves *splitting client jobs* into smaller one-man assignments: creating *corporate jobs* and *freelance jobs*, each of which can be assigned to an in-house translator (or "*corporate expert*") or to a *freelancer*.

- Creating corporate jobs
- Creating freelance jobs
- Selecting experts

*Step 4* – Submitting jobs to corporate experts. This step involves issuing printable *job assignments* as well as providing necessary *project files* to corporate experts.

- Creating job assignments
- Corporate expert files

*Step 5* – Subcontracting some portions of project work. This involves issuing printable *purchase orders* (or POs) to freelance experts. Each *purchase order* has a number of freelance jobs, with their volumes and prices.

- Creating Purchase Orders

*Step 6* – Tracking project and job progress with the help of *Calendars* and *reports*.

- Using calendars

*Step 7* – Closing *completed jobs* and *projects*, issuing and approving *printable invoices* to the client, based on agreed payment terms.

- Invoices to clients
- Balances of projects

---

See also:

Accountant basic working procedures

Corporate expert basic working procedures

# Accountant basic working procedures

Accounting information in Projotex can generally be found in the following areas of the Workspace: **Clients** and **Freelancers**.

## Clients section

The **Client** window can be used to enter and edit client profiles. These include *billing contact information* (like VAT codes), the *postal address*, *payment terms*, and the *invoicing policy*.

The following *tabs* may also be of interest to accounting staff:

- **Contacts list**
- **Prices for clients**
- **Client Jobs**
- **Invoices to client** (this is where invoices to client can be created)
- **Payments from client** (this is where payments from client can be registered)
- **Payments to client**
- **Client Accounts**

Additional windows in the **Clients** section also provide accounting information:



Quotes

The **Clients: Quotes** window is basically identical to the **Quotes** tab of the **Client** window; though unlike the latter, it contains quotes for all clients.



Prices

With the help of the **Clients: Prices** window you can manage a list of prices for different client jobs.



Client Jobs

The **Client Jobs** window contains information on client jobs of all clients. The layout of this window is similar to the **Clients Jobs** tab of the **Client** window.



Invoices

The **Clients: Invoices** window is identical to the **Invoices** tab of tab **Client** window; though unlike the latter, the **Invoices to Clients** window contains invoices for all clients. This window also contains the **Mass Invoicing** button.



Credit notes

The **Clients: Credit notes** window is identical to the **Credit notes** tab of tab **Client** window, but the **Credit notes to Clients** window contains credit notes for all clients.



Payments

The **Clients: Payments** window contains information on payments from all clients. The layout of this window is similar to the **Payments** tab of the **Client** window. This window also contains the **Mass Payments** button.



Refunds

The **Clients: Refunds** window contains information on refunds to all clients. The layout of this window is similar to the **Refunds** tab of the **Client** window.



Client  
Accounts

The **Client Accounts** window provides a basic balance sheet of your client accounts: total payments, total invoices and general balances of all clients, similarly to the **Accounts** tab of the **Client** window.



Calendar of  
Projects

The **Calendar of Projects** window graphically displays all projects for a selected period, with color distinction for current/due today/overdue **Projects** and so on.

## Freelancers section

The **Freelancers** window can be used to enter and edit freelancer profiles. These include *billing contact information* (like VAT codes), the *postal address* and *payment terms*.

The following tabs may also be of interest to accounting staff:

**Prices of freelancer**

Quotes from freelancer

Freelance Jobs

Purchase orders to freelancer

Payments to freelancer

Additional windows in the **Freelancers** section also provide accounting information:



Prices

With the help of the **Freelancers: Prices** window you can manage a list of general prices for different freelance jobs.



Quotes

In the **Freelancers: Quotes** window all **Quotes** from the database can be viewed and edited.



Freelance  
Jobs

In the **Freelance Jobs** window all freelance jobs of all freelancers can be opened and edited.



POs

In the **Freelancers: POs** window all purchase orders of all freelancers can be viewed and edited.



Payments

In the **Freelancers: Payments** window all payments to all freelancers can be viewed and edited.



Freelancer  
Accounts

The **Freelancer Accounts** window can be used to review the total *Payments*, *POs* and account balances of all freelancers.



Calendar of  
Freelance  
Jobs

In the **Calendar of Freelance Jobs** window all freelance jobs for the selected period are displayed in a graphical view with color distinction for current/due/overdue jobs, allowing one to take in the situation with one glance.

---

See also:

Project manager basic working procedures

Corporate expert basic working procedures

# Corporate expert basic working procedures

*Corporate expert* user accounts can access only certain areas of Projetex. These are:

The **Main** tab — displaying the expert's profile information.

The **Corporate Jobs** tab — displaying all jobs of the expert. This can be used to obtain information on any of the jobs currently assigned. See Corporate Jobs tab (for Expert) for details.

The **JAs** tab — contains the list of all job assignments, issued for this expert. Check this tab to see which of the assigned jobs to begin work with. See JAs tab (for Expert) for details.

The **Payments** tab — contains the list of all payments, given to this expert. See Payments tab (for Expert) for details.

The **Prices** tab — contains the list of the given expert's individual prices. See Prices tab (for Expert) for details.

The **Account** tab — displays a brief summary of selected corporate expert's accounts. See Account of corporate expert for details.

The **Files** tab — provides secure access to this expert's personal folder in the *Business* folder. This folder can contain job files, saved JAs, and any additional data. See Files tab (for Expert) for details.

The **Info** tab — can be used to enter any optional additional information relevant to the selected corporate expert. See Info tab of corporate expert for details.

The **Calendar** tab — shows the calendars of all corporate jobs of the corporate expert. See Calendar of corporate expert for details.

The **Team** and **Experts Knowledgebase** tabs — contain internal guides, manuals and other documentation available to the entire team and to corporate experts specifically.

---

See also:

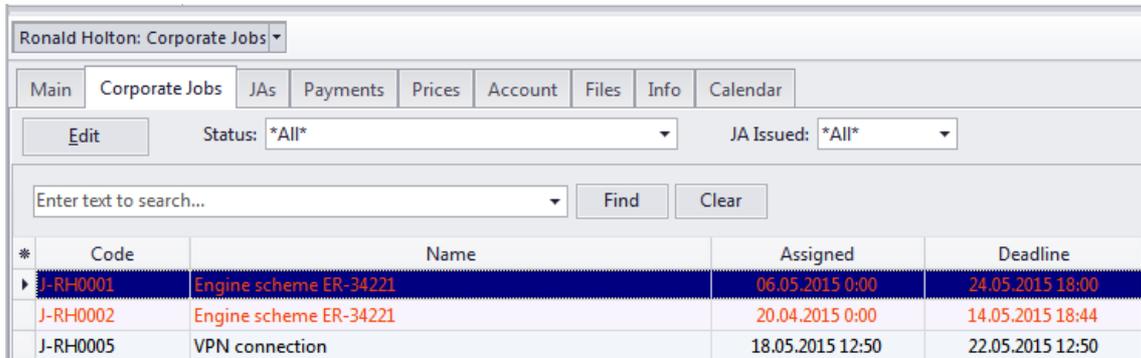
[Project manager basic working procedures](#)

[Accountant basic working procedures](#)

# Corporate Jobs tab (for Expert)

The **Corporate Jobs** tab displays all corporate jobs assigned to the currently logged-in corporate expert. Double-click any of the jobs in the list to edit it.

When you finish your job, double-click it in the list, change the status to **Completed**, insert the completion date and indicate the time spent on this job. To open it select the necessary job and double-click it or click the **Edit** button. See [Editing Corporate Jobs \(for Expert\)](#) for details.



The screenshot shows the 'Corporate Jobs' tab in a software application. At the top, there is a user selection dropdown 'Ronald Holton: Corporate Jobs'. Below it are several tabs: 'Main', 'Corporate Jobs', 'JAs', 'Payments', 'Prices', 'Account', 'Files', 'Info', and 'Calendar'. The 'Corporate Jobs' tab is active. Below the tabs, there is an 'Edit' button, a 'Status' dropdown menu set to '\*All\*', and a 'JA Issued' dropdown menu set to '\*All\*'. Below these is a search bar with the text 'Enter text to search...', a 'Find' button, and a 'Clear' button. The main area contains a table with the following data:

* Code	Name	Assigned	Deadline
J-RH0001	Engine scheme ER-34221	06.05.2015 0:00	24.05.2015 18:00
J-RH0002	Engine scheme ER-34221	20.04.2015 0:00	14.05.2015 18:44
J-RH0005	VPN connection	18.05.2015 12:50	22.05.2015 12:50

## Job status colors

The color of jobs in the list is determined by their completion status.

Black — the job is *completed*

Green — the job is *not completed* yet, deadline in the future

Blue — the job is *due today*

Red — the job is *overdue*

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

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

**Orange background** — *On Hold* status

**Green background** — *Heads-Up* status

**Grey background** — *Canceled* status

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

Just as any other table you can find in Projetex, the **Corporate Jobs** list can be sorted by each column value by clicking the corresponding column's caption.

Click on the asterisk symbol (\*) in the upper right corner of any table to select which columns to display.

## Filtering the corporate jobs list

Using the **Status** drop-down list you can filter the jobs by their status, such as *completed*, *due today*, *overdue*, and so on.

You can also use the **JA Issued** drop-down list to filter the jobs which are included or not included in job assignments (*JAs*).

---

See also:

[Editing Corporate Jobs \(for Expert\)](#)

[JAs tab \(for Expert\)](#)

[Payments tab \(for Expert\)](#)

[Prices tab \(for Expert\)](#)

# Editing Corporate Jobs (for Expert)

**Code** — the unique code of a corporate job is created automatically along with the job itself.

**Name** — this name does not need to include the language pair or service name, since that data is being added separately. By default this is the name of parent client job. Corporate job names can be 100 characters long maximum. Cannot be edited by expert.

**Group** — the group of services. All services in Projetex are broken down into groups. Cannot be edited by expert.

**Service** — each group of services contains a separate list of services. Cannot be changed by corporate expert.

**Volume** — the job's volume can be indicated in a number of units (characters, words, lines, hours and so on). Cannot be edited by expert.

**Price** — The job's price can be indicated as either a flat fee, per-unit fee, or free. Cannot be edited by expert.

**Time spent** — enter the time spent on this job to have its cost automatically calculated according to your AHC.

**JA Folder** — the job assignment folder contains all files an expert would need to begin working on the job. The folder can be accessed by clicking the button on the right side of the address field.

**Timeline** — the timeline of a corporate job in Projetex includes the assigned and deadline dates and the date when the corporate job has been actually completed. Experts can only edit the **Completed** date. Experts cannot edit the **Assigned** or **Deadline** date.

**Special Status** — these are used when a corporate job needs to be put *on hold*, when you create a *heads-up* (or potential) job, or when you need

to be set as completed, since the status assumes that the job was abandoned. Cannot be edited by expert.

**Job Quality** — the job quality field allows the quality of a job performed by a corporate expert to be evaluated. It is represented by a number between 1 and 100. A value of 0 means the job has not been rated. Cannot be edited by expert.

**Instructions** — any instructions or comments of the project manager regarding a corporate job can be viewed here. Cannot be edited by expert.

**Work Notes** — work notes made by the corporate expert can be viewed and edited here.

**Custom Fields** — corporate job information can be customized by adding custom fields for additional information not foreseen by default settings.

 **Note:** Only users with access to the Projetex Server Administrator can add or remove custom fields. See the Custom Fields topic for details.

**Audit** — this tab keeps track of when and by whom the job was modified.

**Alerts** — this tab keeps track of messages received from the Projetex 3D Automation Engine.

You can save the corporate job data in a printable file, print it, or E-mail it with the help of *RTF templates*.

The templates for printing corporate job data can be edited with the help of the **User Settings** menu in the Backstage. Click the **Templates** section to quickly access all template folders. Templates for printing corporate jobs are saved in the *D:\BusinessServer\Templates\EXPERTS\CORPORATE\Jobs* folder.

The screenshot below marks all the areas of the Edit Job window a corporate expert can edit or interact with in a way other than simply viewing.

Edit Corporate Job (Protected mode, 07:00 left)

Corporate Expert: **Ronald Holton** Code: J-RH0006

Details | Instructions | Work Notes | Custom Fields\* | Audit | Alerts

Name: Analog deviation part 3 proofread

Group: Translation

Service: English = Spanish

Volume: 15000 hours <= AnyCount <= CATCount Currency: EUR

Price: 360,00 flat fee <= Prices =>

Total: **360,00**

Time Spent: 15 hours 0 minutes (15 hours)  
Productivity: 1000,00 hours

JA Folder: D:\Business\Experts\Corporate\RH\0003  Create JA

Timeline: =Now =Assigned =Deadline =Now

Assigned: 08/12/2016 12:54 (85 days ago) → Deadline: 21/12/2016 18:00 (72 days ago) →  Completed: 21/12/2016 18:00 (72 days ago)

Special Status: None

Job Quality (0 - not rated, 1 - Extremely Poor, 100 - Excellent): 0

RTF Templates: Corporate Job - Template - English.rtf    

OK Cancel

See also:

[Corporate Jobs tab \(for Expert\)](#)

[JAs tab \(for Expert\)](#)

[Files tab \(for Expert\)](#)

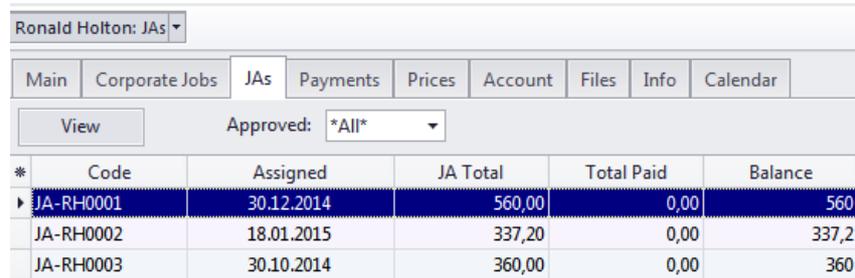
[Payments tab \(for Expert\)](#)

[Prices tab \(for Expert\)](#)

# JAs tab (for Expert)

The **JAs** tab of the **Project** window contains the list of job assignments (*JA*). Double-click a job assignment to view it. Use the **Approved** drop-down list to view only the job assignments which have or have not been approved by project managers.

The information on this tab can be edited only by projects managers.



* Code	Assigned	JA Total	Total Paid	Balance
JA-RH0001	30.12.2014	560,00	0,00	560
JA-RH0002	18.01.2015	337,20	0,00	337,2
JA-RH0003	30.10.2014	360,00	0,00	360

---

See also:

[Corporate Jobs tab \(for Expert\)](#)

[Editing corporate jobs \(for Expert\)](#)

[Files tab \(for Expert\)](#)

[Payments tab \(for Expert\)](#)

[Prices tab \(for Expert\)](#)

# Payments tab (for Expert)

The **Payments** tab contains the list of payments to this corporate expert. Double-click a payment to view it.

Use the **Status** drop-down list to display only payments which are still to be linked with JAs, or only those, that have already been fully linked.

The information on this tab can be edited only by project managers.

* Expert Name	Code	Payment Date	Total Paid
Ronald Holton	P-RH0001	02.06.2017	560,00
Ronald Holton	P-RH0002	02.06.2017	337,20

See also:

[Corporate Jobs tab \(for Expert\)](#)

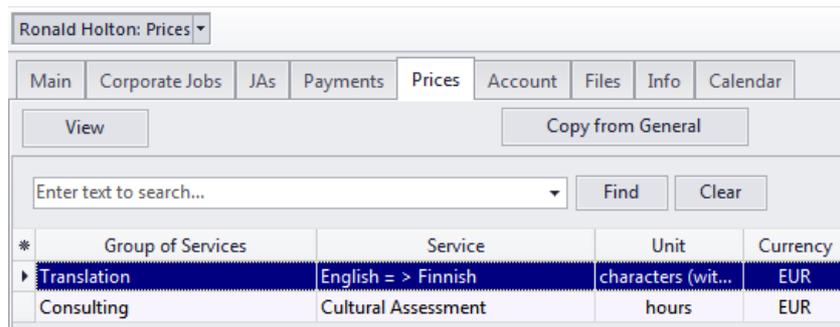
[Editing corporate jobs \(for Expert\)](#)

[Files tab \(for Expert\)](#)

[Prices tab \(for Expert\)](#)

# Prices tab (for Expert)

The **Prices** tab of contains the list of individual prices for the corporate expert. Double-click a price to view it. Prices can be quickly copied from general price-list to individual price-list with the help of **Copy from General** button. Information on this tab can be edited only by projects managers.



* Group of Services	Service	Unit	Currency
▶ Translation	English = > Finnish	characters (wit...	EUR
Consulting	Cultural Assessment	hours	EUR

---

See also:

[Corporate Jobs tab \(for Expert\)](#)

[Editing corporate jobs \(for Expert\)](#)

[Payments tab \(for Expert\)](#)

[Files tab \(for Expert\)](#)

# Files page (for Expert)

You can explore your Projotex folder with the help of the **Files** tab of your Workspace window.

On the **Files** tab you can browse your **Job** folders. You can also open the files in Windows Explorer by clicking the **Explore** button.

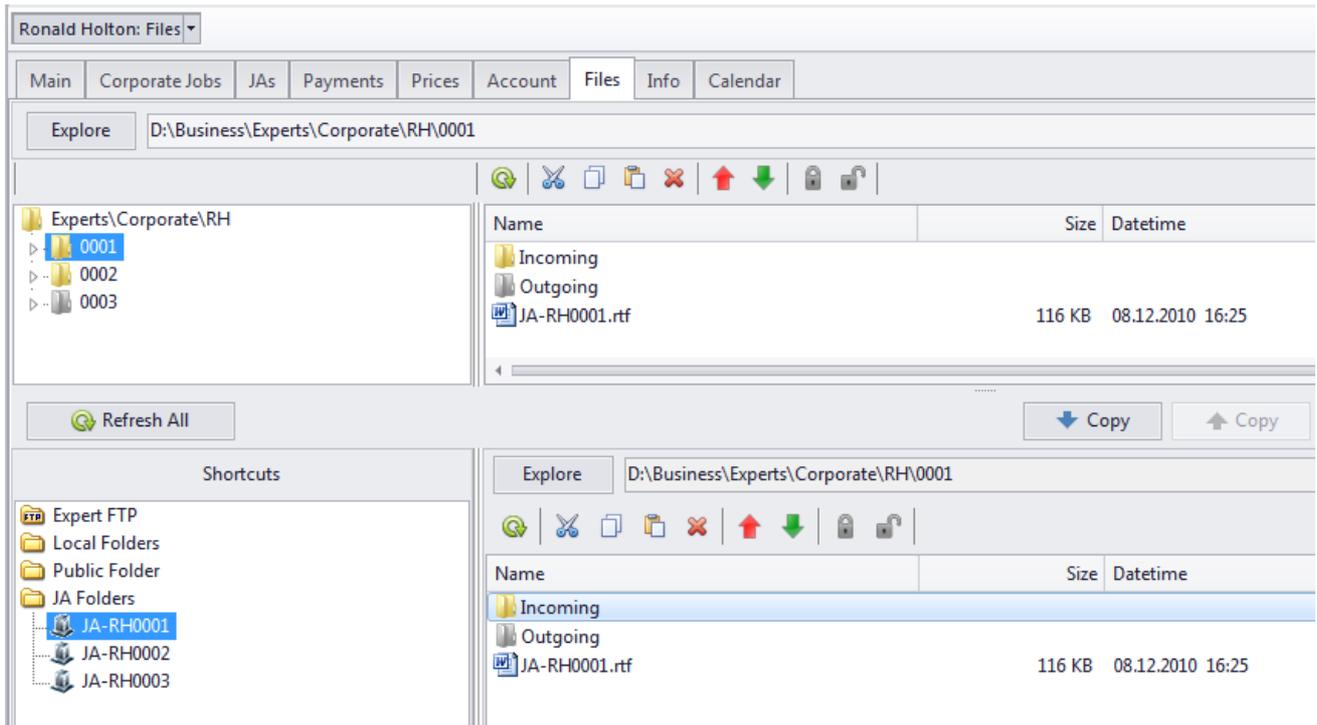
The **Files** tab contains two horizontal panes. The upper pane shows the folder tree for the selected expert folder and the content of the currently selected sub-folder. The pane below allows to use shortcuts.

Clicking any of the **Shortcuts** options will create a second file view field to the right, and open the appropriate folder there. This allows you to simultaneously work with two opened folders in the same window.

**Expert FTP** — access the *FTP browser* and connect to your expert FTP folders.

**Shortcuts** — browse through folders on your PC

**JA folders** — quickly open any of your job assignment folders.



See also:

[Corporate Jobs tab \(for Expert\)](#)

[Edit Corporate Job window \(for Expert\)](#)

[Payments tab \(for Expert\)](#)

[JAs tab \(for Expert\)](#)

[Prices tab \(for Expert\)](#)

# Sorting records

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

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

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

Code	Global Code	Sent
I-INTSEC0002	ACME-10018/201	11.05.2016
I-INTSEC0001	ACME-10017/201	24.07.2016
I-INTID002	ACME-10030/201	06.10.2016

---

See also:

[Grouping records](#)

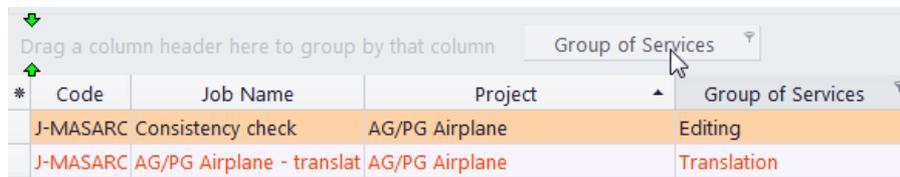
[Moving columns](#)

# Grouping records

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

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

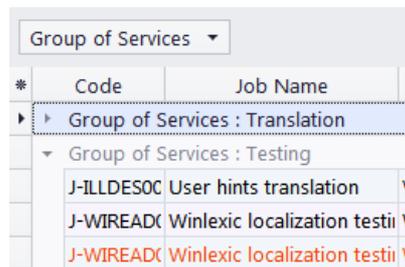
To group a table by a certain column, drag that column's header into the **Group Box**.



A screenshot of a table interface. At the top, there is a grey bar with the text "Drag a column header here to group by that column" and a dropdown menu labeled "Group of Services". Below this, a table is shown with columns: Code, Job Name, Project, and Group of Services. The first row is highlighted in orange and contains: J-MASARC, Consistency check, AG/PG Airplane, and Editing. The second row contains: J-MASARC, AG/PG Airplane - transl, AG/PG Airplane, and Translation.

* Code	Job Name	Project	Group of Services
J-MASARC	Consistency check	AG/PG Airplane	Editing
J-MASARC	AG/PG Airplane - transl	AG/PG Airplane	Translation

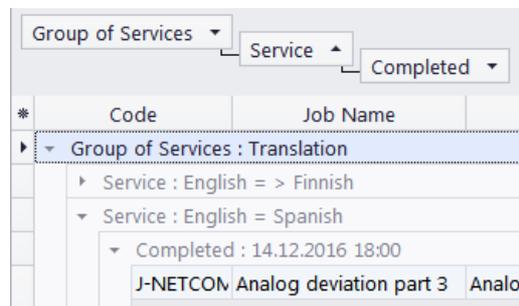
The table will be displayed as a list of Groups (values of the column). You can click a Group to expand or collapse it.



A screenshot showing a table grouped by the "Group of Services" column. The table has columns: Code, Job Name, and a third column. The "Group of Services" column is expanded to show "Translation". Under "Translation", there are three rows: J-ILLDESOC User hints translation, J-WIREADC Winlexic localization testi, and J-WIREADC Winlexic localization testi.

* Code	Job Name	
Group of Services : Translation		
Group of Services : Testing		
J-ILLDESOC	User hints translation	V
J-WIREADC	Winlexic localization testi	W
J-WIREADC	Winlexic localization testi	W

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



A screenshot showing a table grouped by multiple columns: "Group of Services", "Service", and "Completed". The "Group of Services" column is expanded to show "Translation". Under "Translation", there are two sub-groups: "Service : English = > Finnish" and "Service : English = Spanish". Under "Service : English = Spanish", there is a sub-group "Completed : 14.12.2016 18:00". Under "Completed : 14.12.2016 18:00", there is one row: J-NETCON Analog deviation part 3 Analog.

* Code	Job Name	
Group of Services : Translation		
Service : English = > Finnish		
Service : English = Spanish		
Completed : 14.12.2016 18:00		
J-NETCON	Analog deviation part 3	Analog

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

See also:

[Sorting records](#)

[Moving columns](#)

# Columns Customization

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

1. Click the Asterisk symbol in the upper-right corner of a table to display a list of columns, available for that table.
2. Choose columns which should be displayed by selecting the appropriate check boxes.

<input checked="" type="checkbox"/> *	Code	Job Name	
<input type="checkbox"/>	Client		<input type="checkbox"/> Price (EUR)
<input checked="" type="checkbox"/>	Code		<input checked="" type="checkbox"/> Rate
<input checked="" type="checkbox"/>	Job Name		<input checked="" type="checkbox"/> Job Total
<input type="checkbox"/>	Project Code		<input checked="" type="checkbox"/> Job Total (EUR)
<input checked="" type="checkbox"/>	Project		<input checked="" type="checkbox"/> Currency
<input type="checkbox"/>	Client Ref.		<input type="checkbox"/> Client PO
<input checked="" type="checkbox"/>	Assigned		<input checked="" type="checkbox"/> Invoice Global Code
<input checked="" type="checkbox"/>	Deadline		<input type="checkbox"/> Invoice Code
<input checked="" type="checkbox"/>	Completed		<input checked="" type="checkbox"/> Job Paid Status
<input checked="" type="checkbox"/>	Group of Services		<input checked="" type="checkbox"/> Project Manager
<input checked="" type="checkbox"/>	Service		<input checked="" type="checkbox"/> Client Product Line
<input checked="" type="checkbox"/>	Pricing		<input checked="" type="checkbox"/> Client PM
<input checked="" type="checkbox"/>	Price		<input type="checkbox"/> Priority
<input checked="" type="checkbox"/>	Units		<input type="checkbox"/> Specialization
<input checked="" type="checkbox"/>	Volume		<input type="checkbox"/> Additional PO ref.
<input type="checkbox"/>	Volume (words)		<input type="checkbox"/> Status

---

See also:

[Moving columns](#)

[Tables with Pages](#)

# Moving columns

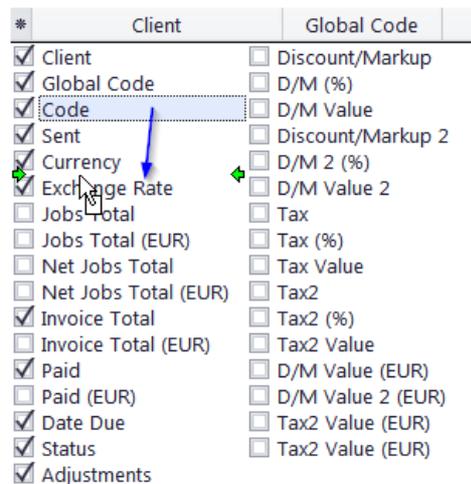
You can easily change the order of the columns displayed. To change column order:

1. Click the *column caption* and hold the mouse button.
2. Drag your cursor without releasing the mouse button, to the desired column.
3. Release mouse button. The column will be moved to the place indicated by the green arrows.



Currency	Exchange Ra	Invoice Total	Paid
EUR	1,00	2 250,00	2 250,00
EUR	1,00	175,00	175,00
EUR	1,00	1 660,50	1 660,50

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



*	Client	Global Code
<input checked="" type="checkbox"/>	Client	<input type="checkbox"/> Discount/Markup
<input checked="" type="checkbox"/>	Global Code	<input type="checkbox"/> D/M (%)
<input checked="" type="checkbox"/>	Code	<input type="checkbox"/> D/M Value
<input checked="" type="checkbox"/>	Sent	<input type="checkbox"/> Discount/Markup 2
<input checked="" type="checkbox"/>	Currency	<input type="checkbox"/> D/M 2 (%)
<input checked="" type="checkbox"/>	Exchange Rate	<input type="checkbox"/> D/M Value 2
<input type="checkbox"/>	Jobs Total	<input type="checkbox"/> Tax
<input type="checkbox"/>	Jobs Total (EUR)	<input type="checkbox"/> Tax (%)
<input type="checkbox"/>	Net Jobs Total	<input type="checkbox"/> Tax Value
<input type="checkbox"/>	Net Jobs Total (EUR)	<input type="checkbox"/> Tax2
<input checked="" type="checkbox"/>	Invoice Total	<input type="checkbox"/> Tax2 (%)
<input type="checkbox"/>	Invoice Total (EUR)	<input type="checkbox"/> Tax2 Value
<input checked="" type="checkbox"/>	Paid	<input type="checkbox"/> D/M Value (EUR)
<input type="checkbox"/>	Paid (EUR)	<input type="checkbox"/> D/M Value 2 (EUR)
<input checked="" type="checkbox"/>	Date Due	<input type="checkbox"/> Tax2 Value (EUR)
<input checked="" type="checkbox"/>	Status	<input type="checkbox"/> Tax2 Value (EUR)
<input checked="" type="checkbox"/>	Adjustments	

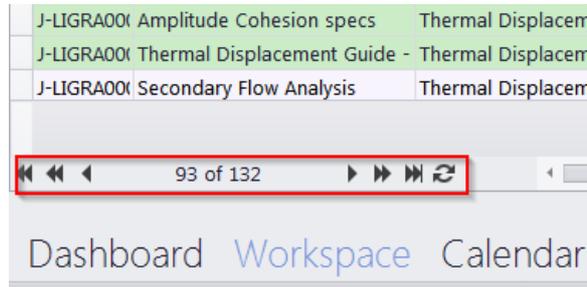
To open the **Customize Columns** window, click the Asterisk symbol \* in the upper-right corner of a table.

See also:

Columns Customization

# Tables with Pages

Some tables in Projetex can contain a lot of records. For example, the **Projects** or **Invoices** table can contain thousands and tens thousands of records. Projetex breaks such tables into pages. A "Page" is all the records visible in the program window at any given time.



The page navigation buttons are as follows:

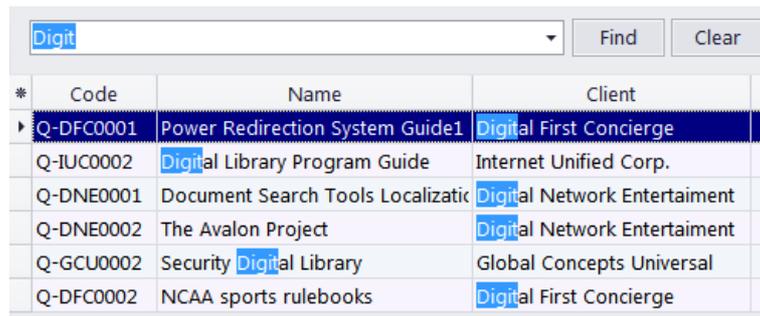
- ◀ - switch to the previous record
  - ▶ - switch to the next record
  - ◀◀ - jump to the first record on the current page or switch to the previous page if already there
  - ▶▶ - jump to the last record on the current page or switch to the next page if already there
  - ◀◀◀ - jump to the first record
  - ▶▶▶ - jump to the last record
- 

See also:

Find Panel

# Find Panel

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



The screenshot shows a search interface with a text input field containing 'Digit', a 'Find' button, and a 'Clear' button. Below the input is a table with three columns: Code, Name, and Client. The table contains six rows of data, with the first row highlighted in blue. The search term 'Digit' is highlighted in blue within the Name and Client columns of the first row.

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

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

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

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

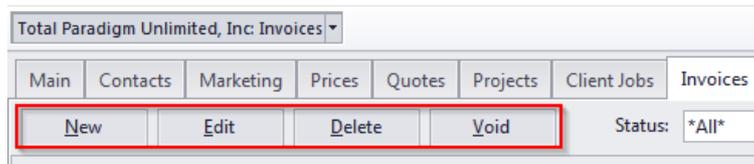
---

See also:

Tables with Pages

# Hotkeys

Hotkeys are special combinations of keys that allow users to quickly navigate the program and open the necessary windows. The main kind of hotkey available in Projetex is the Alt + <underlined character> hotkey.



When ever you see a button with an underlined character in it's name, press Alt + the underlined character to open the corresponding window without clicking the button.

# Client Product Lines

Projetex features a product line-based project management system. A single product line project manager can be assigned not to a client, but to a client's product line. This implies the following:

- multiple product lines can be created for a client
- multiple product line project managers can be assigned to a product line
- each project can only belong to one product line

In terms of organization and project hierarchy product lines group an number of projects, while product lines themselves are being grouped by clients.

Each new client has a single default product line (*Main*) and the user who added the client to the database is automatically assigned as the product line project manager of this product line. So, unless any new product lines are created, a single product line project manager is assigned to a client, in other words one client equals one product line. Thus in this case the term product line implies a certain client and all projects of this client. The only difference is that in Projetex multiple project managers can be assigned to a client product line.

However, if the project flow of a client is strong, it might be reasonable to split the client's projects into a number of product lines, each of which can be assigned to a different product line project manager (or a number of managers). This should help optimize the workload balance between line project managers.

Product lines and their managers can be viewed on the client's Profile.

Profile	Custom Fields	Audit	Alerts
Code:	RELNET		
Name:	Reliable Network, Inc		
Postal Address:	Wergelandsveien 5 Oslo Norway		
			
	Now: 28.03.2017 11:39		
Project Managers:	Main: William McSun test: William McSun, Bartholomeo Rodriges		

---

See also:

[Creating Product Lines](#)

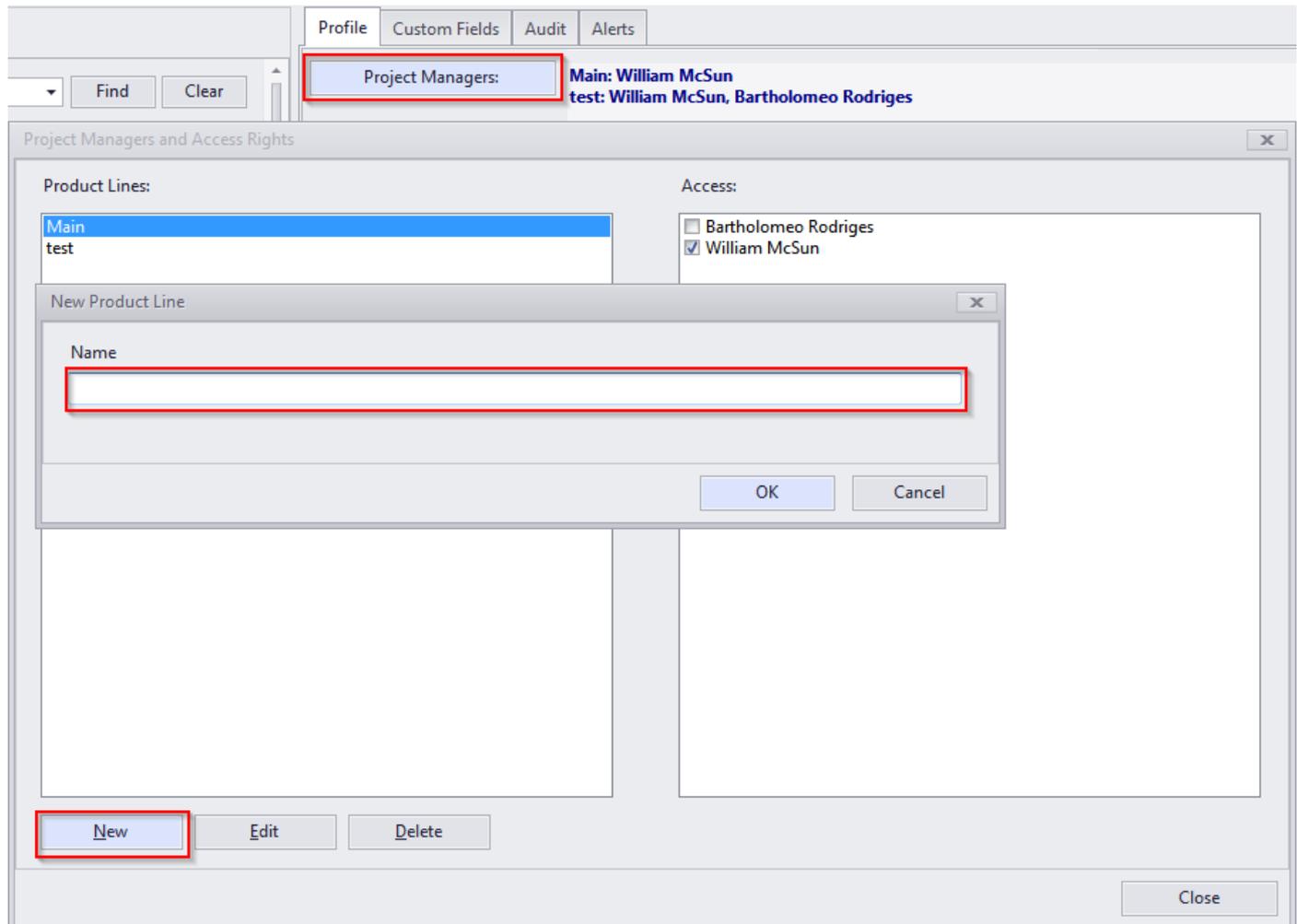
[Product Line Project Managers](#)

# Creating Product Lines

Product lines can be created for any of the existing clients by any user with *Advanced* access rights (must be set in Projetest Server Administrator).

To create a new client product line for one of the clients:

1. Open the **Main** tab of the **Client** window.
2. Click the **Project Managers** button
3. Click the **New** button and enter the name of the new Product Line. You will be automatically assigned as its product line project manager.



See also:

[Client Product Lines](#)

[Product Line Project Managers](#)

# Product Line Project Managers

Any number of product line project managers can be assigned to any client product line at any time. When assigning line project managers, it should be taken into account that users with Normal (product line project manager) access rights:

- Will be able to view all projects, which belong to their product lines.
- Will be able to view only those clients, with whom they are assigned as project manager of at least one product line.
- Will be able to view any projects, to which they have been assigned as project managers.
- Will be able to create projects only within product lines which they have been assigned.

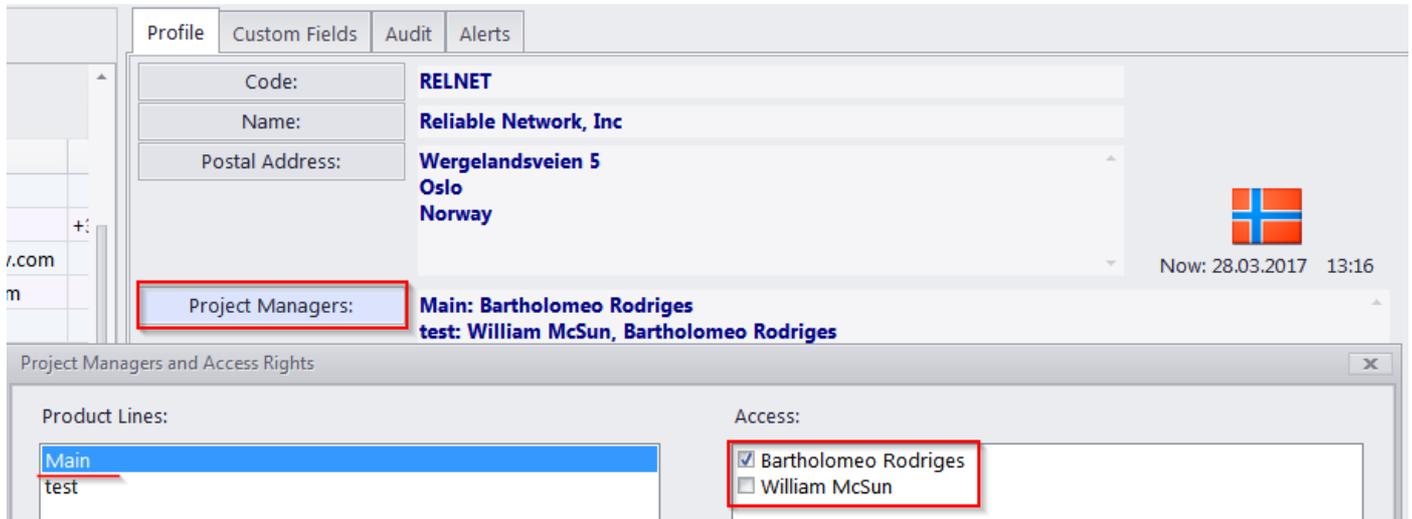
 **Note:** Access rights for each user can be set in the **Users and Access** section of the **Projetex Workstation Administrator** tab in the Backstage view. Existing product lines with currently assigned product line project managers are displayed on the **Client Profile** tab.

## Assigning and removing product line project managers

To assign or remove a product line project manager, you need to have Advanced access rights.

Click "**Project managers**" on the client profile.

Select the product line you wish to alter access right for, and check or uncheck the employees you wish to assign or remove as product line project managers for it



The screenshot displays the 'Profile' tab of a client profile in the Projctex Workstation Administrator. The client details include:

- Code: RELNET
- Name: Reliable Network, Inc
- Postal Address: Wergelandsveien 5, Oslo, Norway
- Country: Norway (indicated by a flag icon)
- Time: Now: 28.03.2017 13:16

The 'Project Managers' section is highlighted with a red box, showing:

- Main: Bartholomeo Rodrigues
- test: William McSun, Bartholomeo Rodrigues

Below this, a 'Project Managers and Access Rights' dialog box is open. It shows a list of product lines with 'Main' selected. The 'Access' section for the selected product line is also highlighted with a red box, showing:

- Bartholomeo Rodrigues
- William McSun

See also:

[Client Product Lines](#)

[Creating Product Lines](#)

# Currencies Management

In Projetex, you can assign an individual client currency to each client or prospect, and an expert currency to each freelancer, applicant or corporate expert, and still be able to see 'the whole picture' through your base currency. This chapter will help you understand how currencies are handled in Projetex.

First of all, let us give the definitions for the terms used in this chapter:

- The *Base currency* is the currency in which your company makes all internal accounting records, i.e. project balance, taxes, the salaries of your corporate experts, corporate expenses and so on. In most cases, it is the currency of your country.
- The *Client currency* is the currency in which you produce invoices for your client and receive payments from your client.
- The *Expert currency* is the currency in which you produce purchase orders and job assignments and make payments to your experts and vendors.

Example:

If your company is in the UK, your client is from USA and your freelance expert is from Japan, your *base currency* will be the Pound Sterling, the *client currency* will be the US Dollar, and the *expert currency* will be the Japanese Yen.

In Projetex, you can easily produce invoices, link them with payments from clients and record them in client currencies. Projetex will automatically make parallel records in the base currency of your company.

You may issue POs and JAs, and make payments to experts in *any currency*, and Projetex will automatically record your POs, JAs and payments in *experts' currencies*.

These parallel records in your base currency enable all your internal company accounting to be done in your base currency, while still keeping the records in other currencies.

To make these parallel records possible, you only have to enter the currency rates for the currencies of your clients and experts. You may also easily change the currency rates for each recorded client job or for all future jobs.

---

See also:

Base Currency

Client/Expert Currencies

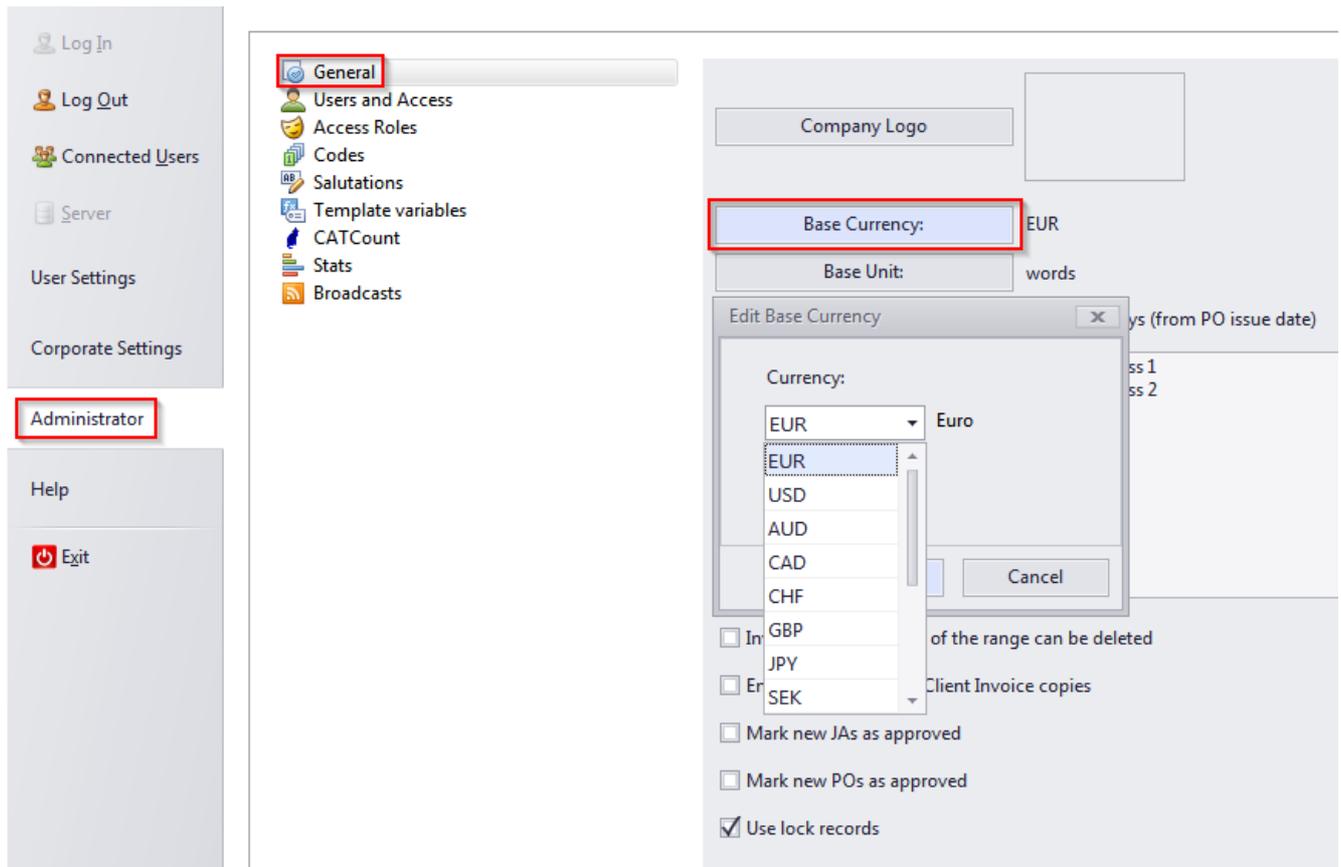
# Base Currency

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

The base currency can be changed on the **Administrator** tab of Projetex Administrator Workstation.

To change our base currency, do the following:

- Log into your Projetex Workstation as an Administrator.
- Click the **Backstage view** button.
- Switch to the **Administrator** tab and click **General**.
- Click the **Base Currency** button and select the necessary currency in the **Edit Base Currency** window:
- Make sure that the base currency is set correctly before starting your work in Projetex.



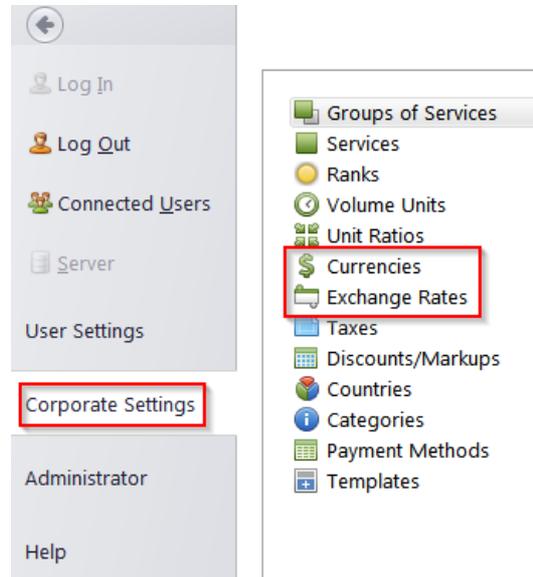
See also:

Currencies Management

# Adding Currencies and Exchange Rates

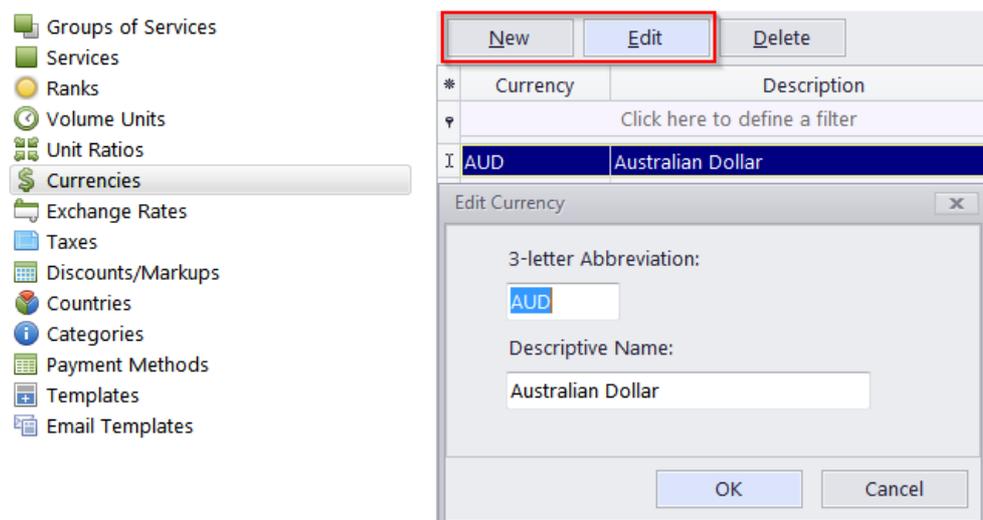
## Adding new currencies

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



To define currency settings:

1. Open the Projotex Workstation and select **Corporate Settings** in the **Backstage** view.
2. In the **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 the **New** button. You can also edit or delete existing currencies.



## Setting exchange rates

You can set the *exchange rates* between your base currency and any of the other currencies. Exchange rates of currencies are used for parallel record-keeping in both the base currency and the expert/expert currencies relating to your base currency.

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

To add a new currency exchange rate, click the **New** button.

Select a currency from the drop-down list, enter its rate relating to your *base currency* and click **OK**.

- Groups of Services
- Services
- Ranks
- Volume Units
- Unit Ratios
- Currencies
- Exchange Rates
- Taxes
- Discounts/Markups
- Countries
- Categories
- Payment Methods
- Templates
- Email Templates

New
Edit
Delete

*	Currency	=EUR	Description
Click here to define a filter			
I	AUD	0,6757	Australian Dollar
	CAD	0,6721	Canadian Dollar
	CHF	0,92	Swiss Franc
	GBP	1,1338	British Pounds
	JPY	0,0081	Japanese Yen
	SEK	0,1024	Swedish Krona
	USD	0,8954	US Dollars

Edit Exchange Rate
✕

1 AUD = EUR 0,6757

OK
Cancel

⏪ ⏩
1 of 7
⏴ ⏵ ↺

Automatically download exchange rates  
 every 1 days

Last updated on 22.06.2017

---

See also:  
Currencies Management

# Client/Expert Currencies

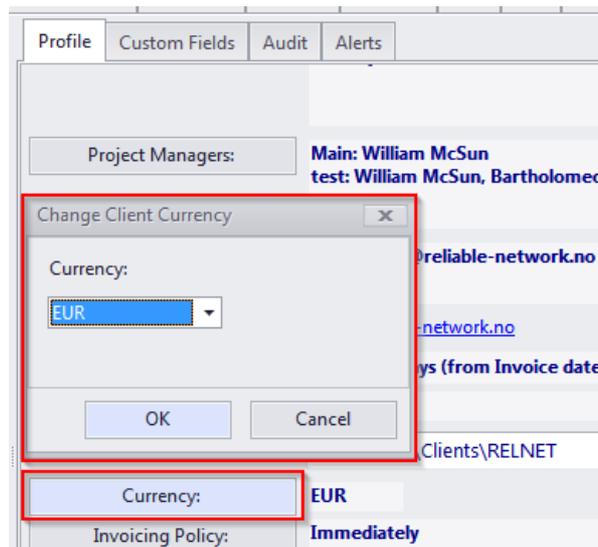
When you add a new *client* (*prospect*) or *expert* (*corporate, freelance or applicant*) to your database, you have to define the *currency* of this *client* or *expert*.

All the prices, quotes, invoices and payments related to the *client/expert* will be recorded in the currency you defined. That is why it is important to define the *client/expert* currency before entering any financial records.

**Note:** If you encounter a rare case when your transactions with a particular *client/expert* involve more than one currency, you can create two separate *client/expert* records (for instance, if client's/expert's name is Alpha, you can create an Alpha-USD record with client/expert currency: USD and an Alpha-EUR record with client/expert currency: EUR). This way this *client/expert* will have two separate accounts in your database, one for each currency.

On the **Main** tab of the **Prospects/Clients/Corporate Team/Applicants/Freelancers** window, you may change the currency of your *client/expert* by clicking the **(Expert) Currency** button.

It is best to modify the *client/expert* currency only before the first financial record for this *client/expert* has been recorded (price, quote, job, invoice or payment). However, if you find that you have been entering the data with an incorrectly chosen currency, you can still change the currency to the right one, after answering **Yes** to program warning.



**Note:** If you change currency after some financial record for this *client/expert* has been recorded (price, quote, job, invoice or payment), all these financial records will NOT be recalculated.

---

See also:

Currencies Management

# Currencies in Prices

In Projetex you can specify an individual currency for each client's and freelancer's financial records. It can differ from your base currency.

When you enter the prices for your *client* or *freelancer*, the currency is displayed in the bottom left part of the **New/Edit Price** window.

When you create or edit a client/freelancer job, the job cost (*Total*) is displayed in the client/freelancer currency. The *client/freelancer currency* is indicated by a green font to the right of the total.

If the client/freelancer currency differs from your base currency, the **Currency Exchange Rate** button will be available. By clicking this button, you can change the *currency exchange rate* used in this *job*. Note that this button does not change the general exchange rate stored in your Projetex database. To change the exchange rate for all future jobs go to Exchange Rates tab of the Corporate Settings area in the Backstage view.

The screenshot shows the 'New/Edit Price' window with the following fields: Name: Amplitude Cohesion specs; Group: Editing; Service: Proofreading; Volume: ; Price: ; Total: 7,00; Folder: D:\Business\Pr; Timeline: . An 'Edit Exchange Rate' dialog box is open, showing 'Valid for Current Financial Record:' and '1USD=EUR 0,77'. The dialog has 'OK' and 'Cancel' buttons. In the background, the 'Client Currency: USD' is displayed in green, and a button shows '1 USD = 0,77 EUR'. Other buttons include 'Count', 'Create Invoice', '=Deadline', and '=Now'.

**Note:** If the job is already added to the invoice, the button with the exchange rate will be disabled.

In the **Project Accounts** window, all records are displayed in your base currency.

See also:

Currencies Management

# AnyCount in Projetex

## Introduction

AnyCount is a text count engine, which automatically calculates text volumes contained in a file (or files). Counting can be done in different volume units (words, characters with spaces, characters without spaces, lines, tabs, custom units). AnyCount works with most common file formats.

Projetex has a built-in version of AnyCount 3D Enterprise to make job creation and expense calculation for each job quicker and easier.

AnyCount 3D currently counts the following formats: DOC, DOCX, RTF, XLS, XSLX, PPT, PPS, PPTX, PPSX, PUB, VSD, VSDX, ODT, SXW, SDW, ODS, SXC, SDC, ODP, SXI, SDD, TXT, CSV, GIF, PNG, BMP, JPG, PDF, HTML, XML, HLP, CHM, WPD, SLP, MIF, ZIP, RAR.

In Projetex, AnyCount is used to quickly calculate the volumes of new jobs and quotes. AnyCount options can be found in the following windows: **New/Edit Draft Client Job**, **New Client Job (Edit Client Job)**, **New Corporate Job (Edit Corporate Job)** and **New Freelance Job (Edit Freelance Job)**.

## Counting files

In Projetex, AnyCount is used in the following way:

When creating a job or a quote, click the **<= AnyCount** button to run AnyCount. It will automatically count the required units in the target file(s) and enter the result into the **Volume** field.

To use AnyCount in Projetex, do the following:

1. Select the volume units from the corresponding drop-down list and click the **<= AnyCount** button.
2. Select the file to be counted in the **Open** window and either double click it or click the **Open** button:
3. The AnyCount Engine will count the text in the selected file(s) and enter the count results are to the **Volume** field of the **New/Edit Job** window.
4. An expanded count report will be added to the **Notes** tab which appears after AnyCount is used.
5. If you see that the volume units should be changed to other ones, you can select the volume units from the corresponding drop-down list. The count results and the *AnyCount Notes* will be changed automatically.

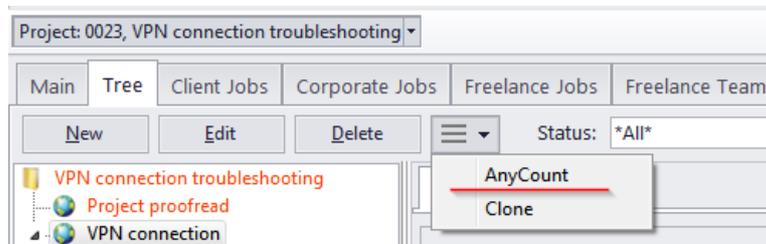
**Note:** If the units selected were not specified as "Used by AnyCount" you will not be able to perform the count. This option is available in the AnyCount section of User Settings in the Backstage view. It was implemented to distinguish volume units, that cannot be used as text volume units (e.g. "hours").

The screenshot shows the 'Edit Freelance Job' window in Projetex. The window title is 'Edit Freelance Job (Protected mode, 15:00 left)'. The project is '0050, Proofread www.enigmaservertech.com', the client account is 'Main', and the freelancer is 'Hilda Herald'. The 'Details' tab is selected, showing fields for Name, Group, Service, Volume, and Price. The Volume field is set to '29984 words'. The Price field is set to '0,02 per unit'. The 'AnyCount' button is highlighted with a red box. The total amount is '599,68'.

Field	Value
Name	Proofread www.enigmaservertech.com (image captions translation)
Group	Editing
Service	Proofreading
Volume	29984 words
Price	0,02 per unit
Total	599,68

## Creating a client job based on counted file(s)

Click the **More...** button on the **Tree** tab of the **Project** window and select **AnyCount**. Select the volume unit to count with in and click **OK** button. Select file(s) to count. Once the count process is completed, Projetex will create a new client job with the name of the counted file, and the appropriate volume and volume units. If you chose to count multiple files, the program will ask you if you want to create a single job for all selected files or a separate job for each file.



---

See also:

[AnyCount settings](#)

[CATCount in Projtex](#)

# CATCount in Projetex

## Introduction

CATCount is a tool for calculating Computer Assisted Translation (CAT) costs. In Projetex, CATCount is used for computer assisted translation job accounting. The primary functions of CATCount are:

- Translating complex *CAT Schemes* (different rates and counts for different types of text) into a single text count number, i.e. the CAT count.
- Importing CAT counts from Trados Translator's Workbench and Logoport logs.
- Printing *CAT Schemes* together with original word counts.

CATCount options can be found in the following Projetex windows: **New/Edit Draft Client Job**, **New Client Job (Edit Client Job)**, **New Client Job (Edit Client Job)** and **New Freelance Job (Edit Freelance Job)**.

## Interface

In Projetex, CATCount is used in the following way.

When you open a **New Job** window you specify the job name, group and service at first.

CATCount comes in handy when you want to specify the volume of the job and calculate its cost using a CAT Scheme. The result will be automatically entered into the **Volume** field.

When you create a job or a quote and click the **<=CATCount** button, you will open the CATCount window. With the help of this window you can enter word counts for different match types, and their respective rates. CATCount automatically calculates an equivalent CAT count and enters the resulting number into the **Volume** field.

The screenshot shows the 'Edit Client Job' window in Projetex. The title bar reads 'Edit Client Job (Protected mode, 13:00 left)'. The main area displays job details: Client: Total Paradigm Unlimited, Inc; Project: 0057, AccountPro localization testing; Client Account: Main; Client PM: John Stevenson; Code: J-T; Client Ref.; Client PO. Below this is a tabbed interface with 'Details' selected. The 'Details' tab shows: Name: AccountPro localization testing; Group: Testing; Service: Testing of Localized Software; Volume: 60900 words. At the bottom right of the 'Details' tab, there are two buttons: '<= AnyCount' and '<= CATCount'. The '<= CATCount' button is highlighted with a red dashed border.

## Creating CAT counts

1. Click the **<=CATCount** button in the **New/Edit Job** window.
2. Enter the number of words with different match levels (100% match, "fuzzy" match and so on), and the percentages of full rate payment for each level, i.e. the CAT Scheme.

CATCount - example2.cat

Scheme Log Output

Match types:	Words:	Percentage payment of full word rate:	Equivalent wordcount to be paid at full word rate:
Perfect Match	0	x 0 %	= 0
Context Match	0	x 0 %	= 0
XTranslated	0	x 0 %	= 0
Repetitions	0	x 0 %	= 0
Cross-file Repetitions	0	x 0 %	= 0
100% Matches	0	x 0 %	= 0
95% - 99%	0	x 0 %	= 0
85% - 94%	0	x 30 %	= 0
75% - 84%	0	x 30 %	= 0
50% - 74%	10000	x 30 %	= 3000
Internal Fuzzies 95% - 99%	0	x 50 %	= 0
Internal Fuzzies 85% - 94%	0	x 50 %	= 0
Internal Fuzzies 75% - 84%	10000	x 50 %	= 5000
Internal Fuzzies 50% - 74%	10000	x 60 %	= 6000
No Match	10000	x 100 %	= 10000

<b>Total wordcount:</b>	<b>40000</b>
<b>Total CATCount:</b>	<b>24000</b>

OK Cancel

- To save a scheme click the **Save** in the **Scheme** menu.
- To load a scheme click **Load** in the **Scheme** menu.

 **Note:** To load word count analysis logs from Trados Translator's Workbench click the **Load** command in the **Log** menu.

3. Click **OK** to enter the Total CATCount number into the **Volume** field.

An expanded count report is added to the **CATCount Notes** tab which appears after CATCount is used.

See also:

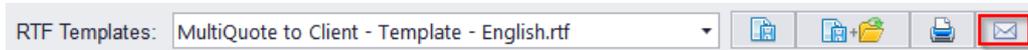
CatCount settings

AnyCount in Projetex

# Mail Sender

Use the Projetex **Mail Sender** to quickly create template-based documents and send them to your clients and experts without using an outside e-mail client.

The Mail Sender is accessed via the **Send Mail** button near the bottom right corner of the price lists and the **New/Edit** windows of **Quotes, Projects, Jobs, Payments** and other documentation.

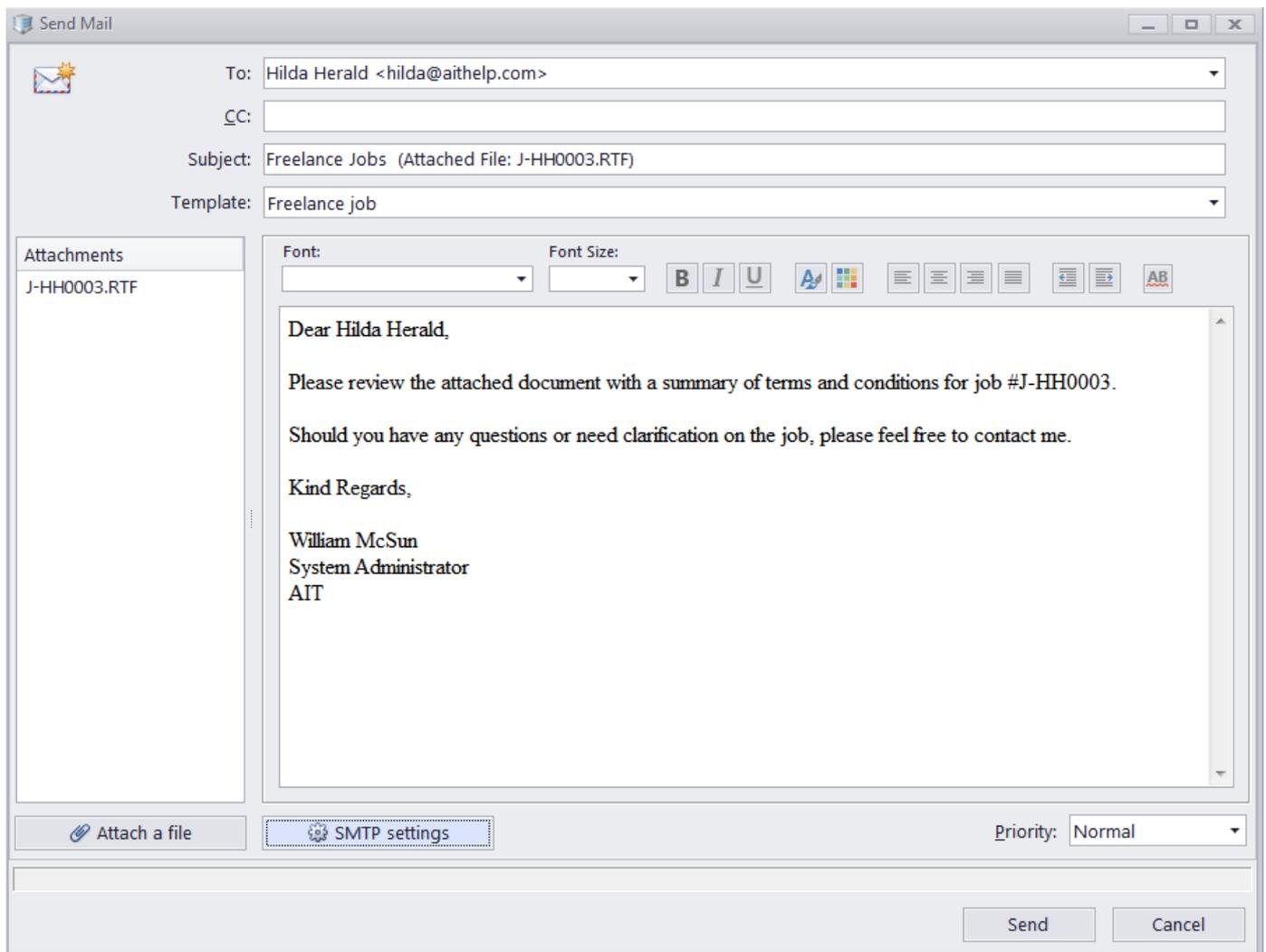


The Mail Sender opens with the template-based document already attached, the subject line containing the name of the table and attached file, the appropriate mail template applied to the body of the message, and addressed to the client/expert associated with the document.

You can select a new e-mail template or edit the body of the letter manually, change the address and subject, add CC addresses, attach more files and set the letter's priority.

If you have not set up your Email parameters yet, you can do so right here by clicking **SMTP Settings**.

Click **Send** to send the e-mail to all the selected addresses.



See also:

Mail Settings

Email Templates

# Navigation Bar

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

Dashboard **Workspace** Calendar Reports Knowledgebase

## Dashboard

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

## Workspace

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

## Calendar

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

## Reports

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

## Knowledgebase

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

---

See also:

Ribbon

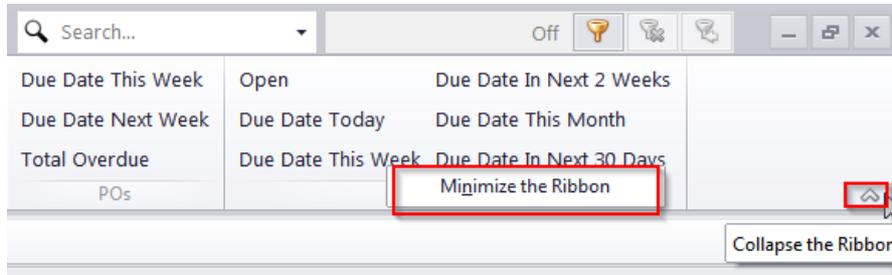
# Ribbon

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

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

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

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



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

---

See also:

[Dashboard Icons](#)

[Workspace Icons](#)

[Calendar Icons](#)

[Reports Icons](#)

[Knowledgebase Icons](#)

# Dashboard Icons

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

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

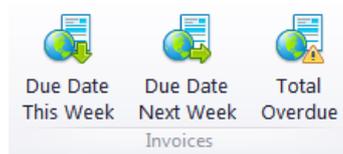
The icons are separated into four groups, according to the subject matter of the widgets.

## Client Job Widgets



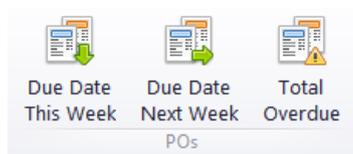
The Client Job widgets display the number and total volume of the corresponding client jobs, Except for "Not Invoiced Total", which displays the total value in the Base Currency rather than volume.

## Invoice Widgets



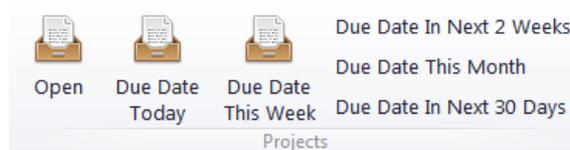
The Invoice widgets display the number of corresponding invoices. "Total Overdue" also displays the total value in the Base Currency.

## PO Widgets



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

## Project Widgets



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

---

See also:

Ribbon

Dashboard

# Workspace Icons

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

For ease of navigation, the Ribbon is divided into six tabs: **Prospects, Clients, Projects, Corporate Team, Freelancers, Freelancers.**

## The Prospects tab

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

## The Clients tab

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

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

## The Projects tab

 Project	The <b>Project</b> window displays a list of projects and all information about the selected project. Project data is broken into the following tabs: <b>Main, Tree, Client Jobs, Corporate Jobs, Freelance Jobs, Freelance Team, JAs, POs, Account, Files, Info, Calendar.</b>
 Client Jobs	The <b>Projects: Client Jobs</b> window displays a list of all client jobs stored in the database. With the help of this window you can have a quick overview of all client job statuses, calculate client job totals and edit existing client jobs.
 Corporate Jobs	The <b>Projects: Corporate Jobs</b> window displays a list of all jobs created for in-house experts. With the help of this window you can have a quick overview of all corporate job statuses, calculate corporate job totals and edit existing corporate jobs.
 Freelance Jobs	The <b>Projects: Freelance Jobs</b> window displays a list of all jobs created for freelance experts. With the help of this window you can have a quick overview of all freelance job statuses, calculate freelance job totals and edit existing freelance jobs.
 Project Accounts	The <b>Project Accounts</b> window displays the profitability of specific projects as well as Gross Profitability analysis. Can be viewed only in the Base Currency.

## The Corporate Team tab

 Corporate Expert	The <b>Corporate Expert</b> window displays a list of employed in-house experts and consolidated information about the selected in-house expert. Corporate expert data is broken into the following tabs: <b>Main, Corporate Jobs, JAs, Payments, Prices, Account, Files, Info, Calendar.</b>
 Prices	The <b>Corporate Experts: Prices</b> window provides access to a general list of tariffs for corporate expert services. Here you can define a specific price in a specific currency for each service.
 Corporate Jobs	The <b>Corporate Jobs</b> window displays a list of all jobs created for in-house experts. With the help of this window you can have a quick overview of all corporate job statuses, calculate corporate job totals and edit existing corporate jobs.
	

 Job Assignments	The <b>Corporate Experts: Job Assignments</b> window displays a list of all currently issued job assignments for corporate jobs. Here you can edit existing JAs.
 Payments	The <b>Corporate Experts: Payments</b> window lists all of the payments sent to all corporate experts. Use this window to calculate payment totals, link payments with job assignments, and edit existing payments.
 Corporate Accounts	The <b>Corporate Accounts</b> window displays a simplified balance sheet broken into entries for each corporate expert and based on job assignments and payments to corporate experts. Accounting staff can use this window to identify which accounts require attention. Can be viewed in the Base Currency or Expert Currencies.
 Corporate Expenses	The <b>Corporate Expenses</b> window can be used to make and view entries about any expenses that are not connected to paying in-house and freelance experts.

## The Applicants tab

 Applicant	The <b>Applicant</b> window displays a list of applicants for the position of freelance expert and consolidated information about the selected applicant. Applicant data is broken into the following tabs: <b>Main, Application, Prices, Quotes, Applicant Jobs, POs, Payments, Files, Info</b> . Note that you can not assign Jobs, create POs or Payments for applicants. The purpose of those tables in this tab is to store the documentation of temporarily or permanently inactive freelancers.
 Prices	The <b>Applicants: Prices</b> window provides access to a general list of tariffs for prospective freelance expert services. Here you can define a specific price in a specific currency for each service. This list also appears in the <b>Freelancers: Prices</b> window.
 Quotes	The <b>Applicants: Quotes</b> window displays a list of all quotes from applicants stored in the database.
 Applicant Jobs	The <b>Applicant Jobs</b> window displays a list of all jobs created for temporarily or permanently inactive freelancers.
 POs	The <b>Applicants: POs</b> window displays a list of all purchase orders issued for temporarily or permanently inactive freelancers.
 Payments	The <b>Applicants: Payments</b> window displays a list of all payments sent to temporarily or permanently inactive freelancers.

## The Freelancers tab

 Freelancer	The <b>Freelancer</b> window displays a list of freelance experts and consolidated information about the selected freelancer. Freelance expert data is broken into the following tabs: <b>Main, Application, Prices, Quotes, Freelance Jobs, POs, Payments, Account, Files, Info, Calendar</b> .
 Prices	The <b>Freelancers: Prices</b> window provides access to a general list of tariffs for freelance expert services. Here you can define a specific price in a specific currency for each service. This list also appears in the <b>Applicants: Prices</b> window.
 Quotes	The <b>Freelancers: Quotes</b> window displays a list of all quotes from freelance experts stored in the database.
 Freelance	The <b>Freelance Jobs</b> window displays a list of all jobs created for freelance experts. With the help of this window you can have a quick overview of all freelance job statuses, calculate freelance job totals and edit existing freelance

Jobs	jobs.
 POs	The <b>Freelancers: POs</b> window displays all currently issued purchase orders for freelance jobs. Here you can edit existing POs and use the Mass PO function.
 Payments	The <b>Freelancers: Payments</b> window lists the payments sent to all freelancers. Use this window to calculate payment totals, link payments with purchase orders and edit existing payments.
 Freelancer Accounts	The <b>Freelancer Accounts</b> window displays a simplified balance sheet broken into entries for each freelancer and based on purchase orders and payments to freelancers. Accounting staff can use this window to identify which accounts require attention. Can be viewed in Base Currency or Expert Currencies.

---

See also:

Ribbon

# Calendar Icons

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

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

## The Calendars tab

 <p>Calendar of Projects</p>	<p>Each of the four main calendars in Projetex displays its content (<b>Projects, Client Jobs, Corporate Jobs</b> or <b>Freelance Jobs</b>) in the form of colored blocks on a calendar, displaying the time constraints and current status of each project or job across the viewed time period.</p>
 <p>Calendar of Client Jobs</p>	
 <p>Calendar of Corporate Jobs</p>	
 <p>Calendar of Freelance Jobs</p>	

## The Options tab

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

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

---

See also:

Ribbon

The Calendar

# Reports Icons

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

## The Clients tab

Contains Static Reports showing the total funds invoiced by clients.



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

The **Top 5/10/25** reports each come in two versions: **This year** and **All time**. They show the indicated number of clients with the greatest total invoices over either the current year or across the entire database. They also show the overall percentage of the displayed clients' invoices in your gross revenue.

## The Jobs tab

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

 Jobs Chart	A bar diagram showing the monthly total volume of jobs created for a specific client
 Jobs Table	Similar to <b>Jobs Chart</b> , but presented as a table.
 Volume of Completed Jobs	A table showing the total volumes of completed jobs, with columns representing months and rows representing volume units.
 Sales Table	A table showing total sales for each month in the selected period.
 Sales chart	A bar diagram showing the total monthly sales over the selected period.
 Total Sales by Clients	Contains separate tables for each client, with the total volume and value of each "Group/service/unit" combination sold to each client.
 Sales History chart	A bar diagram showing the total monthly sales over the entire history of the database. Not affected by the Global Date Filter.
 Sales History Report by Clients	Shows the total volume and value of each unit type sold to each client over the entire history of the database. Not affected by the Global Date Filter.
 Sales by Service	A pie diagram showing the percentage of specific services in the total sales volume. Not affected by the Global Date Filter.
 Sales by units	A table showing the total volume and sum value of each kind of unit sold to all clients



Income and Expense  
Report Table and List

Reports showing monthly incomes and expenses, and totalling them to arrive at the overall balance. The two reports differ mainly in layout.

## The Invoices tab

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

 Invoice Register	Contains tables showing basic information on all invoices issued to each client (Date issued, Date due, number, total, paid amount, currency).
 Customer ledger	A table showing the total payments received from each client, further added up to totals in each currency and the grand total in the base currency.
 Sales chart	A bar diagram showing the total monthly sales (based on invoices) over the selected period.
 Sales History chart	A bar diagram showing the total monthly sales (based on invoices) over the entire history of the database. Not affected by the Global Date Filter.

## The Payments tab

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

 Sales History chart	A bar diagram showing the total monthly sales (based on payments) over the entire history of the database. Not affected by the Global Date Filter.
 Sales chart	A bar diagram showing the total monthly sales (based on payments) over the selected period.
 Sales List	A chronological list showing the linked invoice numbers, Client job names and numbers, and the amounts paid for each payment over the selected period.
 Account Receivable	Shows the totals of expected payments from each client. Is not affected by the Global Date filter.
 Customer ledger	A table showing the total payments received from each client, further added up to totals in each currency and the grand total in the base currency.
 Income Report #1	Shows a list of all payments issued over the selected period, with issue date and total in both client's currency and base currency.
 Income Report #2	A table of monthly payment totals from all clients, in the base currency.
 Cash Flow Table	Reports showing monthly payments from client and to experts, and totalling them to arrive at the overall balance. The two reports differ mainly in layout.

## The PMs tab

Contains reports on Project Manager productivity.

 Completed Client Jobs	The total volume of client jobs completed in the selected period by each PM, separated by year, month and unit.
 POs Register	A list of all POs given to each freelancer over the selected period, with totals for each currency and a grand total.
 Efficiency	A Productivity review for a specific PM over the selected period (projects completed, total payments received and given, total income for the company)

## The Corporate Team tab

Contains reports on Corporate Expert performance and productivity.

 Top 5	Shows the Top 5 experts by the total value produced and their percentage of total gross production by all Corporate Experts over the selected period
 Jobs Completed by Expert	Shows details of Jobs completed by a specific expert in a specific month and their total value for that month.
 Cost of Jobs	Shows the total cost of all Corporate jobs completed by each expert over the selected period.
 Breakdown of Services Provided	A pie diagram showing the percentage of specific services provided by corporate experts. Not affected by the Global Date Filter.
 Volume of Completed Jobs	The total volume of corporate jobs completed in the selected period by each Expert, separated by year, month and unit.
 Average Output by Expert	Shows the total Volume produced and time spent by each expert, separated by service provided.
 Personal Output	Shows the details of jobs (Code, Name, Service, Volume, Time Spent, Timeline and Productivity (Volume/Time)). You can select a specific Expert and/or volume unit to display, and determine whether to include only Completed jobs. Not affected by the Global Date Filter.
 Average Output by Service	Shows the total Volume, Time spent and Productivity for each service performed by the company, separated by Expert.

# The Freelancers tab

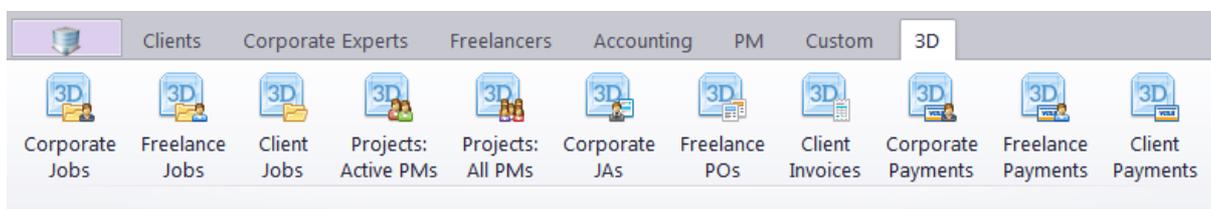
Contains reports on Freelancer performance and financial relationships.

 <b>Volume of Completed Jobs</b>	<p>The total volume of freelance jobs completed in the selected period, separated by year, month and unit, with grand totals for each unit type.</p>
 <b>Jobs Chart by Expert</b>	<p>A bar diagram showing the monthly total value of jobs completed by a specific expert over the selected period.</p>
 <b>Orders Distribution</b>	<p>Shows the payments terms, totals of jobs completed in the selected period, taxes withheld, the funds to transfer and the currency for each freelancer</p>
 <b>Average Output by Expert</b>	<p>Shows the total Volume produced and each freelance expert, separated by year, month, and unit type.</p>
 <b>POs Register</b>	<p>A list of all POs given to each freelancer over the selected period, with totals for each currency and a grand total.</p>
 <b>Payments Made</b>	<p>Shows a chronological list of all payments made to freelancers over the selected period, with totals for each currency and a grand total.</p>
 <b>Outstanding POs</b>	<p>Shows a list of unpaid or partially paid POs over the selected period, with totals for each currency and a grand total.</p>
 <b>Future Payments</b>	<p>Shows the total amount of expected freelancer payments in two lists, one separated by freelancers, the other separated by date.</p>

# The Custom tab

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

# The 3D tab



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

Form left to right, the reports create summaries on the following:

- Corporate, Freelance and Client Jobs
- Projects headed by PMs with currently active Projetex user accounts, or by all PMs regardless of account status
- Job Assignments, Purchase Orders and Invoices
- Payments given to corporate or freelance experts, or received from clients.

---

See also:

[Ribbon](#)

[Static Reports](#)

[Dynamic Reports](#)

# Knowledgebase Icons

The Knowledgebase Ribbon has only one tab, also named Knowledgebase. The icons there will open one of six knowledgebases included in Projetex 3D, and allow users to view and edit topics and articles for different parts of the corporate team.

 Team	The <b>Team</b> knowledgebase will be visible to your entire corporate team.
 Project Managers	The <b>Project Managers</b> knowledgebase will be visible to your PMs.
 Experts	The <b>Experts</b> knowledgebase will be visible to your corporate experts.
 Sales	The <b>Sales</b> knowledgebase will be visible to your sales staff.
 HR	The <b>HR</b> knowledgebase will be visible to your human resources managers.
 Accountant	The <b>Accountant</b> knowledgebase will be visible to your entire accounting staff.

---

See also:

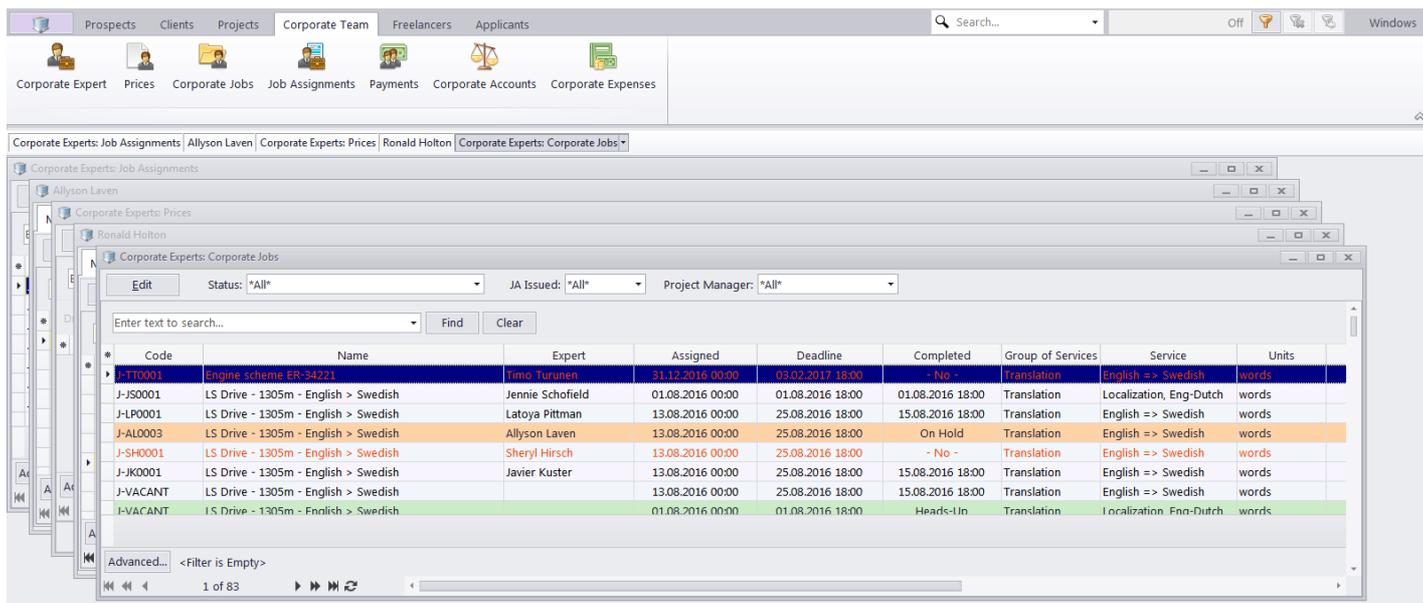
Ribbon

Knowledgebase Info Tab

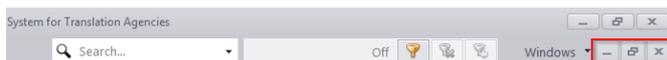
Knowledgebase Files Tab

# Multi-window Interface

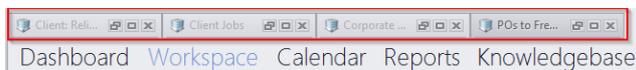
Every time you click an icon on the Ribbon to open a table, report, calendar, dashboard, or knowledgebase, it opens in a new window inside the program.



These windows can be manipulated just like the window of the program itself: moved, resized, maximized, minimized and closed. The control buttons for a maximized window are found directly under the control buttons for the program itself.

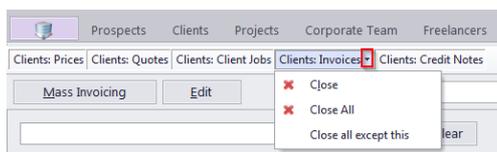


Minimized windows are lined up right above the Navigation Bar and can be moved around as well.



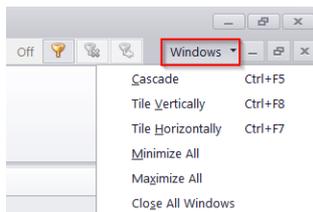
## Jump tabs

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



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

## Quick Window Modes



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

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

# Contextual Menu

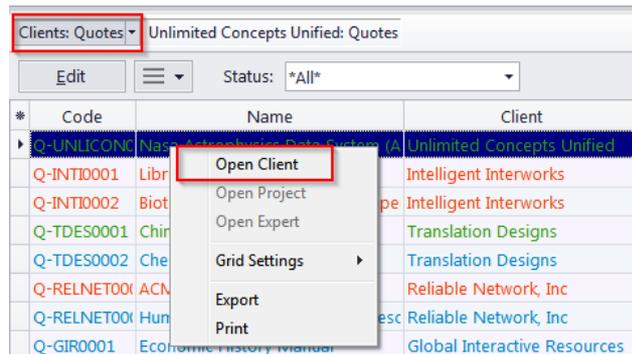
The contextual menu can be opened by right-clicking any table in the Projetex Workstation. The commands it contains depend on the table in question.

## Context jumps

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

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

Example:



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

The **Open Project** and **Open Expert** options work similarly.

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

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

## Grid Settings

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

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

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

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

Clients: Payments

Mass Payments Edit Status: \*All\*

Enter text to search... Find Clear

Drag a column header here to group by that column

* Client	Code	Date Received	Currency	Total Paid	Total Paid (EUR)	Linked	Linked (EUR)	Exchange Rate
Global Concepts	P-GCU0006	09.03.2015	JPY	54,00	0,41	54,00	0,41	0,01
The Illustrative	P-ILLDES0005	11.01.2015	EUR	1 500,00	1 500,00	1 500,00	1 500,00	1,00
Digital First C	P-DFC0004	07.01.2015	USD	600,00	462,00	600,00	462,00	0,77
Massive Archi	P-MASARC0005	07.04.2015	GBP	2 145,78	3 068,47	2 145,78	3 068,47	1,43
Wireless Ade		15	CAD	6 300,00	3 956,40	6 300,00	3 956,40	0,63
Wireless Ade		15	CAD	1 025,00	643,70	1 025,00	643,70	0,63
Future Unific		15	EUR	5 844,00	5 844,00	5 844,00	5 844,00	1,00
Future Unific resources		15	EUR	1 004,34	1 004,34	1 004,34	1 004,34	1,00
Cyber Computation Technologies, Inc		15	EUR	1 400,00	1 400,00	1 400,00	1 400,00	1,00
Intelligent Interworks	P-INTI0002	22.07.2015	EUR	1 203,00	1 203,00	1 203,00	1 203,00	1,00
Intelligent Interworks	P-INTI0003	22.07.2015	EUR	1 660,50	1 660,50	1 660,50	1 660,50	1,00
Digital Network Entertainment	P-DNE0005	26.01.2015	EUR	700,00	700,00	700,00	700,00	1,00
						106 942,94	93 796,71	

Advanced... <Filter is Empty>

74 of 91

## Flags

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

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

0018, Engine scheme ER-34221

Main Tree Client Jobs Corporate Jobs Freelance Jobs Freelance

New Project Delete Clone

* Deadline	Completed	Project Manager
14.06.2015 18:00	- No -	No Flag
05.09.2014 18:00	20.11.2014 18:00	Red
17.05.2015 18:00	- No -	Pink
14.05.2015 18:00	Heads-up	Magenta
19.03.2015 18:00	16.06.2015 11:55	Orange
03.06.2015 18:00	- No -	Yellow
20.04.2015 18:00	01.05.2015 18:00	Green
19.11.2014 18:00	- No -	Blue
18.08.2015 18:00	- No -	
08.06.2015 18:00	On hold	
20.02.2015 18:00	- No -	
06.09.2015 18:00	- No -	
10.05.2015 18:00	19.05.2015 18:35	

Grid Settings

See also:

Ribbon

Grouping records

Local Custom Filter

Find Panel

# Local Custom Filter

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

In Projetex 3D, the Local Custom Filter consists of three main parts: the Filter Builder, the Filter Box and the Column filters.

---

See also:

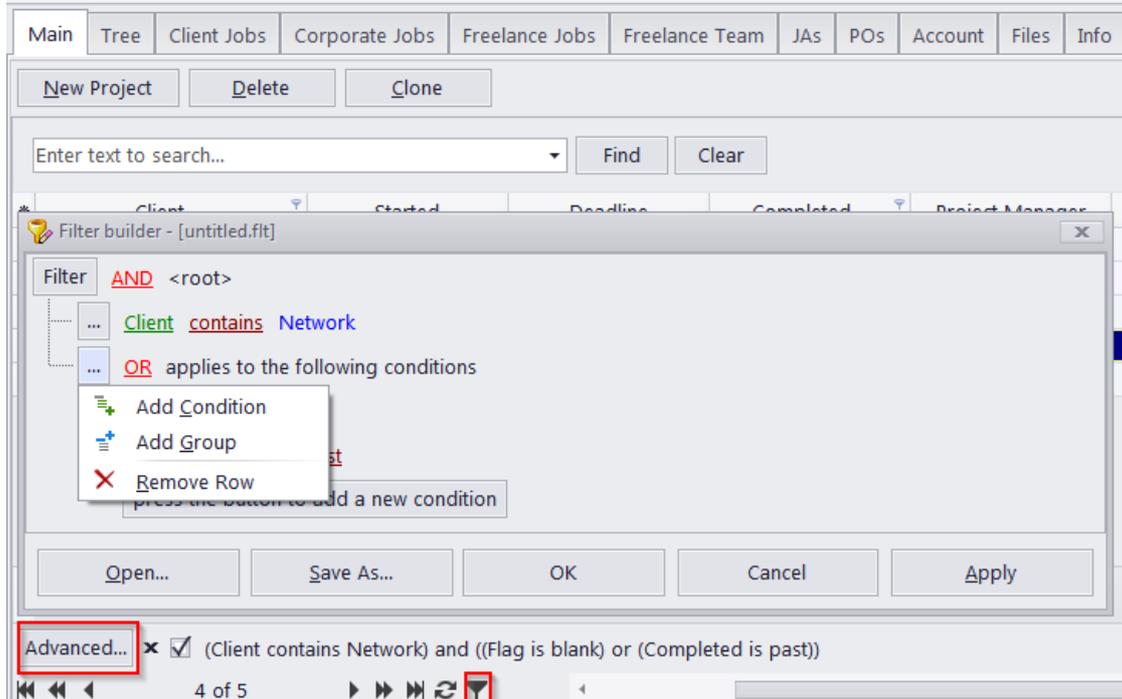
[Global Date Filter](#)

[Global Search](#)

[Find Panel](#)

# Filter Builder

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



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

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

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

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

## Standard Operators

<ul style="list-style-type: none"> <li>= equals</li> <li>≠ does not equal</li> <li>&lt; is less than</li> <li>≤ is less than or equal to</li> <li>&gt; is greater than</li> <li>≥ is greater than or equal to</li> </ul>	<p>Mathematical operators are used primarily on fields with numerical values. They can also be used on text strings. <b>Equals/Does not equal</b> can also be used on fields with a predetermined set of possible values.</p>
<ul style="list-style-type: none"> <li>abc contains</li> <li>acb does not contain</li> </ul>	<p><b>Contains/Does Not Contain</b> take strings of text as values and either display or exclude all entries where the indicated field contains that string.</p>
<ul style="list-style-type: none"> <li>[a]b begins with</li> <li>b[c] ends with</li> </ul>	<p><b>Begins With/Ends With</b> are similar to Contain, but are satisfied only if the target string is found at the beginning or end of a field's contents.</p>
<ul style="list-style-type: none"> <li>○ is blank</li> <li>● is not blank</li> </ul>	<p><b>Is Blank/Is Not Blank</b> take no values. They simply display or exclude entries, where the indicated field is blank.</p>
<ul style="list-style-type: none"> <li>📌 between</li> <li>📌 not between</li> </ul>	<p><b>Between/Not Between</b> take two values that define an interval and either display or exclude all entries where the indicated field's value is within the interval.</p>
<ul style="list-style-type: none"> <li>📌 in</li> <li>📌 not in</li> </ul>	<p><b>In/Not In</b> can take any number of values and display or exclude all entries where the indicated field's value matches any value in the set. New values can be added to the set with the '+' button to the left of the last entered value.</p>

# Condition Groups

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

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

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

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

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

---

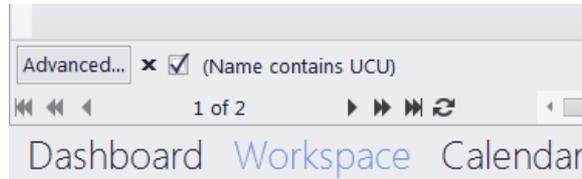
See also:

[Filter Box](#)

[Column Filters](#)

# Filter Box

The Filter Box, located just above the Page Navigation panel, displays the filter currently in effect. The check-box to the left of the filter expression will enable/disable the filter, while the X symbol will clear it. Clicking the description will bring up a menu of the last eleven previously used filter expressions. The **Advanced...** button opens the Filter Builder.



---

See also:

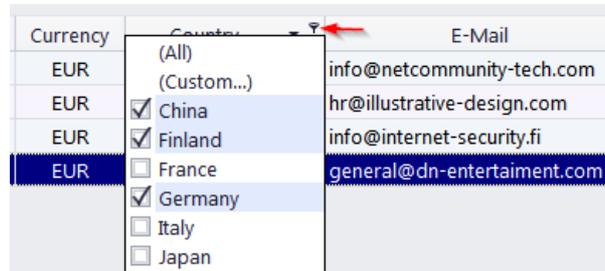
[Filter Builder](#)

[Column Filters](#)

# Column Filters

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

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

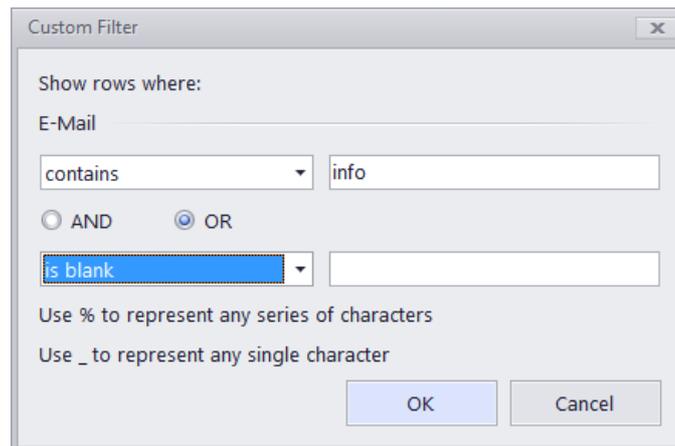


Checking one or more of the values in one column automatically creates a filter that displays only entries containing the checked values.

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

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

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



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

---

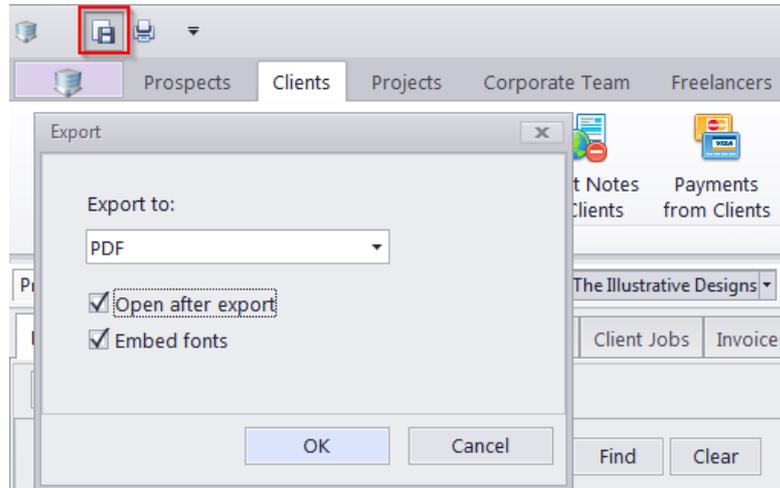
See also:

[Filter Builder](#)

[Filter Box](#)

# Local Export

Any table in the Projetex Workstation can be exported to a number of formats, by clicking the **Export** button in the top-left corner of the program window.



This will open the Export dialog box with several options.

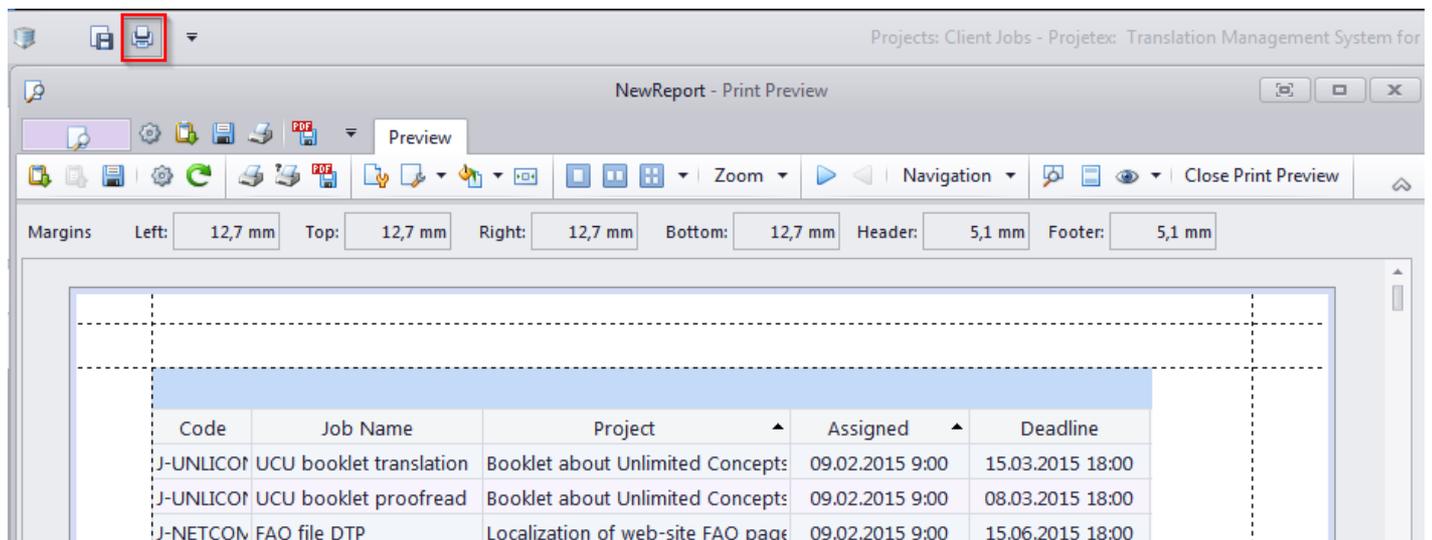
The **Export to** drop-down list can be used to select format of the output file.

The **Open after export** check-box automatically opens exported file.

The **Embed fonts** check-box, only visible when exporting to PDF, creates a .pdf file with all used fonts embedded (using this option you can be sure that you text will look the same on any computer, even if the fonts used are not installed there).

Alternatively, you can export the table directly to the printer: Click the **Print** button next to the Export button.

This will open the **Print Preview** window and allow you to adjust the appearance of the table (e.g. alter the margins, page parameters, etc.) before printing it.



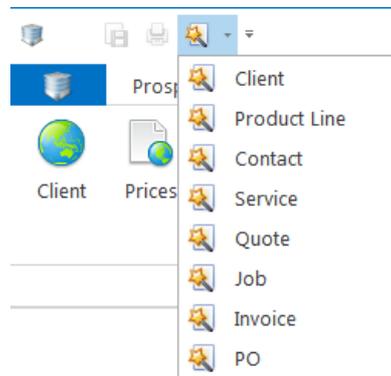
See also:

[Columns Customization](#)

# Wizards

Wizards are special modules that allow users to quickly create new records in the database.

Wizards can be accessed via the drop-down menu in the upper-left corner of the main window.



[Please follow the links below to see information on individual wizards](#)

See also:

[Client Wizard](#)

[Product Line Wizard](#)

[Contact Wizard](#)

[Service Wizard](#)

[Quote Wizard](#)

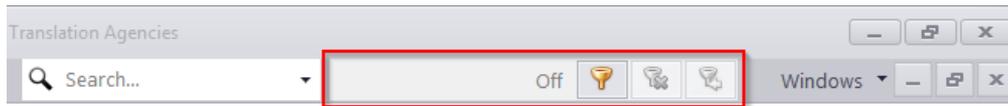
[Job Wizard](#)

[Invoice Wizard](#)

[PO Wizard](#)

# Global Date Filter

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

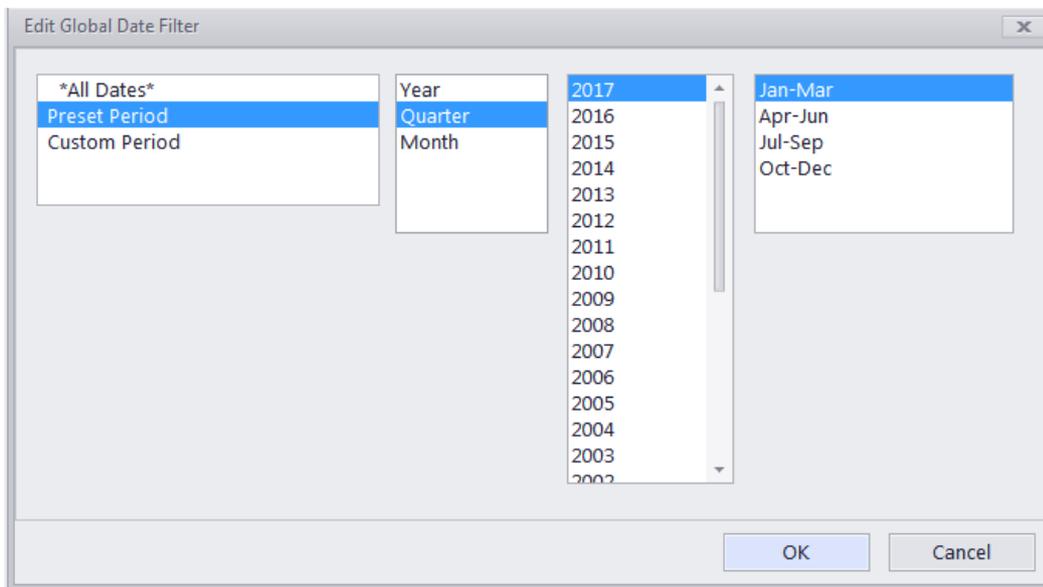


The three buttons on the filter display are, left to right: **Edit** (opens the filter's dialog window), **Off** (clears the current filter), and **Recent** (restores the most recent previously used filter).

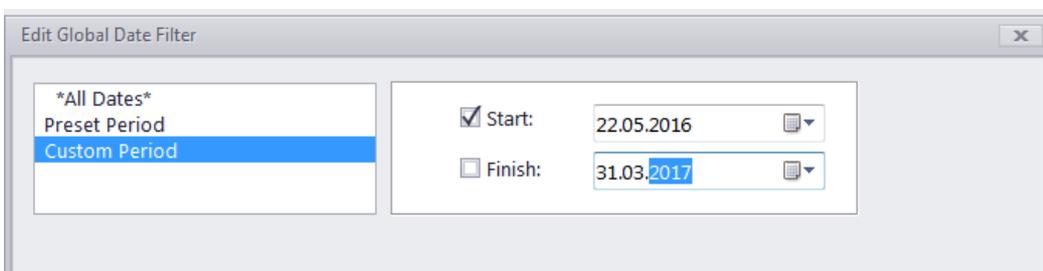
The global date filter's effect is not limited to the currently open window. Once applied, it works in all date-relevant records.

## Filter Options

1. \*All Dates\*/Off - the default setting, the filter is not active.
2. Preset period - select a specific year, quarter, or month to view.



3. Custom period - manually select the start and/or end of the interval



## Affected areas

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

In the **Prospects Workspace** tab:

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

- The **Quotes** window.
- The **Prospect Jobs** window.
- The **Invoices** window.
- The **Credit Notes** window.
- The **Payments** window.
- The **Refunds** window.

In the Clients Workspace tab:

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

In the Projects Workspace tab:

- The **Project** window tabs: **Main, Tree, Client Jobs, Corporate Jobs, Freelance Jobs, JAs, POs, and Accounts.**
- The **Client Jobs** window.
- The **Corporate Jobs** window.
- The **Freelance Jobs** window.
- The **Project Accounts** window.

In the Corporate Team Workspace tab:

- The **Corporate Expert** window tabs: **Corporate Jobs, JAs, Payments, Payments and Account.**
- The **Corporate Jobs** window.
- The **Job Assignments** window.
- The **Payments** window.
- The **Corporate Accounts** window.
- The **Corporate Expenses** window.

In the Applicants Workspace tab:

- The **Applicant** window tabs: **Application, Quotes, Applicant Jobs, POs, Payments**
- The **Quotes** window.
- The **Applicant Jobs** window.
- The **POs** window.
- The **Payments** window.

In the Freelancers Workspace tab:

- The **Freelancer** window tabs: **Application, Quotes, Freelance Jobs, POs, Payments, Account.**
- The **Quotes** window.
- The **Freelance Jobs** window.
- The **POs** window.
- The **Payments** window.
- The **Freelancer Accounts** window.

All **Static Reports**, which display data within a time interval, are also affected by the filter.

 **Note:** The global date filter affects the whole database. If you change it in one tab or window, it will be changed globally throughout your Projetex workstation.

 **Note:** The global date filter setting is saved when you close the program and will be used next time you run Projetex.

See also:

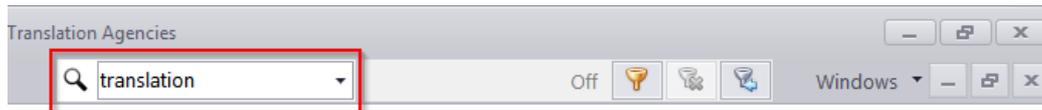
Local Custom Filter

Find Panel



# Global Search

Use the Global Search field near the Global Date Filter to search for a specific string of text across the entire database. Once the search is complete, a Search Results windows will open, Where you can review and refine them.



## Result tables

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

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

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

Objects [85]		People [10]	
* Context	Code	Name	Assigned
Client Invoice	I-MASARC00	[Included Job]: AG/PG Airplane - translation (blueprints)	2016-10-21
Client Invoice	I-NETCOM00	[Included Job]: FAQ file translation	2014-12-08
Client Invoice	I-UNLICON0	[Included Job]: UCU booklet translation	2014-08-09
Client Invoice	I-WIREAD00	[Included Job]: Content translation	2016-05-24
Corporate JA	JA-SH0002	[Included Job]: H-210 instruction translation (2)	2014-03-27
Freelancer PO	PO-CA0003	[Included Job]: Graphic translation	2015-11-11

## Refining search results

The left-hand side of the Search Results window consists of a dialog box used to alter the search parameters and refine the results. The Search Area window displays all the tables to be searched. You can check and uncheck any of them to define the exact scope of the search.

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

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

Search for:

Search area:

- Projects
- Prospects
  - Profiles
- Clients
  - Profiles
  - Contacts
  - Quotes
  - Jobs
  - Invoices
- Corporate Experts
  - Profiles
  - Jobs
  - JAs
- Freelancers
  - Profiles
  - Quotes
  - Jobs
  - POs
- Applicants

Case sensitive

Limit search results to:  entries per context

Search only:

---

See also:

[Global Date Filter](#)

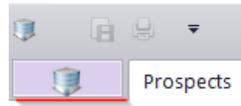
[Local Custom Filter](#)

[Find Panel](#)

# Backstage View

Most settings for Projetex are available via the Backstage view.

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



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

- The **Back** button in the upper left corner will take you back to the main screen of Projetex.
- The **Log In** option is available in offline mode and can be used to connect to the Projetex Server without the need to restart the Projetex Workstation.
- The **Log Out** option is available in online mode and can be used to terminate the connection to the Projetex Server (for example, when you need to log in under a different user account).
- The **Server** command is available in offline mode and opens the **Network Location** window where you can select a computer with the Projetex Server installed to connect to.
- The **Connected Users** command can be used to view other workstations currently connected to the Projetex Server.
- The **User settings** option gives access to settings specific to the particular Projetex user account, such as the general appearance and E-mail settings.
- The **Corporate settings** option gives access to settings that affect the server side and spread across all accounts, such as the list of services offered or template storage locations.
- The **Administrator** option gives access to settings that affect the Projetex system itself, such as user access rights or documentation codes.
- The **Help** option allows you to **check for updates** and download new builds of Projetex, enter your license code when you **Register** or **Upgrade** your installation of Projetex, or view current the version and build information of your Projetex Workstation.
- The **Exit** command ends your work session with Projetex Workstation.



See also:

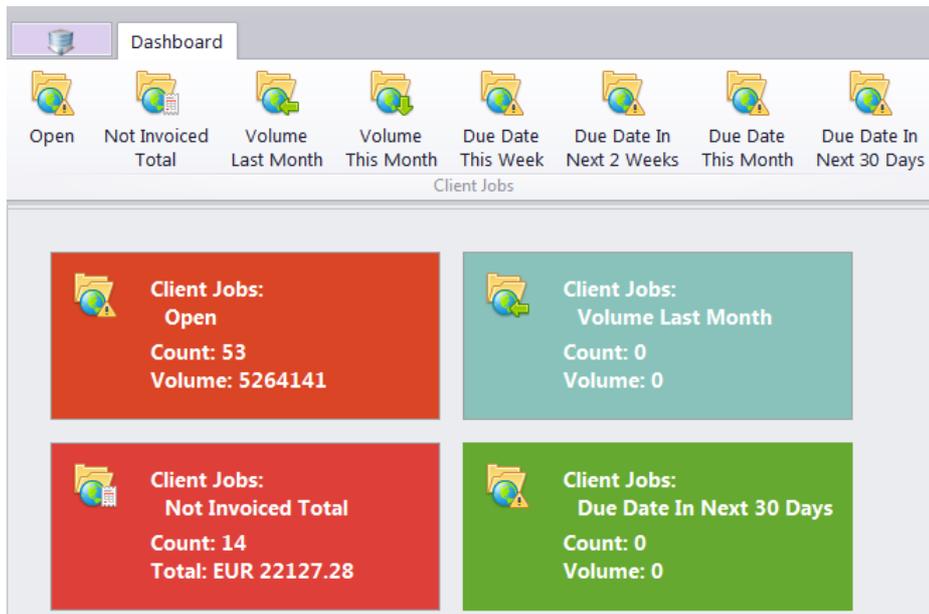
User settings

Corporate settings

Administrator settings

# Dashboard

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



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

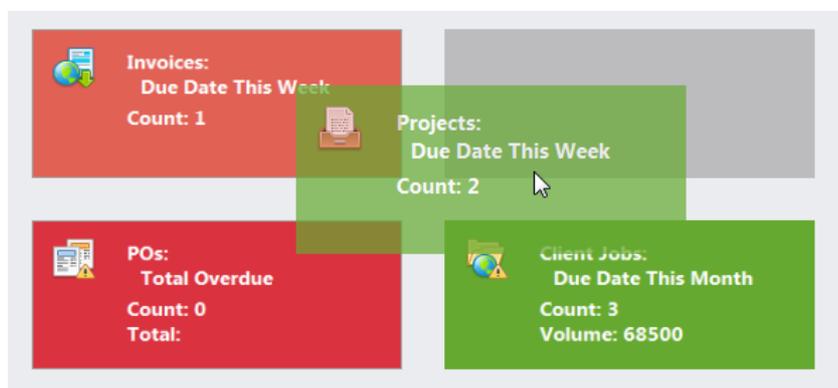
Left-clicking a widget will transport you to the corresponding table and automatically apply the required filters.

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



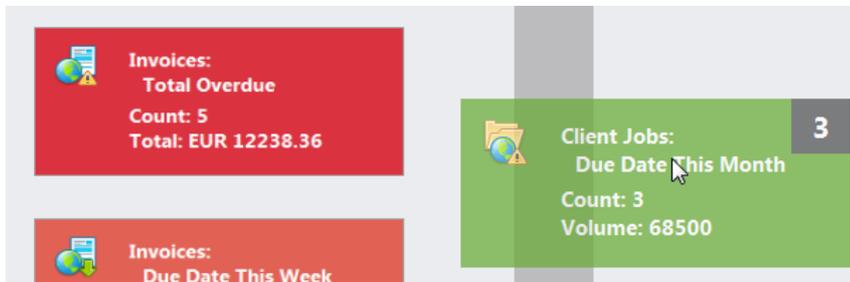
## Moving and Grouping widgets

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

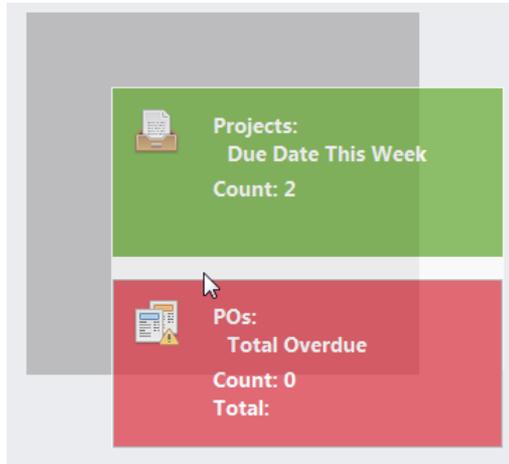


To move several widgets at once, right-click each, then click and drag one of the selected widgets.

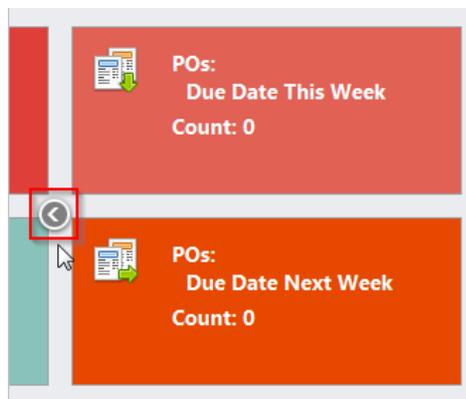
To create a new group of widgets, drag a widget towards the right side of the screen or in between existing groups. A thin vertical "shadow" indicates that the widget will create a new group when dropped.



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

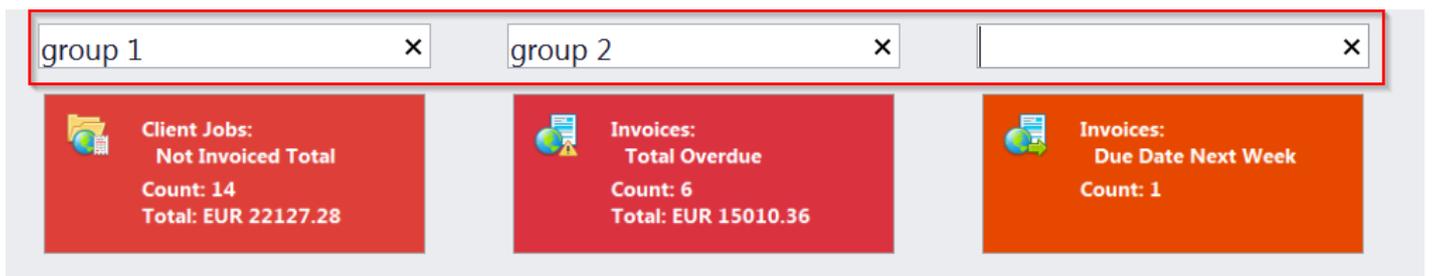


If the number of groups exceeds the width of the screen, you can scroll the screen by clicking the arrows that appear when you move your mouse to the left or right edge of the window, or by clicking and dragging the gutter between groups.

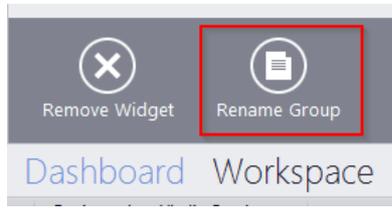


## Naming groups

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



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



---

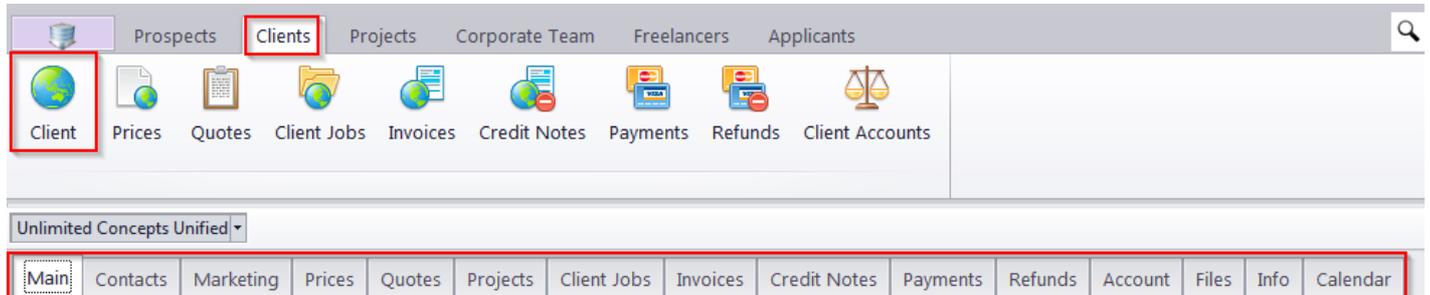
See also:  
Dashboard Icons

# Client Window

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

## Client Window tabs

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



- The **Main** tab — contains the profiles of your clients and basic information on them.
- The **Contacts** tab — lists the contacts of the selected client. New client's contacts can be added here.
- The **Marketing** tab — contains the marketing information added by your sales representatives or marketing staff.
- The **Prices** tab — holds the individual price list of the selected client. Here this client's prices can be created and edited.
- The **Quotes** tab — is used for issuing and managing quotes offered to the selected client.
- The **Projects** and **Client Jobs** tabs — these tabs contain the projects and client jobs of the selected client.
- The **Invoices** and **Payments** tabs — these tabs hold all invoices issued to and payments made by the selected client. Here invoices are created, and linked with payments.
- The **Credit Notes** and **Refunds** tabs — these tabs contain all credit notes received from and refunds issued to the selected client. Credit notes and refunds can also be linked together here.
- The **Account** tab — provides a basic overview of the financial account of the selected client.
- The **Files** tab — this tab is used for accessing the selected client's files and folders.
- The **Info** tab — is used for adding various client-related notes.
- The **Calendar** tab — graphically displays the timelines and statuses of the selected client's projects.

---

See also:

Workspace Icons

# Client Window Main Tab

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

## The Client list

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

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

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

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

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

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

The screenshot shows the 'Unlimited Concepts Unified' software interface. The 'Main' tab is active, displaying a table of clients. A context menu is open over the 'UNLICON' client entry, showing options 'Clone' and 'Move to Prospects'. The right-hand pane shows the 'Profile' tab for 'UNLICON', with details such as Name, Postal Address, Project Managers, Contact Info, Web, Payment Terms, VAT Number, Client Folder, Currency, Invoicing Policy, and FTP connections.

Name	Currency	Country	
Cyber Computation Technologies, Inc	EUR	United Kingdom	mail@cyber-
Definition Designs	USD	Korea, South	translations
Digital First Concierge	USD	Russia	info@digital
Digital Network Entertainment	EUR	China	general@dn
Enigma Server Technologies, Inc	EUR	France	mail@enigm
Future Unified Resources	EUR	Italy	another@un
Global Concepts Universal	JPY	Japan	japan@glob
Global Interactive Resources	EUR	Sweden	jobs@iresou
Intelligent Interworks	EUR	France	support@int
Internet Security Technologies	EUR	Finland	info@interne
Internet Unified Corp.	EUR	United States	info@interne
Key Outsourcing Studios	EUR	Sweden	trans@key-c
Massive Archway, Inc	GBP	United Kingdom	info@massiv
Network Community Technologies	EUR	Germany	info@netcor
Reliable Network, Inc	EUR	Norway	info@reliabl
The Illustrative Designs	EUR	Finland	hr@illustrati
The Lighting Graphics	USD	United States	mail@lightr
Total Paradigm Unlimited, Inc	EUR	United States	info@total-p

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

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

**Note:** Due to user access restrictions, some filter operations (like the local custom filter and the global date filter) or page settings, you may not be able to see all the clients in the database.

## The client's profile

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

- **Client code** — click on this button to enter or change the client's code (15 characters maximum) and, optionally, add the client's logo. This is the same code which had been assigned, manually or automatically, when creating a new client record. This code is also used for naming client folders as well as in codes for invoices, quotes and other documentation.
- **Name** — click this button to edit this client's name. This name can be up to 150 characters long.
- **Project Managers** — this field lists the client's product lines and the product line project managers assigned to them. Click the **Project Managers** button to assign or remove product line project managers for the client's product lines, or to create, edit and delete product lines. All new clients are created with a default Main product line and the user who created the client is automatically assigned as the product line project manager for it. **Note:** Only users with advanced access rights can assign project managers.
- **Postal Address** — click this button to add or change the postal address of the client. See the Postal address of client topic for more details.
- **Contact Info** — allows you to add or change the contact information of the client. See the General contact information topic for more details.
- **Web** — opens the **Edit Web Links** dialog box, providing fields to enter your client's web site address (URL), as well as their LinkedIn, Facebook, and Twitter accounts. Click the address or the social media icons to open the corresponding links in your Internet browser.
- **Payment Terms** — allows you to specify payment terms for each client, and their minimum fees. According to this information Projetex will determine if your invoices to the client are outstanding, overdue or will be due soon. See the Payment terms of client topic for more details.
- **VAT Number** — enter the client's legal tax number to have it automatically displayed and printed on invoices.
- **Client Folder** — this part of the client's profile can be used to quickly access the client's files. The location of the client

folder will depend on the **location of the centralized Business folder**, assigned with the help of the Projetex Server Administrator. Click the folder button on the right side of the field to open the client's folder (and create it if it does not exist yet) in the Projetex 3D Explorer window.

- **Client Currency** — this currency will be used to issue quotes and invoices to this client, and to record payments from this client. All the financial records for this client are kept in both your base currency and the client currency, converted according to exchange rates which you set.
- **Next Codes** — click this button to edit the automatic counters for client-specific codes of quotes, client jobs, invoices and payments. Projetex will use these codes for the next quote, client job, invoice and payment you create. You can not set the code value any lower than the highest value on existing documentation. See the Next client codes topic for more details.
- **Locale Format** — different clients usually have different requirements for displaying dates, numbers and monetary values. The locale format settings are used to configure this format individually for each client. These formats will then be applied to any printable documentation. See the Locale format of client topic for more details.
- **Invoicing Policy** — by adjusting the invoicing policy you determine conditions upon which Projetex will prompt you to invoice client jobs. See the Invoicing policy of client topic for more details.
- **FTP connections** — here you can set parameters for access to the client's FTP folders. Shortcuts to these folders will be automatically added to the **Files** tab of this client's window. See the Client FTP connections topic for more details.
- **General Information** — any additional information which did not fit into any of the other sections can be entered here.

## The clients' custom data

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

 **Note:** Only users with access to the Projetex Server Administrator can add or remove custom fields.

## Audit and Alerts

The **Audit** tab keeps track of when and by whom a client profile was created or modified.

The **Alerts** tab keeps track of messages received from the **Projetex 3D Automation Engine** that concern this particular client.

---

See also:

[Adding/Editing Client/Prospect Profile](#)

# Postal address of client

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

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

**City** — maximum 40 characters long.

**State** — maximum 40 characters long.

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

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

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

The screenshot displays two overlapping windows from a software application. The background window is the 'Postal Address' window, which has a search bar at the top and a list of client names on the left. The main area contains fields for 'Street Address' (Carrer De Ribes, 35), 'City' (Barcelona), 'State' (empty), 'ZIP Code' (empty), and 'Country' (Spain). Below these fields, it shows 'Local Time: 08.06.2017 13:33' and a 'Time Zone' dropdown set to '(UTC+01:00) Brussels, Copenhagen, Madrid, Paris'. The foreground window is the 'Time Zone Settings' window, which prompts the user to 'Set the Time Zone:'. It features a dropdown menu currently showing '(UTC+01:00) Brussels, Copenhagen, Madrid, Paris' and displays the 'Current date and time: 08.06.2017 13:34'. Both windows have 'OK' and 'Cancel' buttons at the bottom.

See also:

Main Tab of Client Window

General contact information

# General contact information

Clients in Projetex have two types of contact information: general contact information (usually of a company rather than a person) and the contact information of the client's contact persons (Contacts Tab of Client Window). General contact information of a client can contain the following data:

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

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

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

The general contact information of a client can also be added to templates with the help of the Client Template Variables.

The screenshot shows a software interface with a 'Profile' tab selected. A 'Contact Info:' label is highlighted with a red box. Below it, the contact information for 'Internet Unified Corp.' is displayed: E-mail: info@internet-unified.com and Fax: +1 3345 553335. An 'Edit Contact Info' dialog box is open, showing the same contact information in a form. The dialog box has a title bar with 'Edit Contact Info' and a close button. The form contains the following fields: E-mail (with 'info@internet-unified.com' entered and a 'Send' button), E-mail 2 (empty), Phone (empty), Phone 2 (empty), Phone 3 (empty), Phone 4 (empty), Fax (with '+1 3345 553335' entered), and Notes (empty text area). At the bottom of the dialog box are 'OK' and 'Cancel' buttons.

See also:

Main Tab of Client Window

Postal address of client

# Payment terms of client

According to a client's payment terms, Projetex will keep track of unpaid invoices and the update status of outstanding invoices: overdue, due today, due tomorrow, and so on.

With the help of the **Edit Payment Terms** dialog you can configure the payment conditions of a selected client, including:

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

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

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

**Additional Notes** — a plain text notewith no maximum length.

The screenshot shows the 'Edit Payment Terms' dialog box. At the top, there are tabs: 'Profile', 'Custom Fields', 'Audit', and 'Alerts'. The 'Payment Terms:' tab is highlighted with a red box. Below the tabs, the text 'On day 1 of the month following next (from Invoice date)' is displayed. The dialog is titled 'Edit Payment Terms' and shows the client name 'Vitaliy Gutyk' and the company 'Internet Unified Corp.'. There is a 'Minimum Fee' field set to 0, with a note '(0 - No Minimum Fee)'. Below this, there are five radio button options for payment terms: 'Within 30 days', 'On day 10 of the same month', 'On day 10 of the next month', 'On day 1 of the month following next' (which is selected), and 'Unknown/Other'. At the bottom, there is an 'Additional Notes' text area and 'OK' and 'Cancel' buttons.

See also:

Main Tab of Client Window

Invoicing policy of client

# Locale format of client

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

To have invoices to clients printed according to their own *Regional and Language options* (normally defined in the *Windows Control Panel*), Projetex can use a separate locale format for each of your clients.

The screenshot shows the 'Locale of Unlimited Concepts Unified' dialog box. The 'Locale Format' tab is selected and highlighted with a red box. The 'Generation of RTF files' dropdown is set to 'Custom Values'. The 'Negative Currency Format' is '-1,1', 'Decimal Symbol' is ',', 'No. of digits after Decimal' is '2', 'Digit Grouping Symbol' is empty, 'Date Separator' is '.', 'Short Date Format' is 'dd/MM/yyyy', and 'Long Date Format' is 'd MMMM yyyy' p.'. The 'Samples' section shows 'Positive Number: 123 456 789,00', 'Negative Number: -123 456 789,00', 'Short Date: 08.06.2017', and 'Long Date: 8 червня 2017 р.'. The 'OK' and 'Cancel' buttons are at the bottom right.

The following locale settings can be configured:

- **Negative Currency Format** — these settings determine how negative amounts of money are displayed. For example, in some countries a negative amount is indicated with a "minus" put before number: -100.00. In other countries a negative amount must be written in brackets: (100.00).
- **Decimal Symbol** — this is the character which separates decimals from the rest of the number. You can type the required character directly into the drop-down list. Any character you type will be added to the list for later use.
- **No. of digits after Decimal** — Projetex will round up all numbers in documents to a number of decimals specified here. Set this parameter to 0 if the currency of a client does not have decimal units. Most commonly the number of digits after a decimal is 2.
- **Digit Grouping Symbol** — this is the symbol which will be inserted between each three digits in a number, for example in the number 1 000 000 the digit grouping symbol is a whitespace.
- **Date Separator** — enter the character to separate the day, month and year in a date when it is displayed in the short format. For example in the date 3,31,2008 the date separator character is a comma. Settings in the **Date Separator** field will be automatically applied to the **Short Date Format** field.
- **Short Date Format** — this format is for the short date display (like 3,31,2008). Enter a required date format into this field or select one of the available formats using the drop-down list. Use *d* to indicate the day, *m* – for the month, and *y* – for the year. The date separator characters can be entered manually in this field as well. Otherwise the settings from **Date Separator** field will be applied.
- **Long Date Format** — these settings configure the long format date (like Monday, March 31, 2008). Use four *d* characters to use the day name, four *m* characters – for the month name and four *y* for the year.

 **Note:** To use an abbreviated day or month name ("*Mon*" instead of "*Monday*" or "*Mar*" instead of "*March*") enter 3 *d* or 3 *m* characters instead of four.

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

To configure locale settings for a certain client, click the **Locale Format** button in this *client's profile* and choose **Custom Values** from the **Generation of RTF files** drop-down list.

---

See also:

Main Tab of Client Window

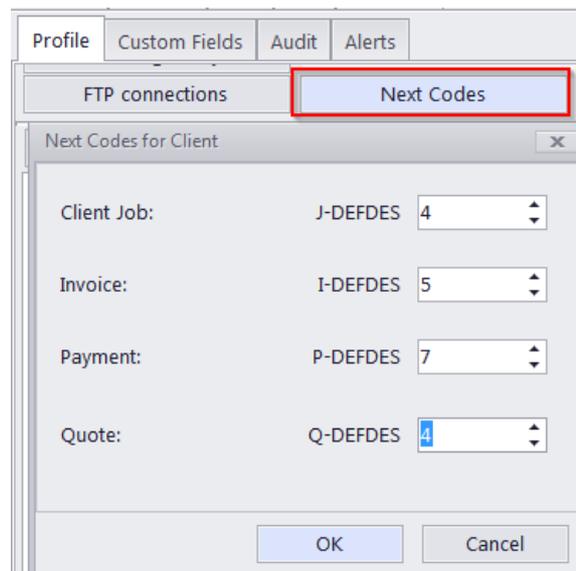
# Next client codes

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

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

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

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



---

See also:

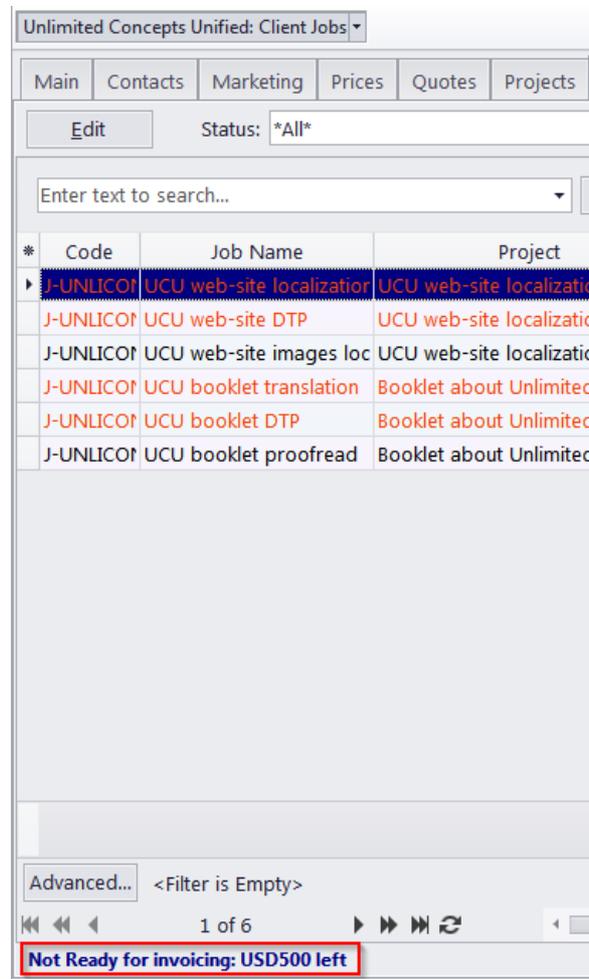
Main Tab of Client Window

Global code settings

# Invoicing policy of client

The invoicing policy settings determine when Projetex alerts the user to invoice a client job. According to these settings, Projetex will assign one of the following statuses to uninvoiced client jobs: **Not ready for invoicing** or **Ready for invoicing**, followed by a comment determined by the current *invoicing policy settings*, for example, "**Total reached**".

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



The screenshot shows a software interface for managing client jobs. At the top, there's a title bar 'Unlimited Concepts Unified: Client Jobs' and a set of tabs: 'Main', 'Contacts', 'Marketing', 'Prices', 'Quotes', and 'Projects'. Below the tabs is an 'Edit' button and a 'Status: \*All\*' dropdown. A search bar with the placeholder 'Enter text to search...' is present. The main area contains a table with columns: Code, Job Name, and Project. The table lists several jobs, with the first one selected. At the bottom, there's an 'Advanced...' button, a filter status '<Filter is Empty>', and a navigation bar showing '1 of 6' items. A red box highlights the status bar text: 'Not Ready for invoicing: USD500 left'.

* Code	Job Name	Project
J-UNLICO!	UCU web-site localization	UCU web-site localizati
J-UNLICO!	UCU web-site DTP	UCU web-site localizati
J-UNLICO!	UCU web-site images loc	UCU web-site localizati
J-UNLICO!	UCU booklet translation	Booklet about Unlimitec
J-UNLICO!	UCU booklet DTP	Booklet about Unlimitec
J-UNLICO!	UCU booklet proofread	Booklet about Unlimitec

By default, the invoicing policy for all the clients states that client jobs must be invoiced immediately after completion.

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

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

To configure your invoicing policy for a certain client, click the **Invoicing Policy** button in this *client's profile*.

Profile Custom Fields Audit Alerts

Invoicing Policy: **After total of EUR600: 5 days maximum**

Edit Invoicing Policy

Between: **Vitaliy Gutyk**  
and: **Digital Network Entertainment**

Invoice Client Jobs

Immediately after completing job

Only after total of invoiced jobs reaches:

600,00

Wait accrual no longer than

5 days

Client Currency: EUR

OK Cancel

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

---

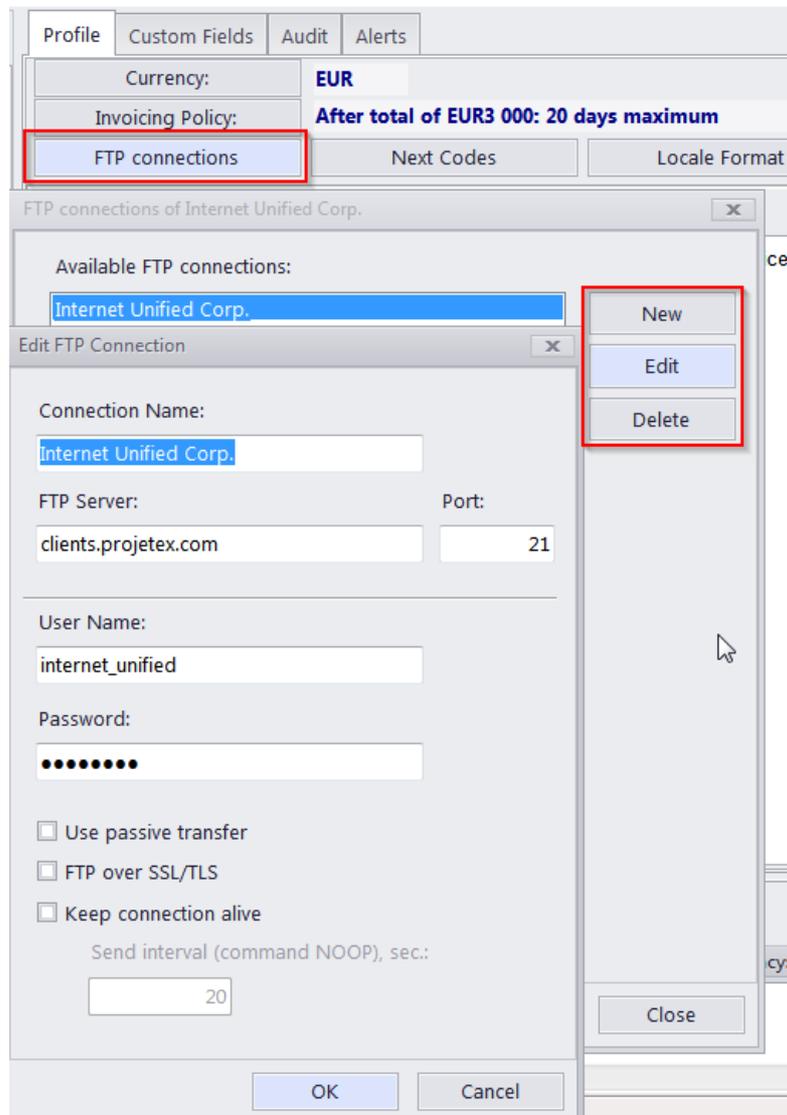
See also:

Main Tab of Client Window

Payment terms of client

# Client FTP connections

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



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

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

**FTP Server** — the address of the FTP server (for example ftp.server.com). Can be no longer than 50 characters. You can also specify which **Port** to use.

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

**Password** — this password will be used when Projetex attempts to connect to the FTP folder. Can be no longer than 50 characters.

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

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

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

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

See also:

[Main Tab of Client Window](#)

[Files Tab of Client Window](#)

# Client Window Contacts Tab

A *Client's Contacts* are persons on the client side which your managers work with regarding this client's projects.

*Contacts* can be associated with projects (by putting one of the client's contacts into the **Client PM** field).

*Contacts* of the client can also be added to the **Attention** field in invoices.

The **New** button opens the **New Contact** window, where the details of a new contact person can be added.

The **Edit** button opens the **Edit Contact** window, where the details of the currently selected contact person can be edited.

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

The **Clone** button creates a complete copy of the currently selected contact and adds it to the list of this client's contacts. The cloned contact will have the (*Cloned contact*) text in front of the contact name.

Unlimited Concepts Unified: Contacts ▾							
Main	Contacts	Marketing	Prices	Quotes	Projects	Client Jobs	
New		Edit		Delete		Clone	
*	Position	Salutation	Name		E-mail		
	Marketing	Mr.	Bernardo Fernandez		bernardo...		
▶	Accountant	Mrs.	Graciela Flores		graciela@u...		
	PR	Mrs.	Benita Ortega		benita@unl...		

---

See also:

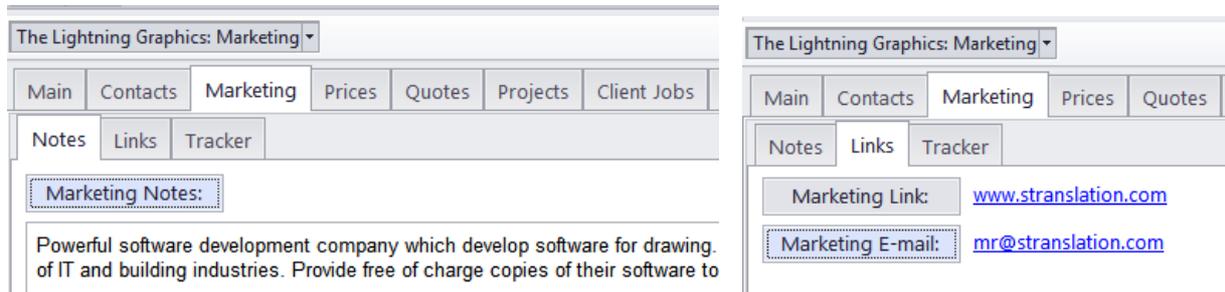
Client Window

General contact information

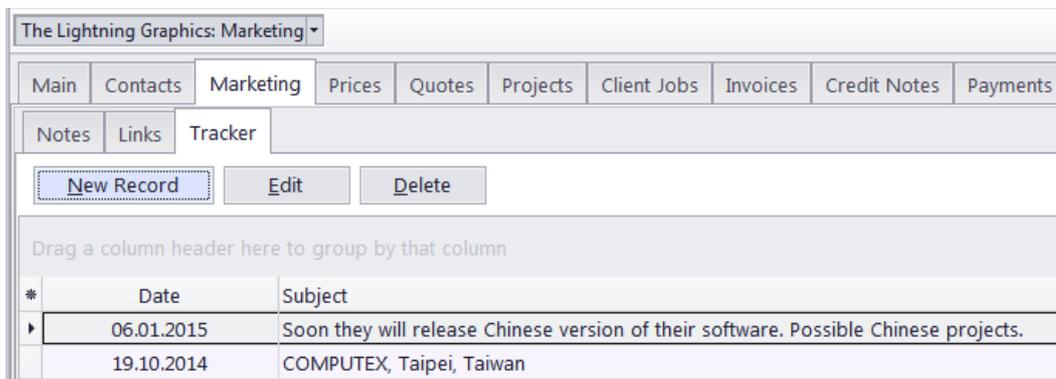
Adding/Editing Contacts of Client/Prospect

# Client Window Marketing Tab

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



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



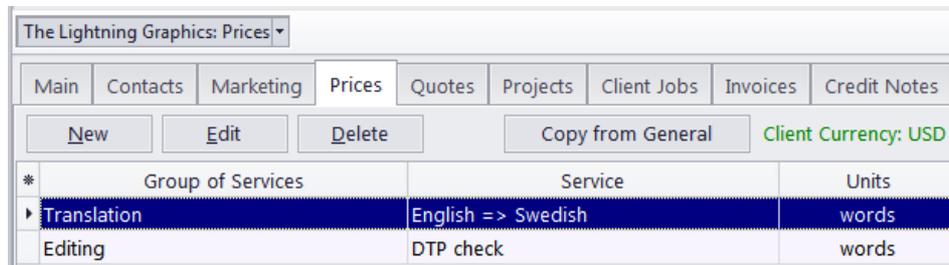
---

See also:  
Client Window

# Client Window Prices Tab

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

Only one price per group of services, service and unit combination can exist in an individual price-list.

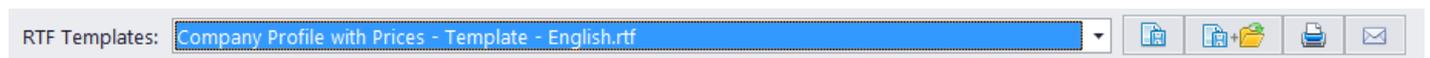


The **New** button opens the **New Price** window, where the details of a new price can be added.

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

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

The **Copy from General** button opens the **Copy from General Prices to Clients** window which can be used to copy prices from the *general* price-list for clients to the *client-specific* price-list.



You can print a client's price list or save it in a text file by selecting the template and clicking the **Save**, **Save & Open** or **Print** button at the bottom of the window.

You can also click the **Send Mail** button to open the Projetex Mail Sender and send it to the Client's E-mail address as an attachment.

---

See also:

Client Window

Client Prices window

Managing price lists

# Client Window Quotes Tab

The **Quotes** tab of the **Client** window is designed to create and manage quotes for each client in the database. A quote can contain a number of draft client jobs, each job representing a service and its price being quoted. Like most workflow documents in Projetex, quotes can be saved to a printable file, printed, or sent via E-mail.

## Client Quote Controls

Quote management buttons are located on the left side of the **Quotes** tab of the **Client** window.

The **New Quote** button opens the **New Client Quote** window, where the details of a new client quote can be added.

The **Edit** button opens the **Edit Client Quote** window, where the details of the currently selected quote can be edited.

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

The **More...** button opens into a drop-down menu with the **Clone** and **Create Project Based on Quote** options.

**Clone** will create a full copy of the selected quote, which can be used if you want to create a similar quote.

**Create Project Based on Quote** will create a new project for the current client, based on data from the currently selected quote. If a quote folder contains any files, Projetex will query whether these files must be copied to the project folder of the newly-created project.

The **Status** filter drop-down list can be used to display only quotes with a certain status.

* Code	Name	Client	Assi
Q-LIGRA0001	Cras eget mi.	The Lightning Graphics	23.07.20
Q-LIGRA0002	UNESCO Research Results	The Lightning Graphics	21.12.20

* Name	Group of Service	Service
Research Results	Translation	English => Dutch

## Draft Client Job Buttons

The buttons for management of draft client jobs are located on the right side of the **Quotes** tab.

The **New** button opens the **New Draft Client Job** window, where the details of a new draft client job can be added.

The **Edit** button opens the **Edit Draft Client Job** window, where the details of the currently selected draft client job can be edited.

The **Delete** button deletes the currently selected draft client job.

## Client Quote Status

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

- **Blue** for unknown quote status
- **Green** for accepted quote status
- **Red** for rejected quote status
- **Purple** for received or corrected quote status

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

See also:

Client Window

Client Quotes window

Creating Quotes

# Client Window Projects Tab

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

The Lightning Graphics: Projects ▾														
Main	Contacts	Marketing	Prices	Quotes	Projects	Client Jobs	Invoices	Credit Notes	Payments	Refunds	Account	Files	Info	Calendar
New		Edit		Delete		Status: *All*			Project Manager: *All*					
* Project Code	Project Name			Assigned	Deadline	Completed	Corporate PM		Client PM					
0019	Marketing booklet			22.05.2014 00:00	05.09.2014 18:00	20.11.2014 18:00	William McSun		Lane Ellis Annan					
0032	Thermal Displacement Guide			24.08.2014 00:00	23.05.2015 18:00	- No -	Bartholomeo Rodrigues		Lane Ellis Annan					

## Filters

The **Status** filter drop-down list can be set to display only projects with a particular status.

The **Project Manager** filter drop-down list can be set to display only projects led by certain project manager.

## Project Statuses

Projects in the list are shown in different colors. These are determined by the current status of each project:

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

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

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

**Black** — the project is *completed*.

---

See also:

[Client Window](#)

[Project Window](#)

[Creating a project](#)

# Client Window Client Jobs Tab

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

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

With the help of the **Invoiced** filter drop-down list you can view only those client jobs which have or have not been invoiced.

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

The Lightning Graphics: Client Jobs ▾												
Main	Contacts	Marketing	Prices	Quotes	Projects	Client Jobs	Invoices	Credit Notes	Payments	Refunds	Account	Files
Edit		Status: *All*					Invoiced: *All*		Client Currency: USD			
*	Code	Job Name	Project	Assigned	Deadline	Completed	Group of					
	J-LIGRA001	Graphic translation	Marketing booklet	22.08.2014 00:00	18.11.2014 18:00	18.11.2014 18:00	Translation					
	J-LIGRA001	Content translation	Marketing booklet	22.07.2014 00:00	27.07.2014 18:00	27.07.2014 18:00	Translation					

## Client Job Statuses

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

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

**Blue** — the job is *not completed* and *due today*.

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

**Black** — the job is *completed*.

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

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

**Orange background** — *On Hold* status

**Green background** — *Heads-Up* status

**Grey background** — *Canceled* status

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

 **Note:** To configure the status colors, in the **Backstage** view click **Current user**, then click **Colors: Status**.

---

See also:

Client Window

Client Jobs window

Creating client jobs

# Client Window Invoices Tab

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

The **Invoices** tab of the **Client** window is used to issue and keep track of invoices to the currently selected client. All invoices issued to this client are displayed in the table.

The **New** button opens the **New Invoice** window, where a new invoice can be created.

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

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

The **Void** button voids the currently selected invoice without deleting it.

The Lightning Graphics: Invoices														
Main	Contacts	Marketing	Prices	Quotes	Projects	Client Jobs	Invoices	Credit Notes	Payments	Refunds	Account	Files	Info	Calendar
New		Edit		Delete		Void		Status: *All*	Approved: *All*		Client Currency: USD			
*	Client	Code	Global Code	Sent	Currency	Exchange Ra	Invoice Total	Paid	Date Due	Status				
	The Lightning Graphics	I-LIGRA0001	ACME-10012/201	15.07.2014	USD	0,76	4 445,76	4 445,76	25.07.2014	Settled: 4 days				
	The Lightning Graphics	I-LIGRA0002	ACME-10042/201	18.02.2014	USD	0,77	1 680,00	1 680,00	27.03.2014	Settled: 21 days				

## Filters

You can choose to view only invoices with a specific status. To display only the invoices with a particular status, click the **Status** filter drop-down list.

You can also set Projetex to display only those invoices which have or have not been approved by the project manager by applying the **Approved** filter.

## Invoice Statuses

Invoices in the list are shown in different colors. These are determined by the current status of each invoice:

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

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

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

**Black** — the invoice has been *settled* (paid) or voided.

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

See also:

[Client Window](#)

[Client Invoices Window](#)

[Creating Invoices](#)

# Client Window Credit Notes Tab

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

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

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

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

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

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

* Code	Client	Sent	Value	Total	Status
▶ CN-LIGRA0001	The Lightning Graphics	08.06.2017	300,00	360,00	Fully paid

## Credit Note Statuses

Credit notes can have one of four statuses:

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

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

---

See also:

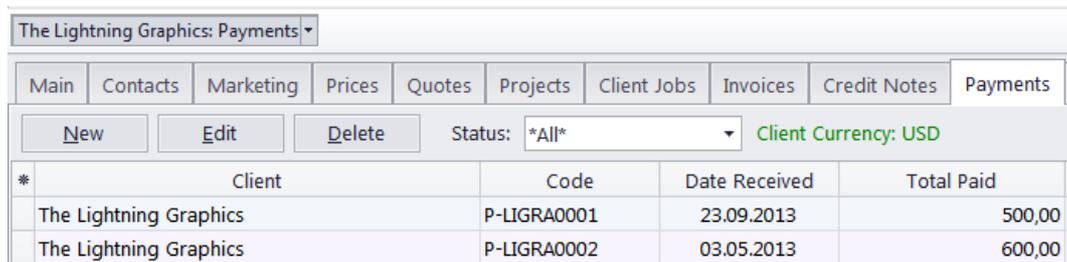
[Client Window](#)

[Client Credit Notes window](#)

[Creating Credit Notes](#)

# Client Window Payments Tab

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



The screenshot shows the 'The Lightning Graphics: Payments' window. It features a navigation bar with tabs for Main, Contacts, Marketing, Prices, Quotes, Projects, Client Jobs, Invoices, Credit Notes, and Payments. Below the tabs are buttons for New, Edit, and Delete, a Status filter set to '\*All\*', and a Client Currency of USD. The main area contains a table with the following data:

* Client	Code	Date Received	Total Paid
The Lightning Graphics	P-LIGRA0001	23.09.2013	500,00
The Lightning Graphics	P-LIGRA0002	03.05.2013	600,00

The **New** button opens the **New Client Payment** window, where a new payment can be created.

The **Edit** button opens the **Edit Client Payment** window, where the details of the currently selected client payment can be edited.

The **Delete** button deletes the currently selected client payment.

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

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

---

See also:

[Client Window](#)

[Client Payments window](#)

[Creating Payments](#)

# Client Window Refunds Tab

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

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

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

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

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

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

The Lightning Graphics: Refunds										
Main	Contacts	Marketing	Prices	Quotes	Projects	Client Jobs	Invoices	Credit Notes	Payments	Refunds
New		Edit		Delete		Status: *All*	Client Currency: USD			
*	Code	Client	Date Sent	Total Paid	Linked	Currency				
▶	R-LIGRA0001	The Lightning Graphics	08.06.2017	360,00	360,00	USD				

---

See also:

[Client Window](#)

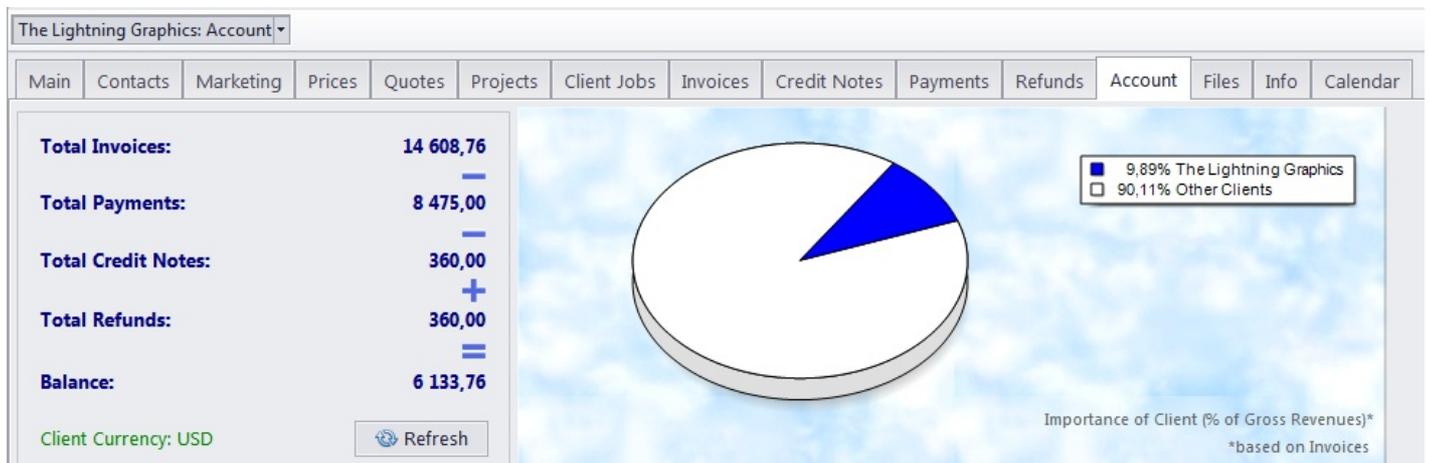
[Client Refunds window](#)

[Creating Refunds](#)

# Client Window Account Tab

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

- Totals of payments, invoices, credit notes, refunds and the account balance as calculated from the previous figures;
- A pie chart showing the share of this client in your Gross Revenues.



See also:

[Client Window](#)

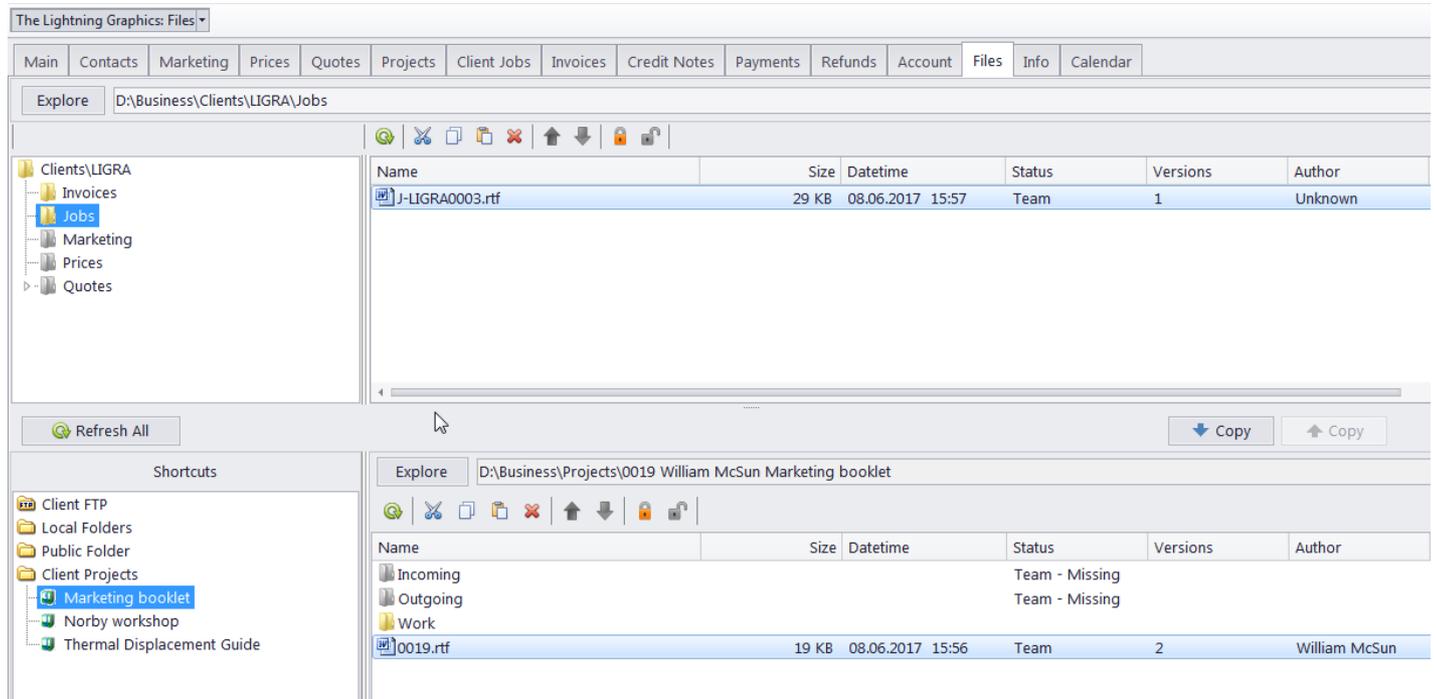
[Client Accounts](#)

# Client Window Files Tab

The **Files** tab of the **Client** window is used to manage the files and folders related to a particular client.

A client's files consist of invoices and quotes, as well as jobs, prices, etc.

The main file manager window consists of two horizontal panes. The upper pane shows the folder tree for the selected client folder and the content of the currently selected sub-folder. The lower pane gives access to shortcuts. Clicking any of the shortcut options will create a second file view field to the right, and open the appropriate folder there. This allows to simultaneously work with two opened folders in the same window.



Files can be exchanged between the client folder and existing Shortcuts using the two **Copy** buttons.

 - is used to copy files from the path currently opened in the Shortcuts pane to the client folder.

 - is used to copy files from the client folder to the path currently opened in the Shortcuts pane.

The context menu contains the following specific file operations:

The **Open** command opens the file in appropriate application

The **Upload** command uploads the file from the local *Business* folder to the *BusinessServer* folder on the Projetex Server Administrator PC.

The **Download** command downloads the file from the *BusinessServer* folder on the Projetex Server Administrator PC to the *Business* folder on the Workstation PC.

The **Download version** opens window that contains information about all versions of particular files.

Each file can have one of the following statuses:

**Team** - the files stored in the *BusinessServer* folder on the server and in local storage are identical.

**Team - Changed on Workstation** - the local copy of the file has been modified, the file on the server has not been updated.

**Team - Changed on Server** - the file on the server has been modified, the local copy has not been updated.

**Team - Missing** - the file exists on the server, but has not been downloaded to the local PC yet (or has been deleted locally).

**Local** - the file exists locally, but has not been uploaded to the server yet (or has been deleted on the server).

See also:

[Client Window](#)

[Working with files in Projetex](#)

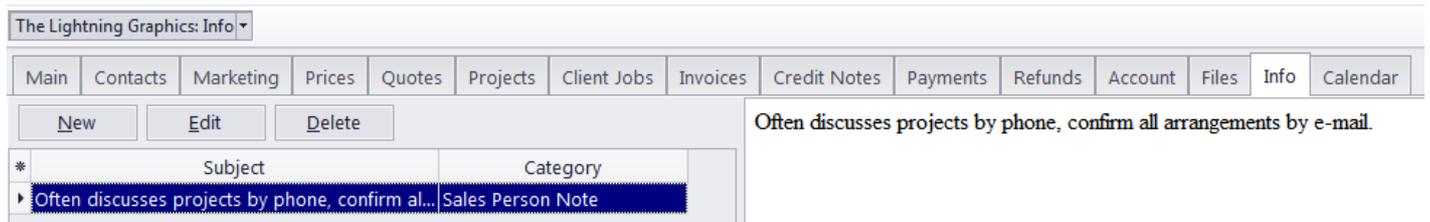
# Client Window Info Tab

The **Info** tab of the **Client** window can be used to enter any optional additional information regarding the selected client in plain text format. These notes will be available to all project manager users.

Each note record consists of the following elements:

- **Subject** — maximum 100 characters long.
- **Category** — new note categories can be added with the help of the **Corporate Settings >> Categories** menu in the **Backstage** view.
- **Information** — a plain text note with no maximum length.

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



The screenshot shows the 'The Lightning Graphics: Info' window. At the top, there is a navigation bar with tabs: Main, Contacts, Marketing, Prices, Quotes, Projects, Client Jobs, Invoices, Credit Notes, Payments, Refunds, Account, Files, Info, and Calendar. Below the navigation bar are three buttons: New, Edit, and Delete. To the right of these buttons is a text area containing the note: 'Often discusses projects by phone, confirm all arrangements by e-mail.' Below the navigation bar and buttons is a table with two columns: Subject and Category. The table contains one row with the following data:

*	Subject	Category
▶	Often discusses projects by phone, confirm al...	Sales Person Note

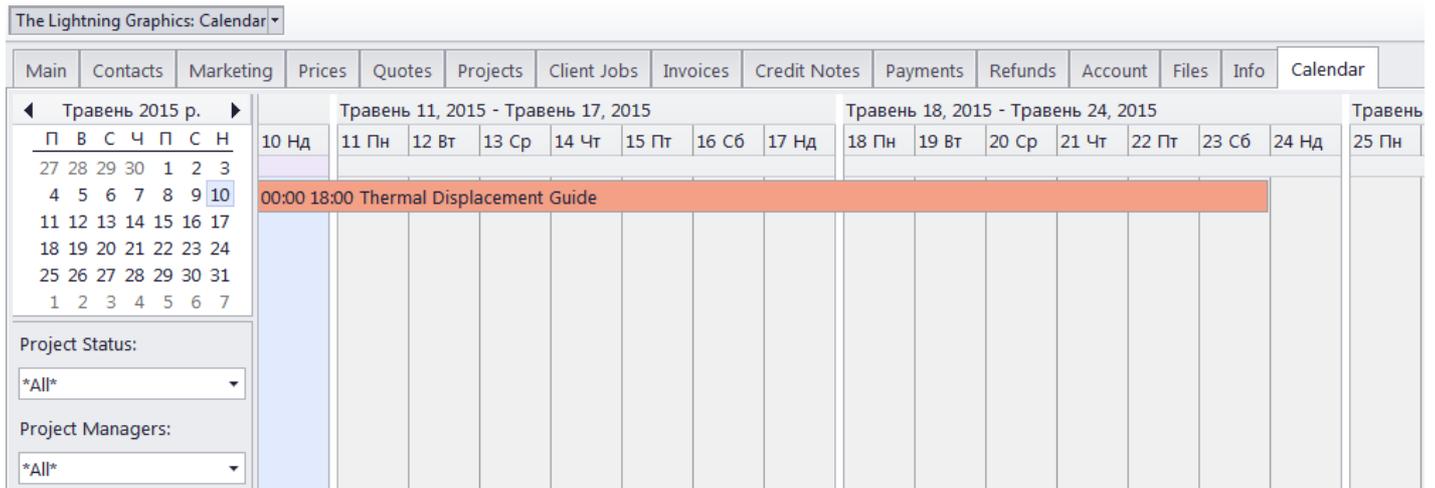
See also:

[Client Window](#)

[Categories](#)

# Client Window Calendar Tab

The **Calendar** tab of the **Client** window displays the time constraints and status of this client's *projects*. Each project block stretches across the calendar from assignment until completion, or until deadline if the project has not been completed yet. Double-click any block to open the **Edit Project** window for this project.



## Settings for the Calendar view

The following settings for the calendar page are available:

**Viewed period** - the Ribbon displays icons for selecting the time interval to be viewed and moving backward and forward interval by interval.

**Mini-calendar** - the mini-calendar on the left displays the month and date currently viewed. Click a date to switch to it. To move to a different month, click the greyed-out dates, the Back and Forwards buttons in the month header, or the header itself. Click a day and drag to view all the days you drag across.

## Project calendar colors

Like the projects they represent, the project calendar bars can have different colors, depending on the statuses of the corresponding projects:

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

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

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

**Grey** — the project is *anceled*.

**Pale Pink** — the project is *completed*.

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

**Pale Orange** — the project is *On Hold*.

## Filtering Project Calendars

Use the **Project Status** filter to display only projects with a certain Status.

Use the **Project Manager** filter to display only the projects led by a specific *Project Manager*.

---

See also:

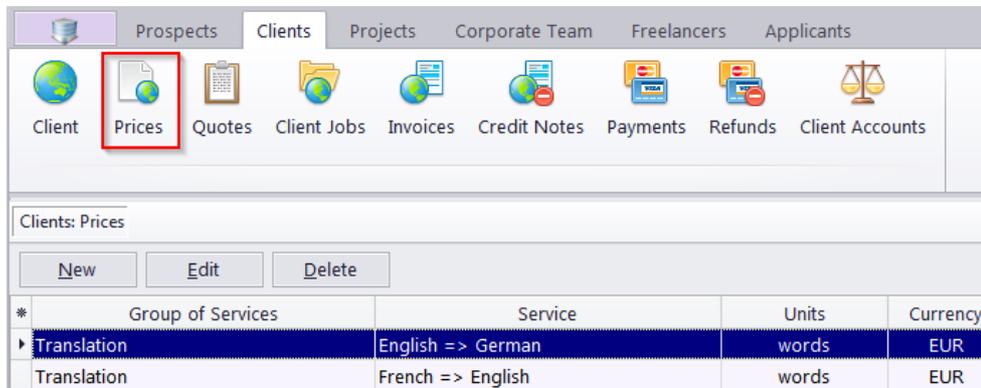
Client Window

The Calendar

# Client Prices window

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

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



The **New** button opens **New Price** window, where the details of a new price can be added.

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

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

Double-click any price record in the table to edit that price.

DTP Tasks	DTP in Adobe FrameMaker	hours	EUR	35,00
Testing	Testing of Localized Software	hours	EUR	35,00

10 of 24

RTF Templates: Company Profile with Prices - Template - English.rtf

The **Save** button saves the current price list in an *RTF*, *DOC* or *PDF* document.

The **Save & Open** button saves the current price list in *RTF*, *DOC* or *PDF* format, and then opens this document.

The **Print** button opens the printer settings, which can be used to print the document.

The **Send Mail** button opens the Mail Sender, with the Subject automatically filled in and the created document attached.

To configure the price list templates, in the Backstage view click **Corporate Settings** and then click **Templates**. Price list templates are stored in the *D:\BusinessServer\Templates\CLIENTS\Prices\* folder.

See also:

Prices Tab of Client Window

Managing price lists

# Client Quotes window

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

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

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

To quickly create a project based on a quote, select it and click the **Create project Based on Quote** button. This will create a project with the same timeline and client jobs as in the quote on which this project is based. If the quote folder contains any files, Projotex will query whether these files must be copied to the project folder of the new project.

**Note:** After a project based on a quote has been created, information about the quote related to this project will be available in the Edit Project window and in the Project profile of the Project window.

* Code	Clone	Client
Q-NETCOM0	Create Project Based on Quote	k Community Technolo
Q-DEFDES001	Pellentesque at ante	Definition Designs
Q-INTSEC000	Nulla quam.	Internet Security Technologies
Q-INTSEC000	Suspendisse posuere	Internet Security Technologies
Q-LIGRA0001	Cras eget mi.	The Lightning Graphics
Q-DEFDES001	www.translation3000.com	Definition Designs

* Name	Group of Services
Pellentesque at ante	Translation

## Quote Status

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

- **Blue** for unknown quote status
- **Green** for accepted quote status
- **Red** for rejected quote status
- **Purple** for received or corrected quote status

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

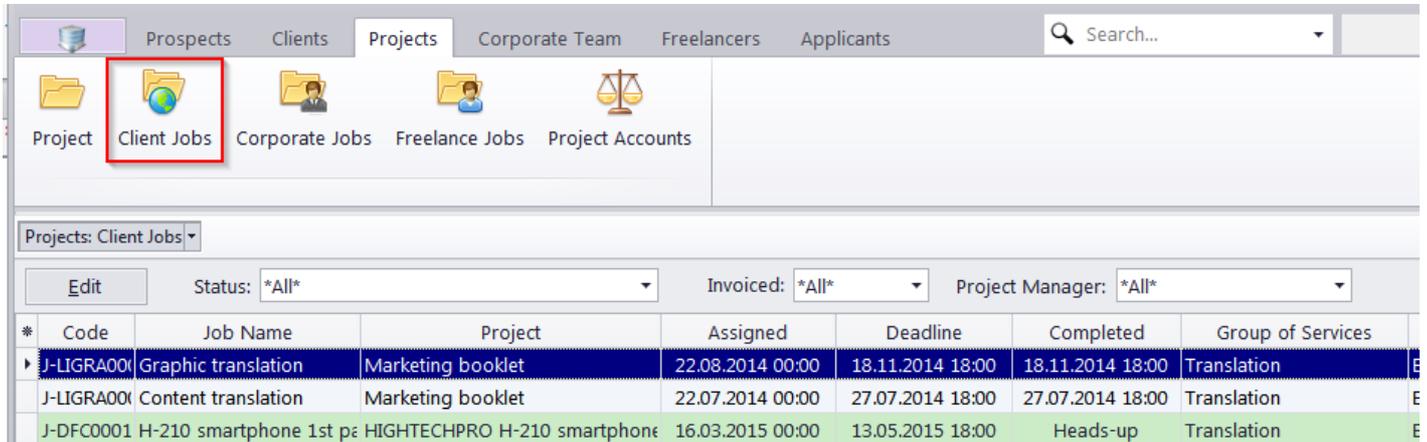
See also:

Quotes Tab of Client Window

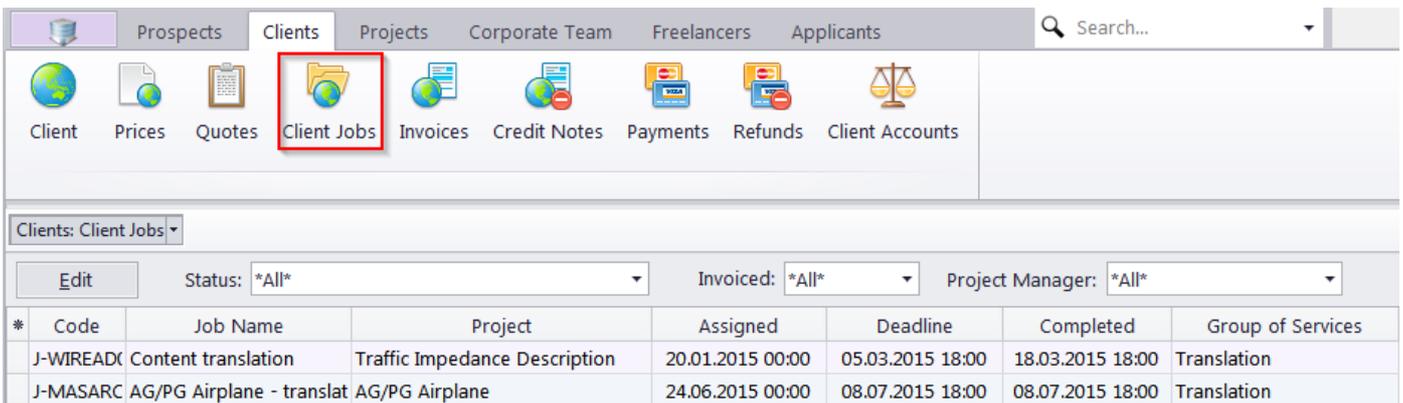
# Client Jobs window

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

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



* Code	Job Name	Project	Assigned	Deadline	Completed	Group of Services
J-LIGRA00	Graphic translation	Marketing booklet	22.08.2014 00:00	18.11.2014 18:00	18.11.2014 18:00	Translation
J-LIGRA00	Content translation	Marketing booklet	22.07.2014 00:00	27.07.2014 18:00	27.07.2014 18:00	Translation
J-DFC0001	H-210 smartphone 1st p	HIGHTECHPRO H-210 smartphone	16.03.2015 00:00	13.05.2015 18:00	Heads-up	Translation



* Code	Job Name	Project	Assigned	Deadline	Completed	Group of Services
J-WIREAD	Content translation	Traffic Impedance Description	20.01.2015 00:00	05.03.2015 18:00	18.03.2015 18:00	Translation
J-MASARC	AG/PG Airplane - translat	AG/PG Airplane	24.06.2015 00:00	08.07.2015 18:00	08.07.2015 18:00	Translation

## Filters

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

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

The **Project Manager** filter drop-down list allows you to view only jobs managed by a particular *Project Manager*.

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

## Client Job statuses

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

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

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

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

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

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

---

---

See also:

[Client Jobs Tab of Client Window](#)

[Client Jobs Tab of Project Window](#)

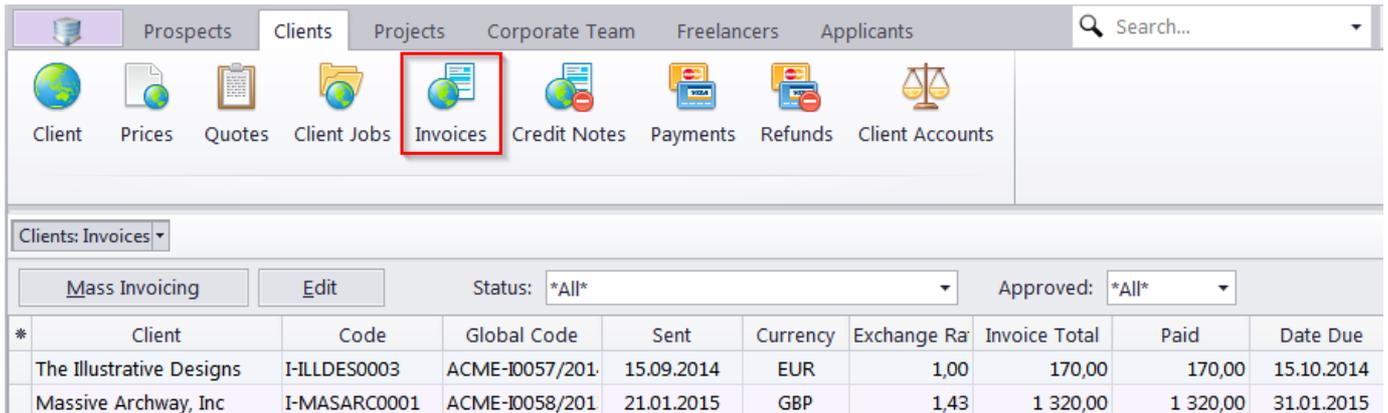
# Client Invoices window

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

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

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

The **Mass Invoicing** button can be used to quickly create multiple invoices for multiple different clients with a few clicks.



* Client	Code	Global Code	Sent	Currency	Exchange Ra	Invoice Total	Paid	Date Due
The Illustrative Designs	I-ILLDES0003	ACME-10057/201	15.09.2014	EUR	1,00	170,00	170,00	15.10.2014
Massive Archway, Inc	I-MASARC0001	ACME-10058/201	21.01.2015	GBP	1,43	1 320,00	1 320,00	31.01.2015

## Filters

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

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

## Invoice Status

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

**Green** — the invoice is Outstanding and is expected to be paid soon.

**Blue** — the invoice is Outstanding and is expected to be paid today.

**Red** — the invoice is Outstanding and its payment is overdue.

**Black** — the invoice has been Settled (paid) or Voided.

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

Projotex automatically assigns statuses to Invoices depending on the Payment Terms set for each client.

See also:

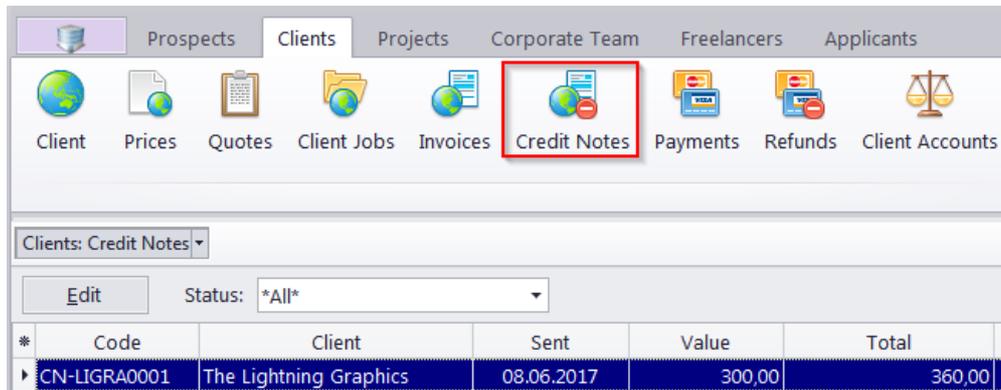
[Invoices Tab of Client Window](#)

# Client Credit Notes window

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

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

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



## Credit Note Statuses

Credit notes can have one of four statuses:

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

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

---

See also:

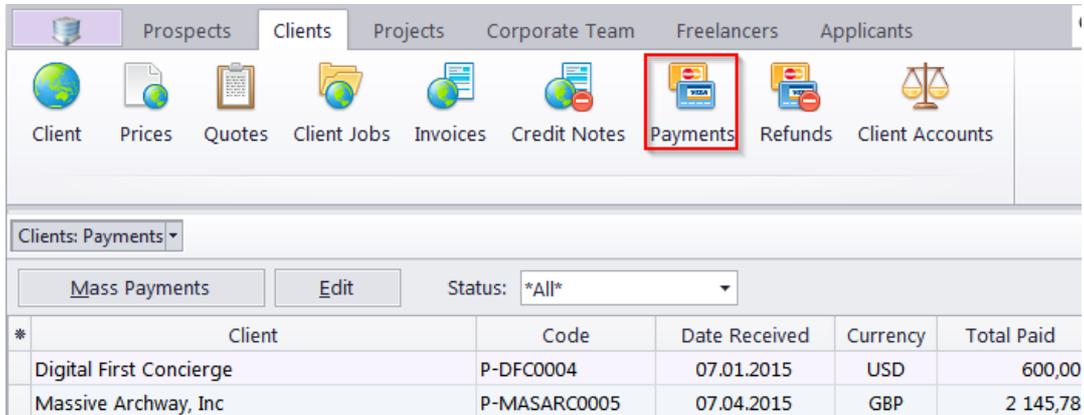
Credit Notes Tab of Client Window

# Client Payments window

The **Payments** window displays all payments from all clients in one table. This window can be used to obtain total values of money transfers received from clients, as well as to register multiple payments in one session.

New payments cannot be created and existing payments cannot be deleted using this window.

The **Mass Payments** button can be used to quickly create multiple payments to multiple different clients with a few clicks.



* Client	Code	Date Received	Currency	Total Paid
Digital First Concierge	P-DFC0004	07.01.2015	USD	600,00
Massive Archway, Inc	P-MASARC0005	07.04.2015	GBP	2 145,78

Use the **Status** filter drop-down list to display only payments which are still need to be linked with invoices, or only those which have been fully linked with invoices.

---

See also:

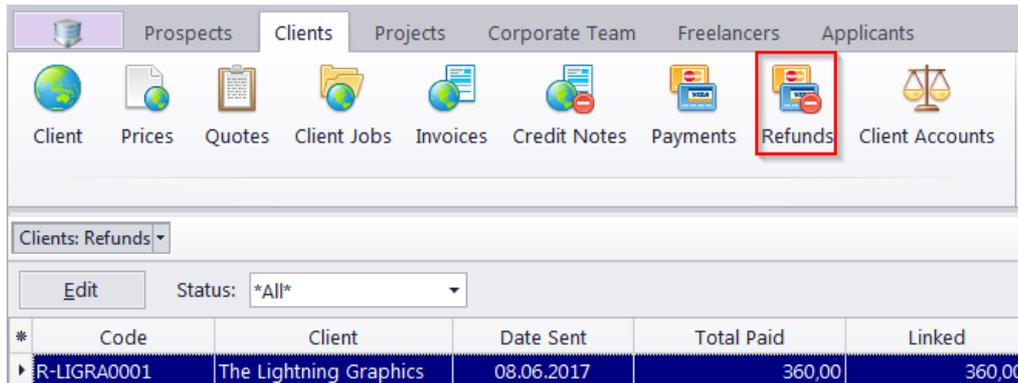
Payments Tab of Client Window

# Client Refunds window

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

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

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



* Code	Client	Date Sent	Total Paid	Linked
▶ R-LIGRA0001	The Lightning Graphics	08.06.2017	360,00	360,00

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

---

See also:

Refunds Tab of Client Window

# Client Accounts window

The **Client Accounts** window presents a simplified balance of your clients' accounts, based on their payments and invoices. It has the following figures:

- **Total Invoices (All Clients)** — the sum of all invoice totals of all clients.
- **Total Payments (All Clients)** — the sum of all payments from all clients.
- **Total Credit Notes (All Clients)** — the sum of all credit notes from all clients.
- **Total Refunds (All Clients)** — the sum of all refunds to all clients.
- **Accounts Receivable** — the margin calculated as "Total Invoices - Total Payments - Total Credit Notes + Total Refunds"

* Client	Currency	Invoices(EUR)	Credit Notes (EUR)	Payments(EUR)
Key Outsourcing Studios	EUR	6 990,00	0,00	5 830,00
Internet Unified Corp.	EUR	6 713,01	0,00	6 713,01

This balance can be viewed separately for each client in the table below.

Accounts can be viewed both in the client currency and your base currency: use the **View** drop-down list to select in which currency do you wish to view records. Alternatively you can use the **Customize columns** option to add columns to the view. The columns containing a currency abbreviation in their header display records in your base currency.

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

See also:

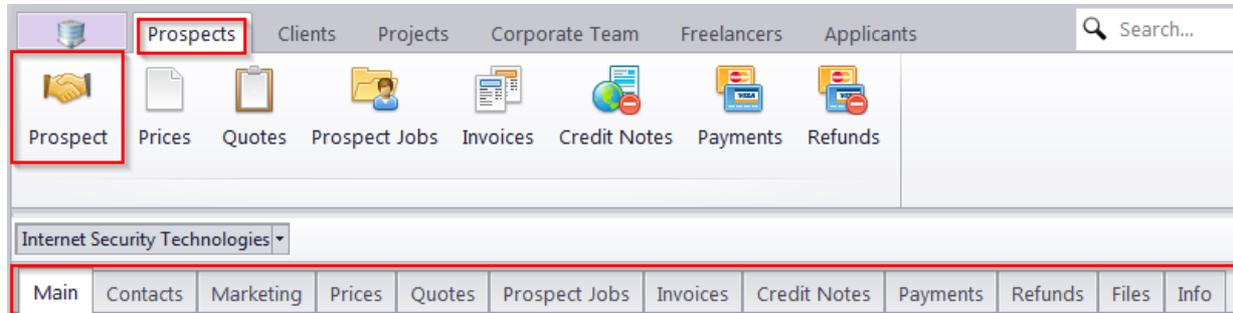
Account Tab of Client Window

# Prospect Window

The **Prospect** window can be used to view, edit and enter new information about your *prospective clients*, as well as to manage *marketing* and *financial information*, like prices and quotes of your prospects.

When the deal is struck a prospect can be quickly converted into a full client.

It can also be used to store information and documentation of former or temporarily unavailable clients.



## Prospect Window tabs

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

- The **Main** tab — contains the profiles of your prospects and basic information on them.
- The **Contacts** tab — lists the contacts of the selected prospect. New prospect contacts can be added here.
- The **Marketing** tab — contains marketing information added by your sales representatives or marketing staff.
- The **Prices** tab — holds the individual price list of the selected prospect. Here this prospect's prices can be created and edited.
- The **Quotes** tab — is used for issuing and managing quotes offered to the selected prospect.
- The **Prospect Jobs** tab — this tab contains the client jobs of the selected former or inactive client.
- The **Invoices** and **Payments** tabs — these tabs hold all invoices issued to and payments made by the selected former or inactive client.
- The **Credit Notes** and **Refunds** tabs — these tabs contain all credit notes received from and refunds issued to the selected former or inactive client.
- The **Files** tab — this tab is used for accessing the selected prospect's files and folders.
- The **Info** tab — is used for adding various prospect-related notes.

---

See also:

Workspace Icons

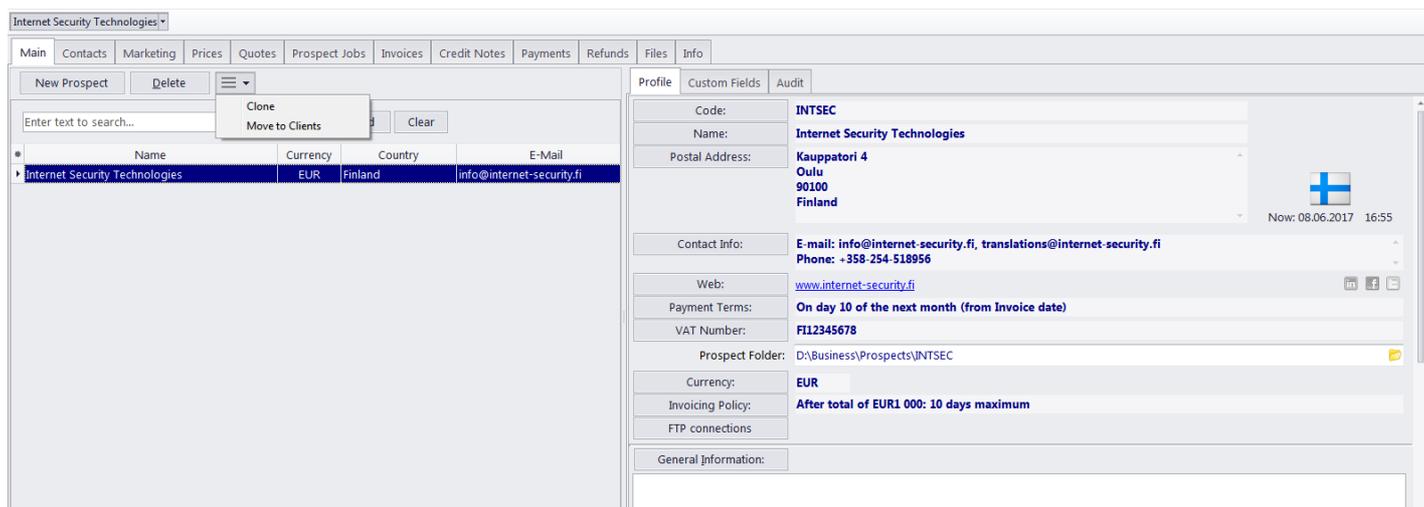
# Prospect Window Main Tab

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

## Prospect list

You can search the prospects list using the **Find** panel. Enter a few characters from the prospect's name, or any other column displayed in the table, and the table will show only those entries that contain the characters.

- Click any prospect in the list to view and edit the profile of this prospect to the right.
- Once a new prospect has been added, their data can be edited in this profile.
- You can create a new prospect record based on data (profile, marketing, contact or pricing) of one of the existing prospects by cloning this record. To do so, select a prospect to clone, click the **More...** button next to the **Delete** button, and select **"Clone"**
- Once an agreement with a prospective client is reached, and they become an active client, click the **More...** button and select **"Move to clients"**.
- You can delete a prospect and all data related to this prospect (quotes, projects, jobs, invoices, etc.). To do so, select a prospect to delete, and click the **Delete** button.



- Each prospect can have a flag assigned to it. A prospect flag can be changed by right-clicking the entry and selecting a flag.

Prospects are listed in the form of a table. You can change the columns displayed in the table by using the **Customize Columns** option.

**Note:** Due to user access restrictions, some filter operations (like the local custom filter and the global date filter) or page settings, you may not be able to see all the prospects in the database.

## The Prospect's profile

On the right side of the **Main** client tab, you have three tabs: **Prospect Profile**, **Custom Fields** and **Audit** which allow you to review and modify the prospect's information. Click the appropriate buttons to add or edit client profile information.

- **Prospect code** — click this button to enter or change the prospect's code (15 characters maximum) and, optionally, add the prospect's logo. This is the same code, which had been assigned, manually or automatically, when creating the new prospect record. This code is also used for naming prospect folders as well as in codes for Invoices and Quotes.
- **Name** — click this button to edit this prospect's name. This name can be up to 150 characters long.
- **Postal Address** — click this button to add or change the postal address of the prospect. See the Postal address of prospect topic for more details.
- **Contact Info** — allows you to add or change the contact information of the prospect. See the General contact information topic for more details.
- **Web** — opens the **Edit Web Links** dialog box, providing fields for the web site address (URL), LinkedIn, Facebook, and Twitter accounts of your client. Click the address or the social media icons to open the corresponding links in your Internet browser.
- **Payment Terms** — allows you to specify the payment terms for each prospect, and their minimum fees. When the prospect is converted into a client, Projotex will use these settings to determine if your invoices to the new client are outstanding, overdue or will be due soon.
- **VAT Number** — enter the prospect's legal tax number to have it automatically displayed and printed on invoices when the prospect is converted into a client.
- **Prospect Folder** — this part of the prospect's profile can be used to quickly access the prospect's files. The location of the prospect folder will depend on the **location of the centralized Business folder**, assigned with the help of the Projotex Server Administrator. Click the folder button on the right side of the field to open the prospect's folder (and create it if it does not exist yet) in the Projotex 3D Explorer window.
- **Prospect Currency** — this currency will be used to issue quotes to this prospect. All the financial records for this prospect are kept in both your base currency and the prospect currency, converted according to exchange rates which you set.
- **Invoicing Policy** — by adjusting the invoicing policy you determine the conditions upon which Projotex will prompt you to invoice jobs if the prospect becomes a full client.
- **FTP connections** — here you can set the parameters for access to the FTP folders of this prospect. Shortcuts to these folders will be automatically added to the **Files** tab of this prospect's window. See the Prospect FTP connections topic for more details.
- **General Information** — any additional information which did not fit into any of the other sections can be entered here.

## Prospect custom data

The prospect database can be customized by adding custom fields. Any custom fields which have been added to the client database are also added to the prospect database, and can be accessed by clicking the **Custom Fields** tab, next to the **Prospect Profile** tab.

**Note:** Only users with access to the Projotex Server Administrator can add or remove custom fields.

## Audit

The **Audit** tab keeps track of when and by whom a prospect profile was created or modified.

See also:  
[Adding/Editing Client/Prospect Profile](#)

# Postal address of prospect

The prospect's postal address determines this prospect's business location, and is automatically added to the invoices and quotes sent to this prospect. The following postal address data can be added:

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

**City** — maximum 40 characters long.

**State** — maximum 40 characters long.

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

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

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

The image shows two overlapping windows from a software application. The left window is titled 'Edit Postal Address' and contains the following fields: 'Street Address' with the value 'Kauppatori 4', 'City' with 'Oulu', 'State' (empty), 'ZIP Code' with '90100', and 'Country' with a dropdown menu showing 'Finland'. Below these fields, it displays 'Local Time: 08.06.2017 17:13' and a 'Time Zone' dropdown menu with '(UTC+02:00) Helsinki, Kyiv, Riga, Sofia, Tallinn, Vilnius' selected. The right window is titled 'Time Zone Settings' and shows 'Set the Time Zone:' with the same dropdown menu selected. Below it, it displays 'Current date and time: 08.06.2017 17:13'. Both windows have 'OK' and 'Cancel' buttons at the bottom.

See also:

Main Tab of Prospect Window

# General contact information

Prospects in Projetex have two types of contact information: general contact information (usually of a company rather than a person) and the contact information of the contact information of prospect's contact persons (Contacts Tab of Prospect Window). General contact information of a prospect can contain the following data:

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

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

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

General contact information of a prospect can also be added to templates with the help of Client Template Variables

The screenshot shows a software interface with three tabs: 'Profile', 'Custom Fields', and 'Audit'. The 'Contact Info' tab is selected and highlighted with a red box. Below the tabs, the contact information is displayed: 'E-mail: info@internet-security.fi, translations@internet-security.fi' and 'Phone: +358-254-518956'. Below this is a dialog box titled 'Edit Contact Info' for 'Internet Security Technologies'. The dialog contains several input fields: 'E-mail' (with 'info@internet-security.fi' entered and a 'Send' button), 'E-mail 2' (with 'translations@internet-security.fi' entered and a 'Send' button), 'Phone' (with '+358-254-518956' entered), 'Phone 2', 'Phone 3', 'Phone 4', 'Fax', and 'Notes' (a large text area). At the bottom of the dialog are 'OK' and 'Cancel' buttons.

---

See also:

Main Tab of Prospect Window

# Payment terms of prospect

According to the payment terms of a prospect, Projetex will keep track of unpaid invoices and update the status of outstanding invoices once the prospect is converted into a full client: overdue, due today, due tomorrow, and so on. This section also server to store the payment terms of a former or inactive client.

See Payment terms of client for more information

The screenshot shows a software window titled "Edit Payment Terms" with a close button (X) in the top right corner. At the top, there are three tabs: "Profile", "Custom Fields", and "Audit". Below the tabs, a blue button labeled "Payment Terms:" is highlighted with a red rectangle. To its right, the current payment terms are displayed: "On day 10 of the next month (from Invoice date)".

Below this, the text "Between: Vitaliy Gutyk" and "and: Internet Security Technologies" is shown. A "Minimum Fee:" field contains the value "0" and is followed by the text "(0 - No Minimum Fee)".

There are five radio button options for payment terms:

- Within 30 days
- On day 10 of the same month
- On day 10 of the next month
- On day 10 of the month following next
- Unknown/Other

Below the radio buttons is an "Additional Notes:" section with a large empty text area. At the bottom of the dialog are "OK" and "Cancel" buttons.

---

See also:

Main Tab of Prospect Window

# Invoicing policy of prospect

The invoicing policy settings determine when Projetex alerts the user to invoice a client job. In the Prospects database, this section serves to store invoicing policies in preparation for the conversion of the prospect to a full client, or to store the policy of a former, inactive client.

See Invoicing policy of client for more information

The screenshot shows a software interface with three tabs: 'Profile', 'Custom Fields', and 'Audit'. The 'Invoicing Policy:' tab is highlighted with a red box. To its right, the text 'After total of EUR1 000: 10 days maximum' is displayed. Below this is a dialog box titled 'Edit Invoicing Policy'. Inside the dialog, it says 'Between: Vitaliy Gutyk and: Internet Security Technologies'. Under the heading 'Invoice Client Jobs', there are two radio button options: 'Immediately after completing job' (unselected) and 'Only after total of invoiced jobs reaches' (selected). Below the second option is a text input field containing '1000,00'. There is a checked checkbox labeled 'Wait accrual no longer than' followed by a text input field containing '10' and the word 'days'. At the bottom right of the dialog, it says 'Client Currency: EUR'. At the very bottom of the dialog are 'OK' and 'Cancel' buttons.

---

See also:

Main Tab of Prospect Window

# Prospect FTP connections

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

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

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

**FTP Server** — the address of the FTP server (for example ftp.server.com). Can be no longer than 50 characters. You can also specify which **Port** to use.

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

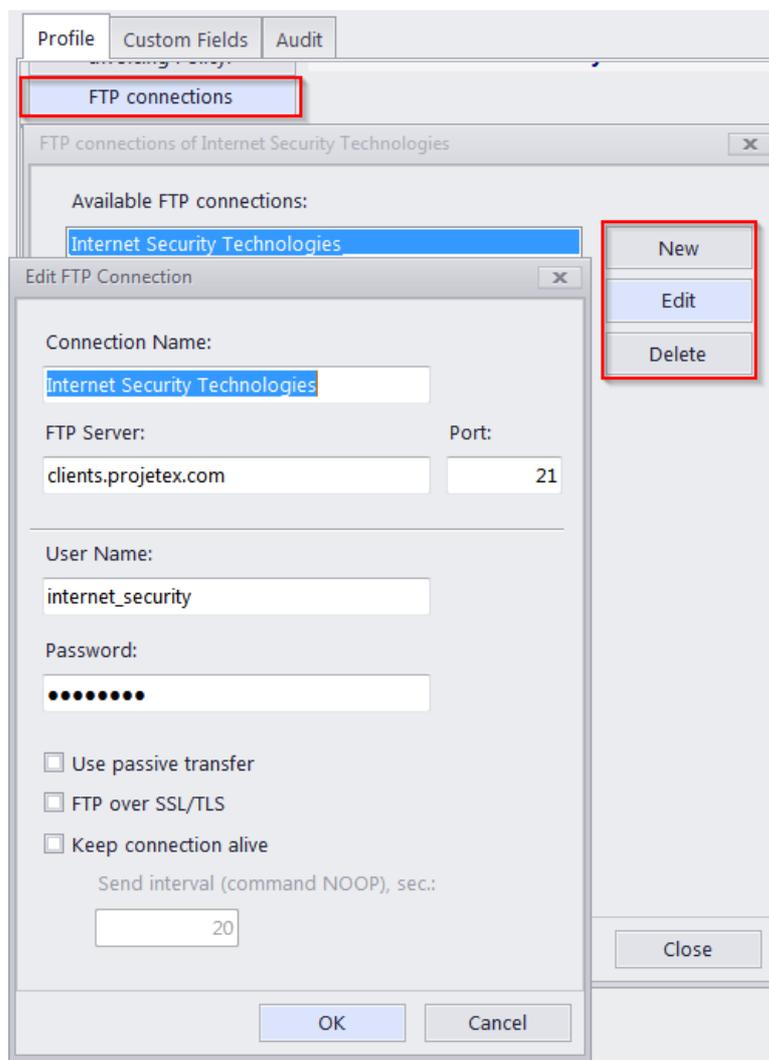
**Password** — this password will be used when Projetex attempts to connect to the FTP folder. Can be no longer than 50 characters.

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

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

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

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



See also:

Main Tab of Prospect Window



# Prospect Window Contacts Tab

A prospect's *Contacts* are persons on the client side which your managers work with regarding this prospect's potential projects. The **New** button opens the **New Contact** window, where the details of a new contact person can be added.

The **Edit** button opens the **Edit Contact** window, where the details of the currently selected contact person can be edited.

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

The **Clone** button creates a complete copy of the currently selected contact and adds it to the list of this prospect's contacts. The cloned contact will have the *(Cloned contact)* text in front of the contact name.

Internet Security Technologies: Contacts ▾						
Main	Contacts	Marketing	Prices	Quotes	Prospect Jobs	Invoices
New		Edit		Delete		Clone
*	Position	Salutation	Name		E-mail	
▶	Project Manager	Mrs.	Charlotta Rintala		charlotta@inte...	
	Project Manager	Mrs.	Tania Orsborn		projects@inter...	

---

See also:

[Prospect window](#)

[General contact information](#)

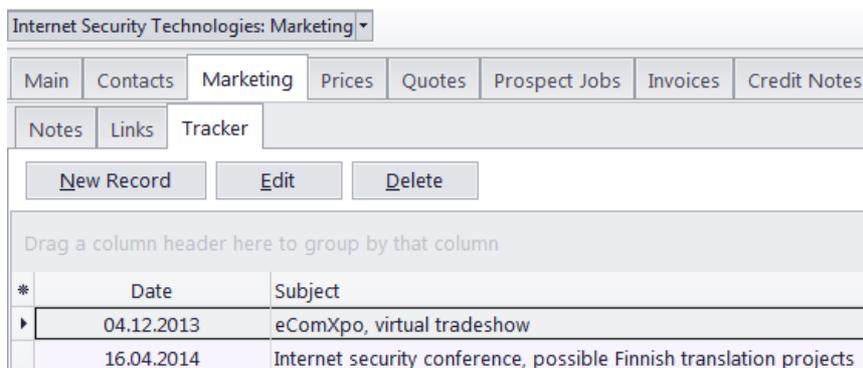
# Prospect Window Marketing Tab

The **Marketing** tab of the **Prospect** window stores marketing information about the selected prospect. This includes a general note, Marketing links (URL and e-mail) and a log of timed marketing records (**Marketing Tracker**).



The **Marketing Tracker** can contain any number of records, each having a **Date**, **Subject** (250 characters maximum) and **Description** (plain text note with no length limitation).

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



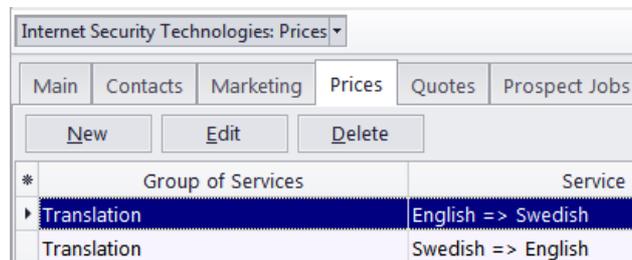
See also:

Main Tab of Prospect Window

# Prospect Window Prices Tab

Each prospect in Projetex can have a set of prices individual to them. These prices can be assigned on the **Prices** tab of the **Prospect** window.

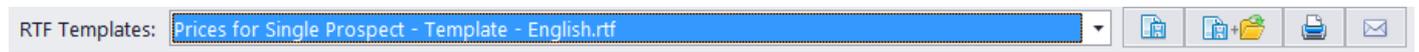
Only one price per group of services, service and unit combination can exist in an individual price-list.



The **New** button opens the **New Price** window, where the details of a new price can be added.

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

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



You can print a prospect's price list or save it in a text file by selecting the template and clicking the **Save**, **Save & Open** or **Print** button at the bottom of the window.

You can also click the **Send Mail** button to open the Projetex Mail Sender and send it to the Prospect's E-mail address as an attachment.

---

See also:

[Main Tab of Prospect Window](#)

[Prospect Prices window](#)

[Managing price lists](#)

# Prospect Window Quotes Tab

The **Quotes** tab of the **Prospect** window is designed to create and manage quotes for each prospect in the database. A quote can contain a number of draft prospect jobs, each job representing a service and its price being quoted. Like most workflow documents in Projextex, quotes can be saved to a printable file, printed, or sent via E-mail.

## Prospect Quote Buttons

Quote management buttons are located on the left side of the **Quotes** tab of the **Prospect** window.

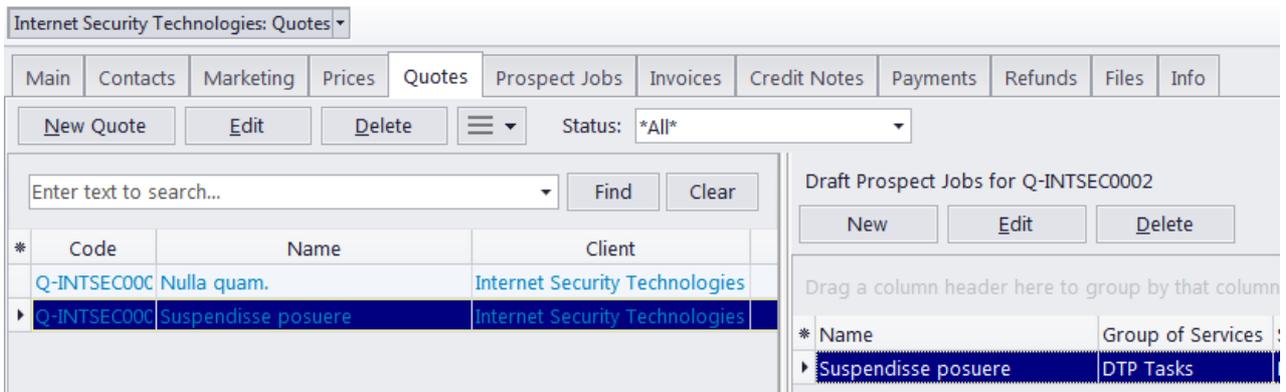
The **New Quote** button opens the **New Prospect Quote** window, where the details of a new prospect quote can be added.

The **Edit** button opens **Edit Prospect Quote** window, where the details of the currently selected quote can be edited.

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

**Clone** will create a full copy of the selected quote, which can be used if you want to create a similar quote.

The **Status** filter drop-down list can be used to display only the quotes with certain status.



## Draft Prospect Job Buttons

The buttons for management of draft prospect jobs are located on the right side of the **Quotes** tab of the **Prospect** window.

The **New** button opens the **New Draft Prospect Job** window, where the details of a new draft prospect job can be added.

The **Edit** button opens the **Edit Draft Prospect Job** window, where the details of the currently selected draft prospect job can be edited.

The **Delete** button deletes the currently selected draft prospect job.

## Prospect Quote Status

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

- **Blue** for unknown quote status
- **Green** for accepted quote status
- **Red** for rejected quote status
- **Purple** for received or corrected quote status

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

See also:

Main Tab of Prospect Window

Prospect Quotes window

Creating/Editing Client/Prospect Quotes

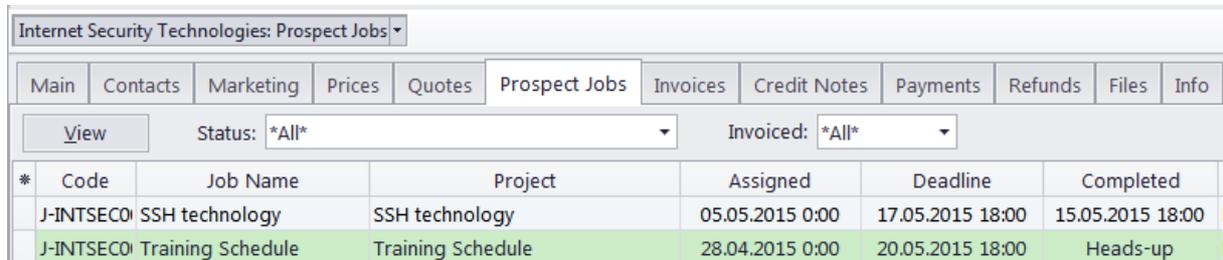
# Prospect Window Prospect Jobs Tab

**Prospect Jobs** belonging to all projects of the currently selected former or inactive client can be viewed on the **Prospect Jobs** tab of the **Prospect** window.

Jobs can not be created, deleted, or edited here. This tab serves only to store previously created jobs.

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

With the help of the **Invoiced** filter drop-down list you can view only the prospect jobs which have or have not been invoiced.



*	Code	Job Name	Project	Assigned	Deadline	Completed
	J-INTSECO	SSH technology	SSH technology	05.05.2015 0:00	17.05.2015 18:00	15.05.2015 18:00
	J-INTSECO	Training Schedule	Training Schedule	28.04.2015 0:00	20.05.2015 18:00	Heads-up

## Prospect Job Statuses

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

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

**Blue** — the job is *not completed* and *due today*.

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

**Black** — the job is *completed*.

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

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

**Orange background** — *On Hold* status

**Green background** — *Heads-Up* status

**Grey background** — *Canceled* status

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

---

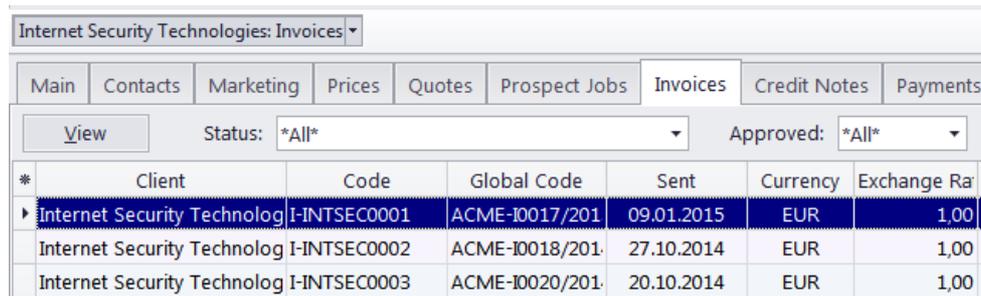
See also:

Main Tab of Prospect Window

Prospect Jobs window

# Prospect Window Invoices Tab

The **Invoices** tab of the **Prospect** window is used to keep record of invoices issued to currently selected former or inactive client. Invoices can not be created, deleted, or edited here. This tab serves only to store previously issued invoices.



The screenshot shows the 'Internet Security Technologies: Invoices' window. It has a navigation bar with tabs: Main, Contacts, Marketing, Prices, Quotes, Prospect Jobs, Invoices (selected), Credit Notes, and Payments. Below the tabs is a 'View' button and two filter dropdowns: 'Status: \*All\*' and 'Approved: \*All\*'. The main area contains a table with the following data:

* Client	Code	Global Code	Sent	Currency	Exchange Ra
Internet Security Technolog	I-INTSEC0001	ACME-I0017/201	09.01.2015	EUR	1,00
Internet Security Technolog	I-INTSEC0002	ACME-I0018/201	27.10.2014	EUR	1,00
Internet Security Technolog	I-INTSEC0003	ACME-I0020/201	20.10.2014	EUR	1,00

## Filters

You can choose to view only invoices with a specific status. To display only the invoices with a particular status, click the **Status** filter drop-down list.

You can also set Projextex to display only those invoices which have or have not been approved by the project manager by applying the **Approved** filter.

## Invoice Statuses

Invoices in the list are shown in different colors. These are determined by the current status of each invoice:

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

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

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

**Black** — the invoice has been *settled* (paid) or voided.

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

See also:

Main Tab of Prospect Window

Prospect Invoices window

# Prospect Window Credit Notes Tab

The **Credit Notes** tab of the **Prospect** window displays Credit notes for the currently selected former or inactive client.

Credit Notes can not be created, deleted, or edited here. This tab serves only to store previously issued credit notes.

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



The screenshot shows the 'Internet Security Technologies: Credit Notes' window. It features a navigation bar with tabs: Main, Contacts, Marketing, Prices, Quotes, Prospect Jobs, Invoices, Credit Notes, and Payments. Below the navigation bar is a 'View' button and a 'Status' dropdown menu set to '\*All\*'. The main area contains a table with the following data:

* Code	Client	Sent	Value	Total
▶ CN-INTSEC0001	Internet Security Technologies	09.06.2017	300,00	300,00

## Credit Note Statuses

Credit notes can have one of four statuses:

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

---

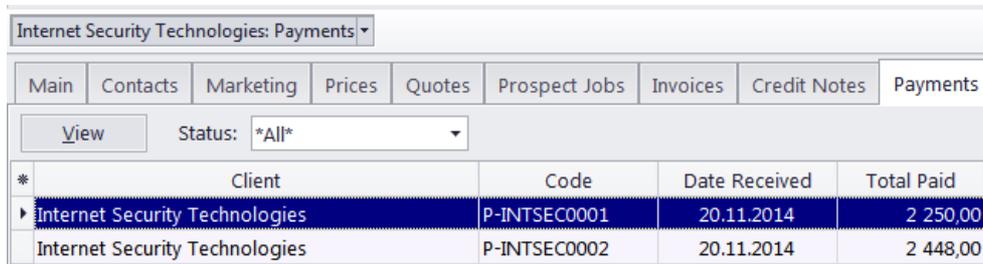
See also:

Main Tab of Prospect Window

Prospect Credit Notes window

# Prospect Window Payments Tab

The **Payments** tab of the **Prospect** window displays the payment records of the currently selected former or inactive client. Payments can not be created, deleted, or edited here. This tab serves only to store previously received payments. Use the **Status** filter drop-down list to display only the payments which are still to be linked with invoices, or only the fully linked ones.



The screenshot shows the 'Payments' tab of the 'Internet Security Technologies' prospect window. The interface includes a navigation bar with tabs for 'Main', 'Contacts', 'Marketing', 'Prices', 'Quotes', 'Prospect Jobs', 'Invoices', 'Credit Notes', and 'Payments'. Below the navigation bar is a 'View' button and a 'Status' filter dropdown menu set to '\*All\*'. The main area contains a table with the following data:

* Client	Code	Date Received	Total Paid
Internet Security Technologies	P-INTSEC0001	20.11.2014	2 250,00
Internet Security Technologies	P-INTSEC0002	20.11.2014	2 448,00

---

See also:

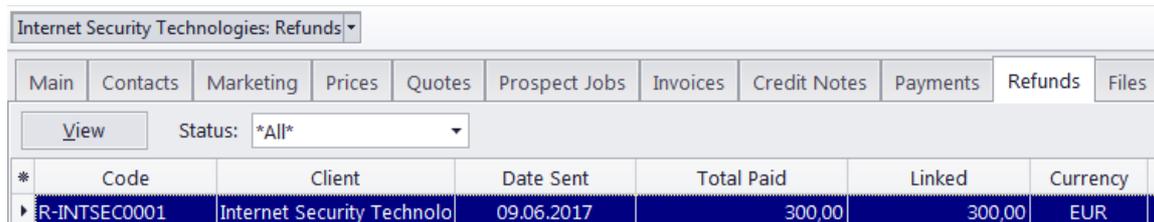
Main Tab of Prospect Window

Prospect Payments window

# Prospect Window Refunds Tab

The **Refunds** tab of the **Prospect** window displays the refund records of the currently selected former or inactive client. Refunds can not be created, deleted, or edited here. This tab serves only to store previously issued refunds.

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



* Code	Client	Date Sent	Total Paid	Linked	Currency
R-INTSEC0001	Internet Security Technolo	09.06.2017	300,00	300,00	EUR

---

See also:

[Main Tab of Prospect Window](#)

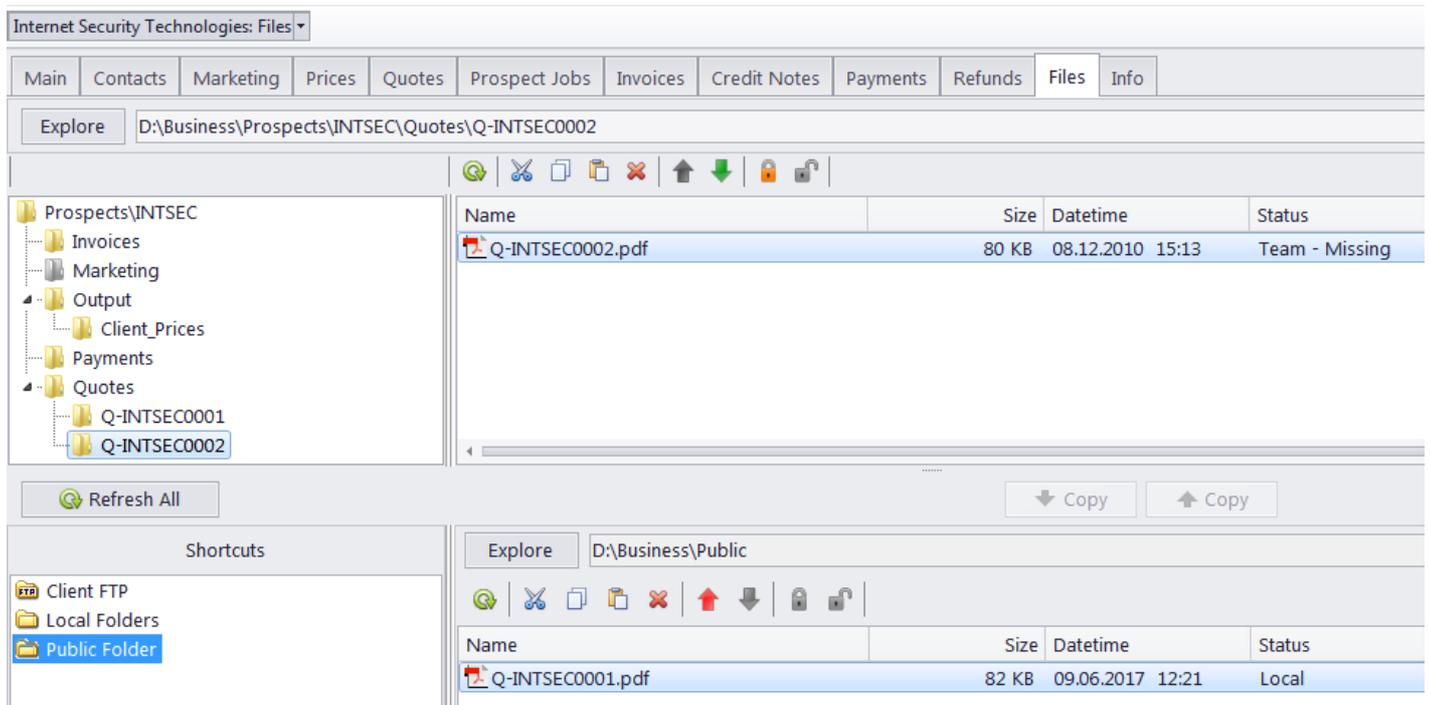
[Prospect Refunds window](#)

# Prospect Window Files Tab

The **Files** tab of the **Prospect** window is used to manage the files and folders related to a particular prospect.

A prospect's files consist mainly of quotes, and other marketing-related information.

The main file manager window consists of two horizontal panes. The upper pane shows the folder tree for the selected Prospect folder and the content of the currently selected sub-folder. The pane underneath gives access to shortcuts. Clicking any of the shortcut options will create a second file view field to the right, and open the appropriate folder there. This allows to simultaneously work with two opened folders in the same window.



Files can be exchanged between the prospect folder and existing Shortcuts using the two **Copy** buttons.

 - is used to copy files from the path currently opened in the Shortcuts pane to the prospect folder.

 - is used to copy files from the prospect folder to the path currently opened in the Shortcuts pane.

The context menu contains the following specific file operations:

The **Open** command opens the file in appropriate application

The **Upload** command uploads the file from the local *Business* folder to the *BusinessServer* folder on the Projetex Server Administrator PC.

The **Download** command downloads the file from the *BusinessServer* folder on the Projetex Server Administrator PC to the *Business* folder on the Workstation PC.

The **Download version** opens window that contains information about all versions of particular files.

Each file can have one of the following statuses:

**Team** - the files stored in the *BusinessServer* folder on the server and in local storage are identical.

**Team - Changed on Workstation** - the local copy of the file has been modified, the file on the server has not been updated.

**Team - Changed on Server** - the file on the server has been modified, the local copy has not been updated.

**Team - Missing** - the file exists on the server, but has not been downloaded to the local PC yet (or has been deleted locally).

**Local** - the file exists locally, but has not been uploaded to the server yet (or has been deleted on the server).

---

See also:

Main Tab of Prospect Window

Working with files in Projetex

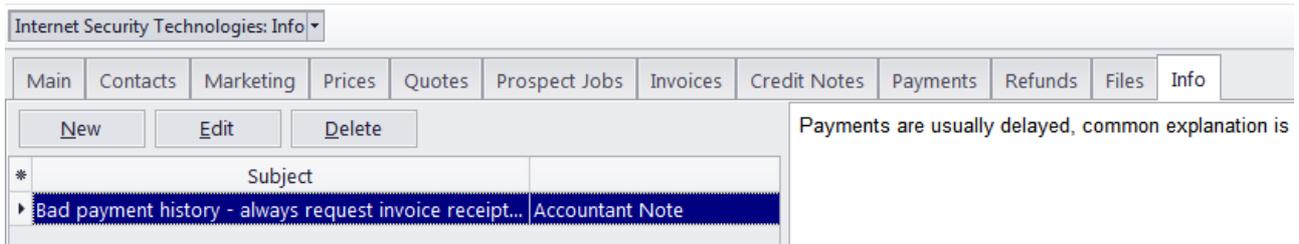
# Prospect Window Info Tab

The **Info** tab of the **Prospect** window can be used to enter any optional additional information regarding the selected prospect in plain text format. These notes will be available to all project manager users.

Each note record consists of the following elements:

- **Subject** — maximum 100 characters long.
- **Category** — new note categories can be added with the help of the **Corporate Settings >> Categories** menu in the **Backstage** view.
- **Information** — a plain text note with no maximum length.

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



---

See also:

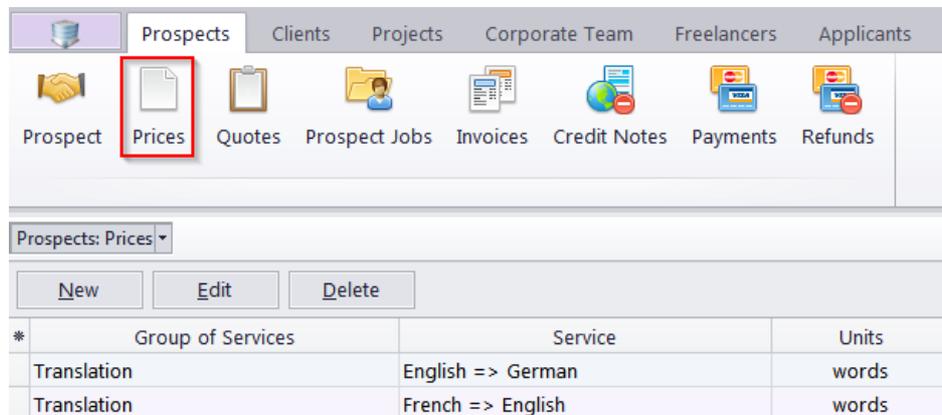
Main Tab of Prospect Window

Categories

# Prospect Prices window

The **Prospect Prices** window displays your general price-list. These prices can be used when creating quotes for any prospect in your database.

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

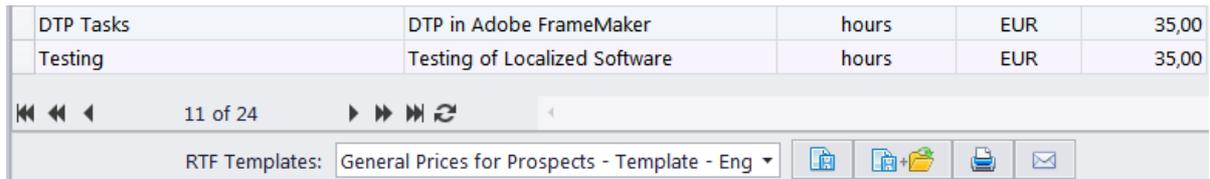


The **New** button opens **New Price** window, where the details of a new price can be added.

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

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

Double-click any price record in the table to edit that price.



DTP Tasks	DTP in Adobe FrameMaker	hours	EUR	35,00
Testing	Testing of Localized Software	hours	EUR	35,00

The **Save** button saves the current price list in an *RTF*, *DOC* or *PDF* document.

The **Save & Open** button saves the current price list in *RTF*, *DOC* or *PDF* format, and then opens this document.

The **Print** button opens the printer settings, which can be used to print the document.

The **Send Mail** button opens the Mail Sender, with the Subject automatically filled in and the created document attached.

To configure the price list templates, in the Backstage view click **Corporate Settings** and then click **Templates**. Price list templates are stored in the *D:\BusinessServer\Templates\PROSPECT\Prices* folder.

---

See also:

Prospect Window

Prices Tab of Prospect Window

Managing price lists

# Prospect Quotes window

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

- The **Prospects: Quotes** window displays all quotes for all prospects.
- New quotes cannot be created using this window.
- Existing quotes cannot be deleted using this window.

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

* Code	Name	Client
Q-INTSEC000	Nulla quam.	Internet Security Technologies
Q-INTSEC000	Suspendisse posuere	Internet Security Technologies

* Name	Group of Services
Nulla quam.	DTP Tasks

## Quote Status

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

- **Blue** for unknown quote status
- **Green** for accepted quote status
- **Red** for rejected quote status
- **Purple** for received or corrected quote status

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

See also:

[Prospect Window](#)

[Quotes Tab of Prospect Window](#)

[Creating/Editing Client/Prospect Quotes](#)

# Prospect Jobs window

All jobs for former or inactive prospects stored in the database are listed in the **Prospect Jobs** window. The options available for this window are the same as those for the **Prospect Jobs** tab of the **Prospect** window. The major difference is that the **Prospect Jobs** window displays all prospect jobs of all former or inactive prospects.

Prospect Jobs window interface showing the navigation bar with the **Prospect Jobs** tab highlighted. Below the navigation bar, there are filter dropdowns for Status, Invoiced, and Project Manager, all set to **\*All\***. The table below shows the list of prospect jobs:

* Code	Job Name	Project	Assigned	Deadline	Completed	Group of Services
J-INTSECO	SSH technology	SSH technology	05.05.2015 00:00	17.05.2015 18:00	15.05.2015 18:00	Editing
J-INTSECO	Training Schedule	Training Schedule	28.04.2015 00:00	20.05.2015 18:00	Heads-up	Editing

## Filters

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

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

The **Project Manager** filter drop-down list allows you to view only jobs managed by a particular *Project Manager*.

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

## Prospect Job statuses

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

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

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

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

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

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

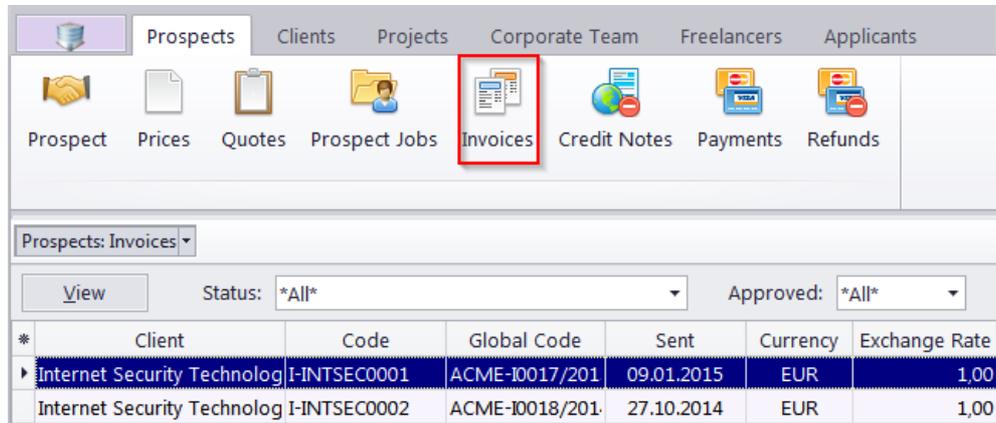
See also:

Prospect Window

Prospect Jobs Tab of Prospect Window

# Prospect Invoices window

The **Invoices to Prospects** window displays a general overview of all invoices, issued to all former or inactive clients in the database. It can be used to identify currently unpaid invoices and obtain a total of balance due according to all invoices issued. The options available for this window are the same as those for the **Invoices** tab of the **Prospect** window. The major difference is that the **Invoices to Prospects** window displays all invoices for all former or inactive clients.



* Client	Code	Global Code	Sent	Currency	Exchange Rate
Internet Security Technolog	I-INTSEC0001	ACME-10017/201	09.01.2015	EUR	1,00
Internet Security Technolog	I-INTSEC0002	ACME-10018/201	27.10.2014	EUR	1,00

## Filters

Use the **Status** filter drop-down list to display only invoices a specific status.

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

## Invoice Status

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

- **Green** — the invoice is Outstanding and is expected to be paid soon.
- **Blue** — the invoice is Outstanding and is expected to be paid today.
- **Red** — the invoice is Outstanding and its payment is overdue.
- **Black** — the invoice has been Settled (paid).

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

See also:

Prospect Window

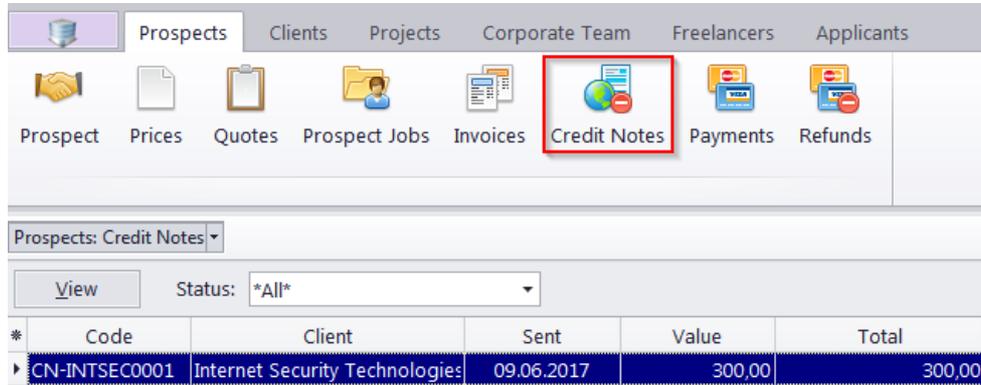
Invoices Tab of Prospect Window

# Prospect Credit Notes window

The options available for this window are the same as those **Credit Notes** tab of **Prospect** window.

The major difference is that **Credit Notes to Prospects** window displays all credit notes to all former or inactive clients.

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



* Code	Client	Sent	Value	Total
CN-INTSEC0001	Internet Security Technologies	09.06.2017	300,00	300,00

---

See also:

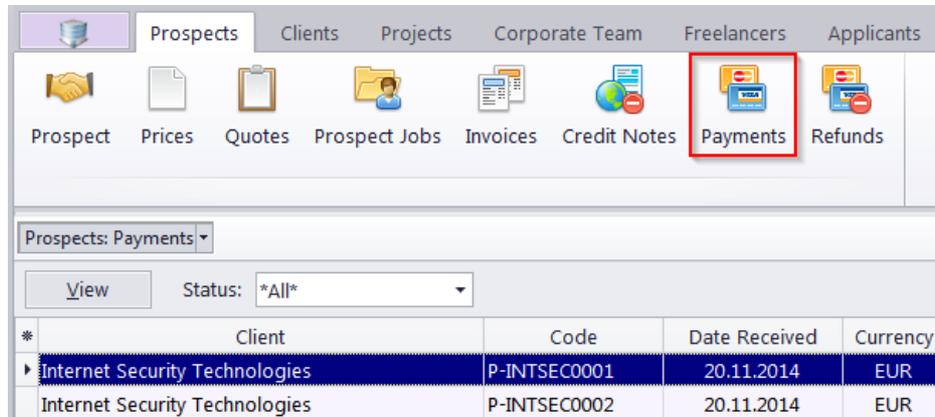
Prospect Window

Credit Notes Tab of Prospect Window

# Prospect Payments window

The **Prospects: Payments** window displays all payments from all former or inactive clients in one table. This window can be used to obtain total values of money transfers received from former or inactive clients.

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



* Client	Code	Date Received	Currency
Internet Security Technologies	P-INTSEC0001	20.11.2014	EUR
Internet Security Technologies	P-INTSEC0002	20.11.2014	EUR

---

See also:

[Prospect Window](#)

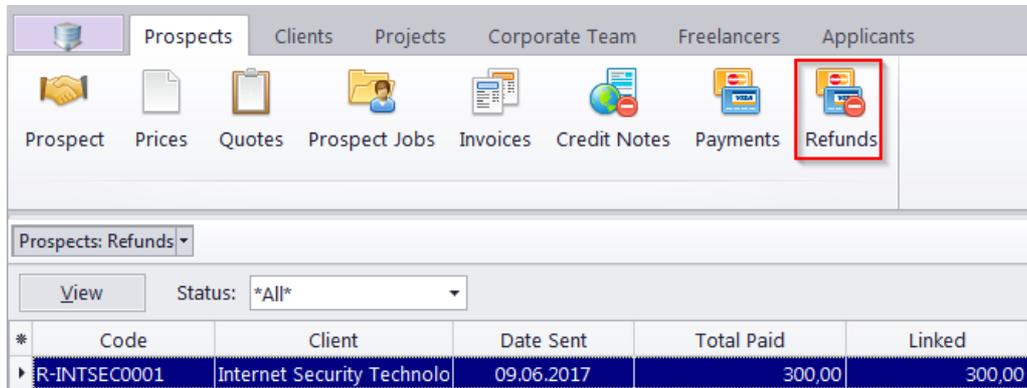
[Payments Tab of Prospect Window](#)

# Prospect Refunds window

The options available for this window are the same as those in the **Refunds** tab of the **Prospect** window.

The major difference is that the **Prospects: Refunds** window displays all refunds to all former or inactive clients.

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



* Code	Client	Date Sent	Total Paid	Linked
R-INTSEC0001	Internet Security Technolo	09.06.2017	300,00	300,00

---

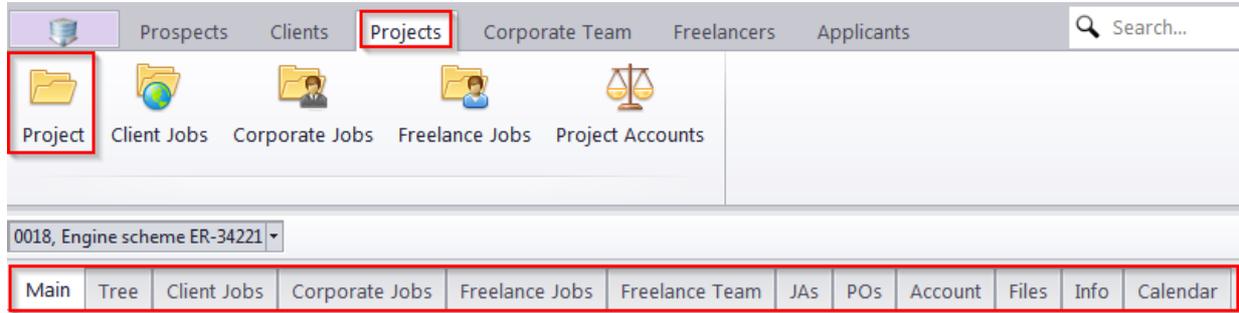
See also:

[Prospect Window](#)

[Refunds Tab of Prospect Window](#)

# Project Window

The **Project** window can be used to view, edit and enter new information about your projects, as well as to create and manage client and *expert* jobs, purchase orders, job assignments and project files.



## Project Window tabs

Different tabs of the **Project** window represent different aspects and elements of the projects stored in the Projex database. Project data is broken into the following **Project** window tabs:

- The **Main** tab — provides the most basic overview of your projects. Projects are created and marked as completed here. This tab also contains project profiles.
- The **Tree** tab — provides schematic view of project jobs and expert assignments structure. Here client and expert jobs can be created and experts can be assigned.
- The **Client Jobs** tab — gives an overview of client jobs of a project. Client jobs can be edited here as well.
- The **Corporate Jobs** tab — gives an overview of jobs assigned to corporate experts. Corporate jobs can be edited and experts can be assigned to these jobs here.
- The **Freelance Jobs** tab — gives an overview of jobs assigned to freelancers. Freelance jobs can be edited and freelancers can be assigned to these jobs here.
- The **Freelance Team** tab — provides freelancer search options. With the help of this tab the required freelancers can be and grouped for the selected project.
- The **JAs** tab — used for issuing and managing job assignments (JAs) for corporate experts.
- The **POs** tab — used for issuing and managing purchase orders (POs) for freelancers.
- The **Account** tab — provides a basic overview of the financial account of a selected project.
- The **Files** tab — provides quick access to the project folder of a selected project, as well as to other files related to this project.
- The **Info** tab — this tab is used for creating various project-related notes.
- The **Calendar** tab — a schematic overview of project jobs, presented in the form of a calendar.

---

See also:

Workspace Icons

# Project Window Main Tab

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

When deleting a project, you will be prompted to enter the project's number to confirm your deletion request.

To create a project based on the data of an existing project, use the **Clone** button.

The screenshot shows the Project Window Main Tab. On the left, there is a project list table with columns for Code, Name, and Client. The project '0034 Norby workshop' is selected and highlighted in blue. Below the table are navigation controls and a status filter set to '\*All\*'. On the right, the Project Profile panel is open for '0034 Norby workshop'. It displays the following information:

- Name: Norby workshop
- Client: The Lightning Graphics
- Client Product Line: Main: Bartholomeo Rodrigues
- Client PM: Lane Ellis Annan
- Corporate PM: Fernando Lucena
- Timeline: Assigned: 17.11.2014 00:00 (935 days ago); Deadline: 03.12.2014 18:00 (919 days ago); Completed: 03.12.2014 18:00 (919 days ago)
- Project Folder: D:\Business\Projects\0034 Fernando Lucena Norby workshop
- Based on Quote: -
- General Information: (empty text area)

## Project List

To search for a project by its name, or any other data visible in the table, type the string being searched for into the **Find Panel** over the main list.

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

Information displayed in the project list can be configured. Use the **Customize columns** option to add or remove columns (Deadline, PM and so on).

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

Each project can have a flag assigned to it. A project's flag can be changed by right-clicking it and selecting a flag.

**Note:** Due to user access restrictions, some filter operations (like the local custom filter and the global date filter) or page settings, you may not be able to see all the clients in the database.

## Project Status

Records in project list are marked by color according to the project's status:

**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.

**Black** — the project is completed.

**Orange background** — *On Hold* status

**Green background** — *Heads-Up* status

**Grey background** — *Canceled* status

**Note:** You can change the status colors on the **Colors: Status** tab of the **User Settings**.

## Project Profile

A **Project Code** is automatically assigned to each project in Projetex. All project codes are unique and cannot be edited.

**Name** — a project's name can be up to 150 characters long.

**Client Product Line** — this button can be used to assign a project to a different product line of the client. The current product line name and the list of responsible product line project managers is displayed next to the **Client Product Line** button.

**Client PM** — one of the client's contacts, responsible for this project on the client side. The person selected here will be set as the default client's PM for all new client jobs of this project.

**Corporate PM** — one of the company's project managers, responsible for this project on the corporate side. The person selected here will be set as the default corporate PM for all new client jobs of this project.

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

**Special Status** — these are used when a project needs to be put *on hold*, *canceled* or when you create a *heads-up* (or potential) project. Projects with *on hold* status have their deadlines undetermined, thus *on hold projects* cannot become overdue. Projects with the *heads-up* status cannot be set as completed, since the *heads-up* status assumes that work has not yet started. *Canceled* projects also can not be set as completed, since the status assumes that the project was abandoned.

**Based on Quote** — projects created from quotes will have the quote code displayed here.

**General Information** — a project's profile can contain any general information relevant to this project, as a plain text note.

## Custom Fields

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

## Audit

The **Audit** tab keeps track of who edited the project profile and when.

---

See also:

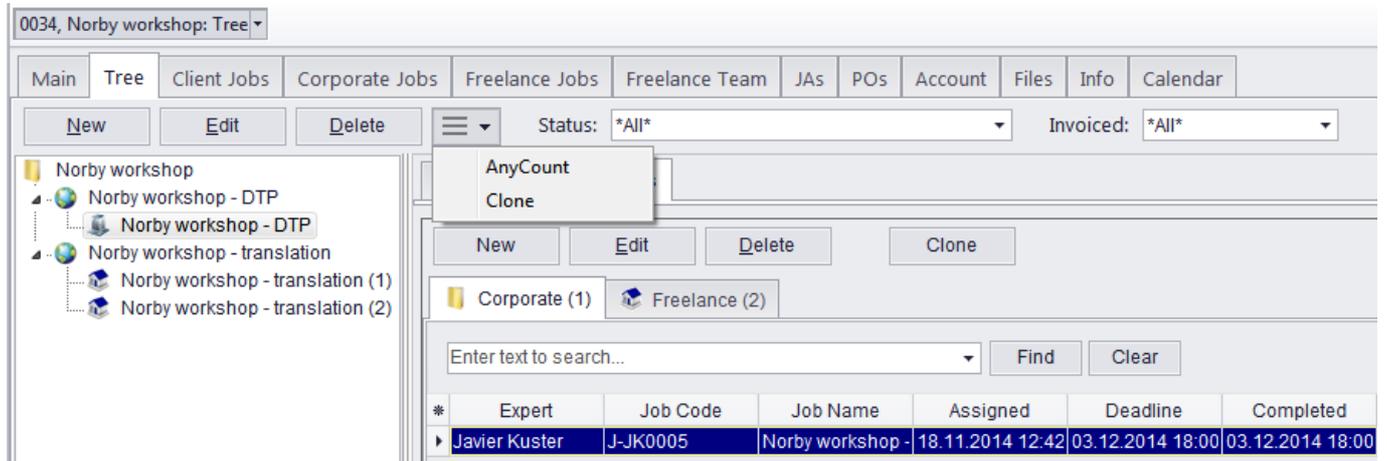
[Project Window](#)

[Creating a project](#)

# Project Window Tree Tab

The **Tree** tab manages the job structure of projects and consists of the following parts:

- The *tree scheme* of the current project (in the left part of the tab), which represents the structure of the project;
- The *job tables*, which are displayed to the right.



## The Tree Scheme

Projects in Projetex can contain three types of jobs:

- **Client jobs** — jobs which your company has to do for the client. These are the jobs which has been quoted to client and which the client has purchased. These jobs can be included into your invoices to client.
- **Corporate jobs** — jobs being done by corporate (in-house) experts, employed by your agency.
- **Freelance jobs** — jobs, subcontracted to freelance experts (or any other vendors). These jobs will be included into your purchase orders to freelancers.

Corporate and freelance jobs icons with question marks ( ? ) indicate that no expert has yet been assigned to these jobs.

A project is broken down into *client jobs*, which in turn can be split into a number of *corporate jobs* and *freelance jobs*. All these jobs can be created, edited and deleted in one window, using the **Client Jobs** and **Expert Jobs** tabs to the right of Tree view field. Clicking any of the jobs in the project tree view will highlight its data in the tables to the right.

## Client Job Buttons

The **New Client Job** button can be used to add another *client job* to the current project.

The **Edit** button will open the currently selected *client job* for editing.

The **Delete** button will delete the currently selected *client job*.

The **Clone** button will create a copy of the selected *client job* (without any expert jobs in it).

The **AnyCount** button will run the AnyCount text count engine which will count the files you choose, and create a new *client job* based on the count results.

## Expert Job Tab Buttons

The **New** button can be used to add another *corporate job* (if the **Corporate** tab is open) or *freelance job* (if the **Freelance** tab is open) to the current project.

The **Edit** button will open the currently selected *corporate* or *freelance job* for editing.

The **Delete** button will delete the currently selected *corporate* or *freelance job*.

The **Clone** button will create a copy of the selected *corporate* or *freelance job*. The cloned expert job will have no expert assigned to it.

---

See also:

Project Window

Creating client jobs

Creating corporate jobs

Creating freelance jobs

# Project Window Client Jobs Tab

The **Client Jobs** tab lists all the client jobs within the currently selected project. Client jobs can be created, edited and deleted here.

0034, Norby workshop: Client Jobs ▾											
Main	Tree	Client Jobs	Corporate Jobs	Freelance Jobs	Freelance Team	JAs	POs	Account	Files	Info	Calendar
New		Edit		Delete		Status: *All*		Invoiced: *All*			
* Code	Job Name	Project	Assigned	Deadline	Completed	Group of Services					
J-LIGRA00	Norby workshop - trans	Norby workshop	17.11.2014 00:00	03.12.2014 18:00	03.12.2014 18:00	Editing					
J-LIGRA00	Norby workshop - DTP	Norby workshop	17.11.2014 00:00	03.12.2014 18:00	03.12.2014 18:00	Translation					

## Filters

Use the **Status** filter drop-down list to display only jobs with a specific status (*completed, not completed, overdue, etc.*).

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

## Client Job Statuses

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

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

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

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

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

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

---

See also:

Project Window

Client Jobs window

Creating client jobs

# Project Window Corporate Jobs Tab

The **Corporate Jobs** tab of the **Project** window lists all corporate jobs of the currently selected project.

Corporate jobs can be created, edited and deleted here. When creating a new corporate job, you will be prompted to select a Client job within the project to assign it to.

* Code	Name	Expert	Assigned	Deadline
J-JK0005	Norby workshop - DTP	Javier Kuster	18.11.2014 12:42	03.12.2014 18:00

## Filters

Use the **Status** filter drop-down list to display only jobs with a specific status (*completed*, *not completed*, *overdue*, etc.).

Using the **JA Issued** filter drop-down list you can select to display only *corporate jobs* with or without an issued Job Assignment.

## Corporate Job Statuses

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

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

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

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

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

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

---

See also:

[Project Window](#)

[Corporate Jobs Window](#)

[Creating corporate jobs](#)

# Project Window Freelance Jobs Tab

The **Freelance Jobs** tab of the **Project** window lists all freelance jobs of the currently selected project.

Freelance jobs can be created, edited and deleted here. When creating a new freelance job, you will be prompted to select a Client job within the project to assign it to.

* Expert	Job Code	Job Name	Assigned	Deadline	Completed
Jose Fernandez	J-JF0005	Norby workshop - translation (1)	18.11.2014 12:43	03.12.2014 18:00	03.12.2014 18:00
Jose Fernandez	J-JF0009	Norby workshop - translation (2)	18.11.2014 12:43	03.12.2014 18:00	03.12.2014 18:00

## Filters

Use the **Status** filter drop-down list to display only jobs with a specific status (*completed*, *not completed*, *overdue*, etc.).

Using the **PO Issued** filter drop-down list you can select to display only *corporate jobs* with or without an issued Purchase Order.

## Freelance Job Statuses

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

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

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

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

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

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

See also:

[Project Window](#)

[Freelance Jobs Window](#)

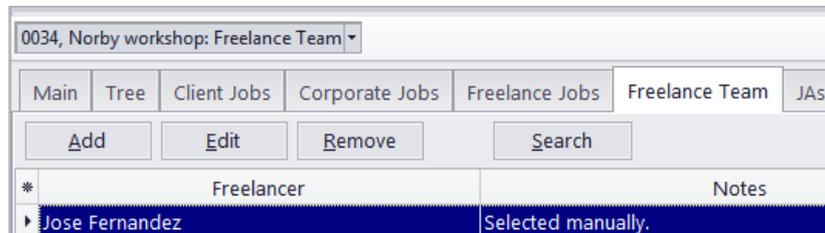
[Freelance Team Tab](#)

[Creating freelance jobs](#)

# Project Window Freelance Team Tab

A *freelance team* is a group of freelancers with skills and prices acceptable for a certain project. The purpose of creating a freelance team tab is to help project managers save time on searching the entire database each time they assign an expert. With the help of the Freelance Team tab, suitable freelancer candidates can be selected and defined for each project. You can select a freelance expert for a job either from the general list or from the freelance team list set for the project (if the project has a freelance team).

The **Freelance Team** tab of the **Project** window displays all the freelancers selected for the current project.



## Freelance Team Buttons

The **Add** button will open the **Freelancer Chooser** window, displaying all the freelance experts in the database.

□

The **Edit** button can be used to add or edit notes for any member of the current freelance team.

The **Remove** button will remove the currently selected freelancer from the freelance team.

The **Search** button allows to search for a freelance expert by his or her *language pairs* (translation services), *prices* or *completed jobs* (see Searching for freelancers for more details).

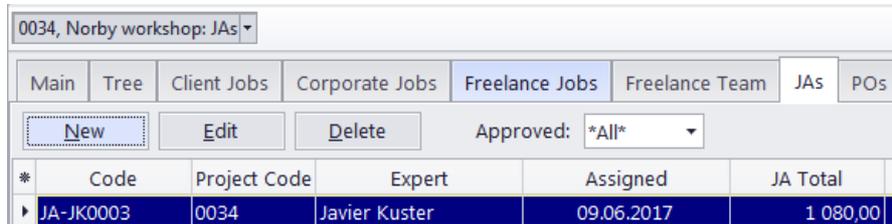
---

See also:

Project Window

# Project Window JAs Tab

The **JAs** tab of the **Project** window contains the list of *job assignments (JA)* to in-house experts within the currently selected project. Assigning an expert to a corporate job does not automatically create job assignment. Using this tab, project managers can create job assignments to corporate (in-house) experts. A job assignment is a request for the expert to begin working on a certain job or jobs.



* Code	Project Code	Expert	Assigned	JA Total
JA-JK0003	0034	Javier Kuster	09.06.2017	1 080,00

The **New** button will open the **New JA** window, which can be used to add a job assignment to any unassigned corporate job within the current project.

The **Edit** button will open the currently selected JA for editing.

The **Delete** button will delete the currently selected job assignment.

Use the **Approved** drop-down list to filter out only those **JAs** which have or have not been approved by *project managers*.

---

See also:

Project Window

Creating Job Assignments

# Project Window POs Tab

The **POs** tab of the **Project** window is the only area where *purchase orders (PO)* to your freelancers can be created or deleted. A purchase order (or a PO) is a printable document, which includes a number of freelance jobs with their respective prices, discounts, markups and taxes. A purchase order to freelancer can include only jobs assigned to this freelancer.

* PO Code	Global PO Code	Date Sent	Expert Name	Project Code	Project Name
PO-JF0005	ACME-I0053/2014	04.12.2014	Jose Fernandez	0034	Norby workshop

## Purchase Order Filters

Use the **Status** drop-down list to filter out only those *purchase orders* which have the selected status.

Use the **Approved** drop-down list to filter out those *POs* which have or have not been approved by *project managers*.

## Purchase Order Statuses

Purchase order statuses change depending on your payment terms to freelancers and the linking of the payments to the purchase orders. POs in the list are shown in different colors. These are determined by the current status of each purchase order:

- **Green** — the purchase order is *outstanding* and is expected *to be paid soon*.
- **Blue** — the purchase order is *outstanding* and is expected *to be paid today*.
- **Red** — the purchase order is *outstanding* and its *payment is overdue*.
- **Pink** — the purchase order is *not invoiced*.
- **Black** — the purchase order has been *settled* (paid).

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

Projex automatically assigns and updates statuses of POs depending on the **Payment Terms** of the Freelancer.

---

See also:

[Project Window](#)

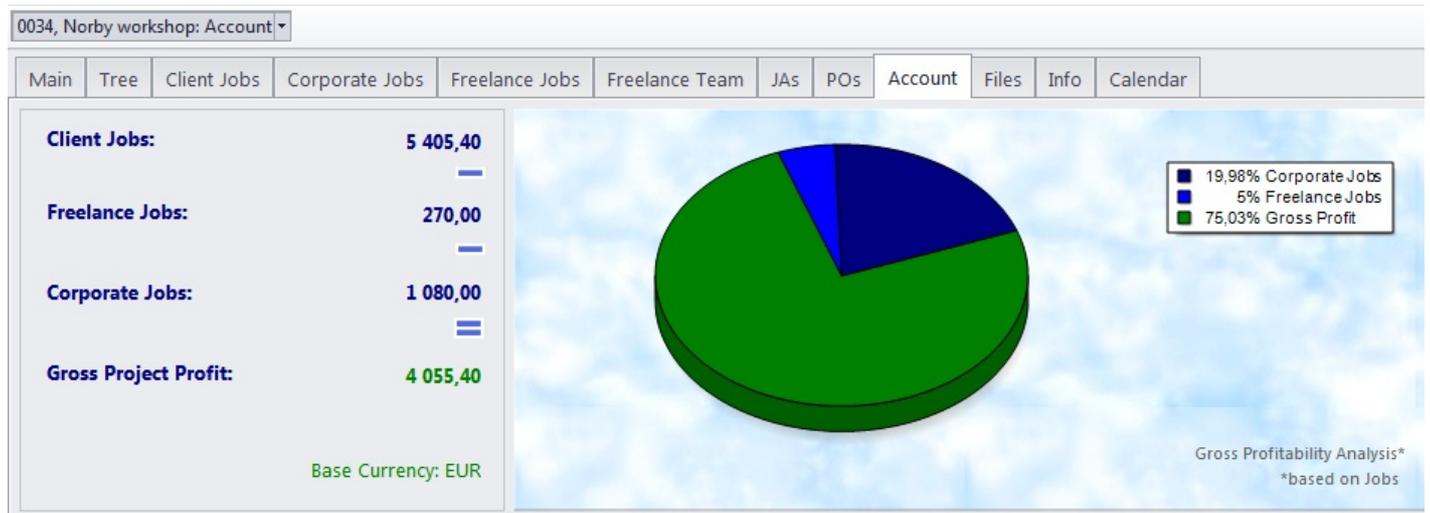
[Creating Purchase Orders](#)

# Project Window Account Tab

Aggregated financial totals, as well as the most basic performance measurement and analysis, can be viewed on the **Balance** tab of the **Project** window.

The following information is available:

- **Client Jobs** — the total value of a project's expert jobs (accounts receivable).
- **Freelance Jobs** — the total value of project's freelance jobs (accounts payable).
- **Corporate Jobs** — the total cost of project's corporate jobs based on average hourly cost (*AHC*) of in-house experts and total time spent per job (accounts payable).
- **Gross Project Profit** — the total value of expert jobs of the currently selected project, minus the total value of the project's freelance jobs and corporate jobs.
- The **Gross Profitability Analysis** diagram displays a pie chart, comparing the volumes of the project's corporate jobs, freelance jobs and gross profit.



See also:

[Project Window](#)

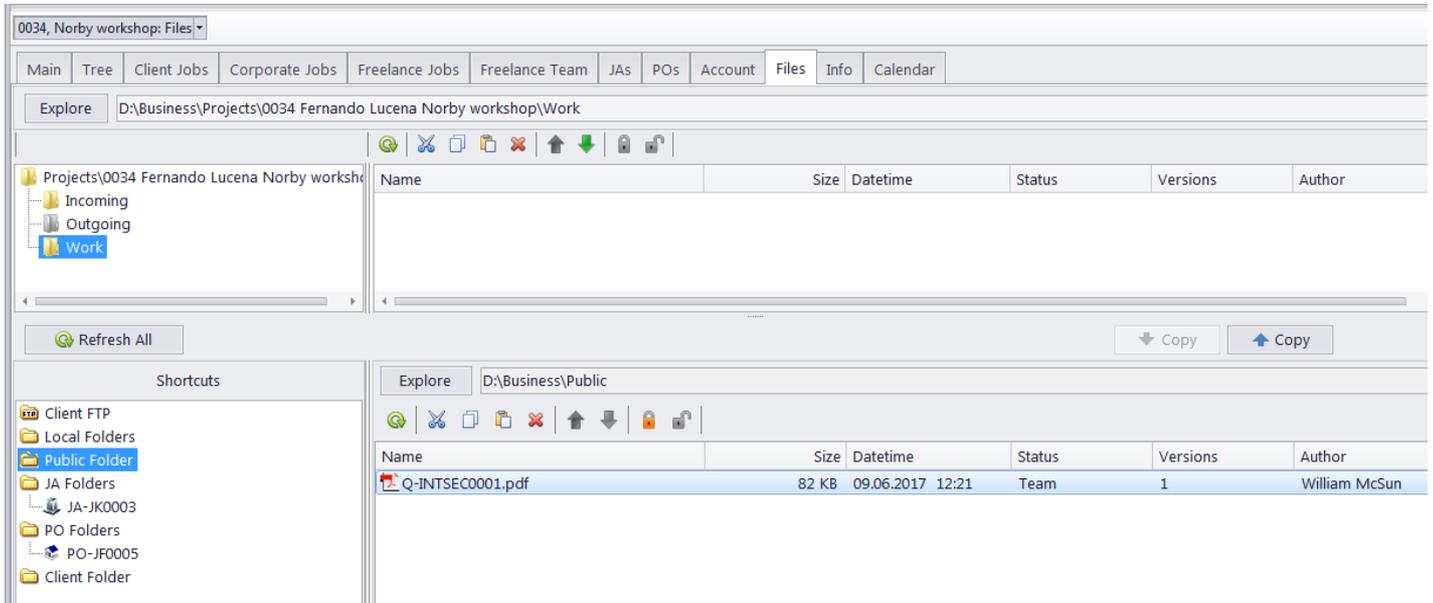
[Project Accounts Window](#)

# Project Window Files Tab

The **Files** tab of the **Project** window manages the files and folders related to this project.

This particular **Files** tab covers the following areas:

- The *Project folder*.
- The *JA folders* of the current project. If any job assignments have been created within this project, they will be displayed in the field to the right.
- The *PO folders* of the current project. If any purchase orders have been created within this project, they will be displayed in the field to the right.
- The *Client folder* of this project's client.
- The *FTP connections* of this project's client.



The main file manager window consists of two horizontal panes. The upper pane shows the project folder and the content of the currently selected sub-folder. The lower pane allows to open shortcuts. Clicking any of the **Shortcuts** options will create a second file view field to the right, and open the appropriate folder there. This allows to simultaneously work with two opened folders in the same window.

Files can be exchanged between the project folder and existing **Shortcuts** using the two **Copy** buttons.

- **↑ Copy** - is used to copy files from the path currently opened in the **Shortcuts** pane to the project folder.
- **↓ Copy** - is used to copy files from the project folder to the path currently opened in the **Shortcuts** pane.

The context menu contains the following specific file operations:

The **Open** command opens the file in appropriate application

The **Upload** command uploads the file from the local *Business* folder to the *BusinessServer* folder on the Projctex Server Administrator PC.

The **Download** command downloads the file from the *BusinessServer* folder on the Projctex Server Administrator PC to the *Business* folder on the Workstation PC.

The **Download version** opens window that contains information about all versions of particular files.

Each file can have one of the following statuses:

- Team** - the files stored in the *BusinessServer* folder on the server and in local storage are identical.
- Team - Changed on Workstation** - the local copy of the file has been modified, the file on the server has not been updated.
- Team - Changed on Server** - the file on the server has been modified, the local copy has not been updated.
- Team - Missing** - the file exists on the server, but has not been downloaded to the local PC yet (or has been deleted locally).
- Local** - the file exists locally, but has not been uploaded to the server yet (or has been deleted on the server).

See also:

Project Window

Working with files in Projctex

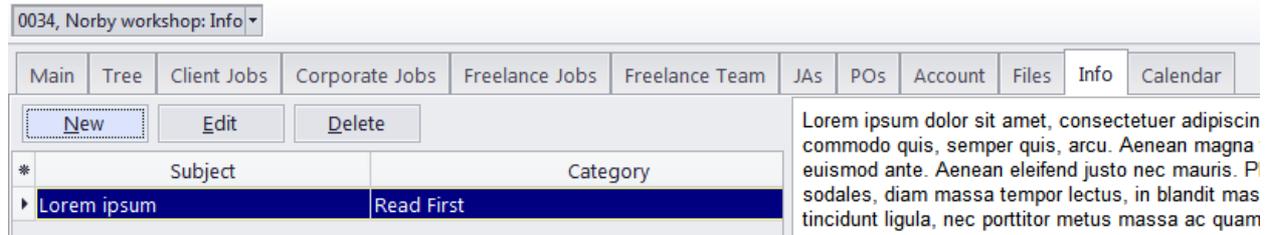
# Project Window Info Tab

The **Info** tab of the **Project** window can be used to enter any optional additional information regarding the selected project in plain text format. These notes will be available to all project manager users.

Each note consists of the following elements:

- **Subject** — maximum 100 characters long.
- **Category** — new note categories can be added with the help of the **Corporate Settings >> Categories** menu in the **Backstage** view.
- **Information** — a plain text note with no maximum length.

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



---

See also:

[Project Window](#)

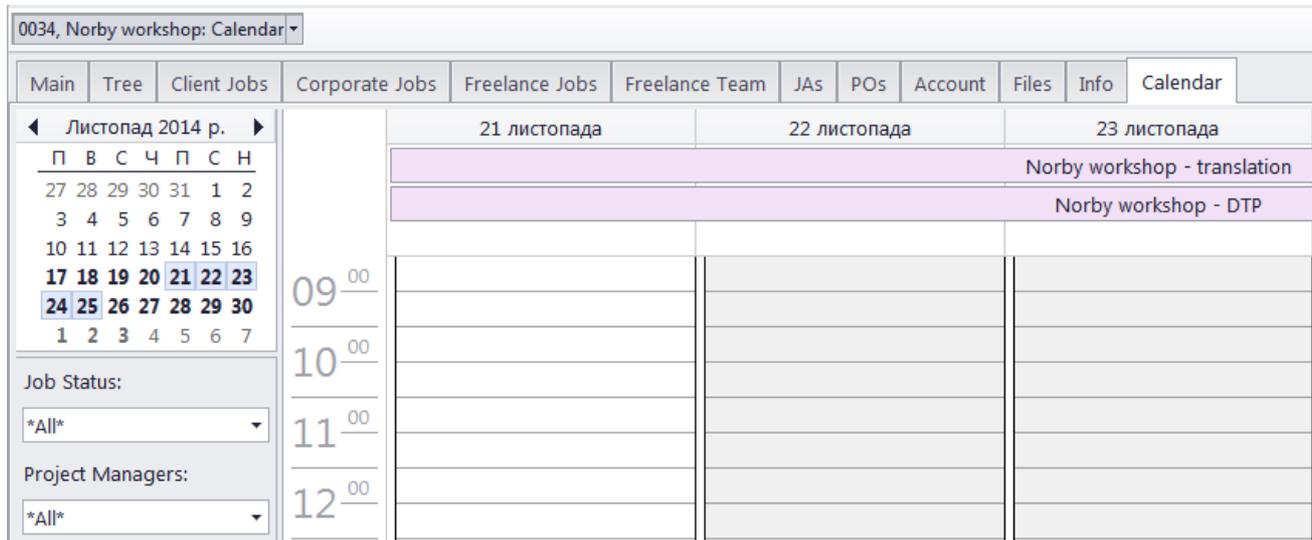
[Categories](#)

# Project Window Calendar Tab

The **Calendar** tab of the **Project** window displays the duration of the selected project's *client jobs*.

Each job block stretches across the calendar from assignment until completion, or until the deadline if the job has not been completed yet.

Double-click any block to open the **Edit Client Job** window for that job.



## Settings for the Calendar view

The following settings for the calendar page are available:

**Viewed period** - the Ribbon displays icons for selecting the time interval to be viewed and moving backward and forward interval by interval.

**Mini-calendar** - the mini-calendar on the left displays the month and date currently viewed. Click a date to switch to it. To move to a different month, click the greyed-out dates, the Back and Forwards buttons in the month header, or the header itself. Click a day and drag to view all the days you drag across.

## Calendar colors

Like the jobs they represent, the client job calendar bars can have different colors, depending on the statuses of the corresponding jobs:

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

**Blue** — the job is *not completed* and *due today*.

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

**Grey** — the job is *anceled*.

**Pale Pink** — the job is *completed*.

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

**Pale Orange** — the job is *On Hold*.

## Filtering the Calendar

Use the **Job Status filter** to display only jobs with a certain Status.

Use the **Project Manager filter** to display only the jobs belonging to a project led by a specific *Project Manager*.

---

See also:

Project Window

The Calendar

# Corporate Jobs Window

All corporate jobs stored in the database are listed in the **Corporate Jobs** window. The options available for this window are the same as those for the **Corporate Jobs** tab of the **Corporate Team** or **Project** window. The major differences are:

- The **Corporate Jobs** window displays all corporate jobs of all projects/corporate experts.
- New corporate jobs cannot be created using this window.
- Existing corporate jobs cannot be deleted using this window.

* Code	Name	Expert	Assigned	Deadline
J-TT0005	Conference report (proofreading) (2)	Timo Turunen	01.03.2015 11:56	12.03.2015 11:56
J-SH0005	Interface corrections	Sheryl Hirsch	19.02.2015 11:57	12.03.2015 11:57

* Code	Name	Expert	Assigned	Deadline
J-TT0001	Engine scheme ER-34221	Timo Turunen	20.04.2015 00:00	24.05.2015 18:00
J-JS0001	LS Drive - 1305m - English > Swedish	Jennie Schofield	19.11.2014 00:00	19.11.2014 18:00

## Filters

The **Status** drop-down list allows you to select to view only jobs with a particular status: *completed*, *not completed*, *overdue* and so on.

The **JA Issued** filter drop-down list you can select to display only those corporate jobs which have or have not been included into job assignments to in-house experts.

The **Project Manager** filter drop-down list allows you to select to view only the jobs managed by a particular Project Manager.

## Corporate Job Statuses

The color of the corporate jobs in the list is determined by their status. By default these are:

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

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

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

- **Orange background** — *On Hold* status
- **Green background** — *Heads-Up* status

- Grey background — *Canceled* status

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

---

See also:

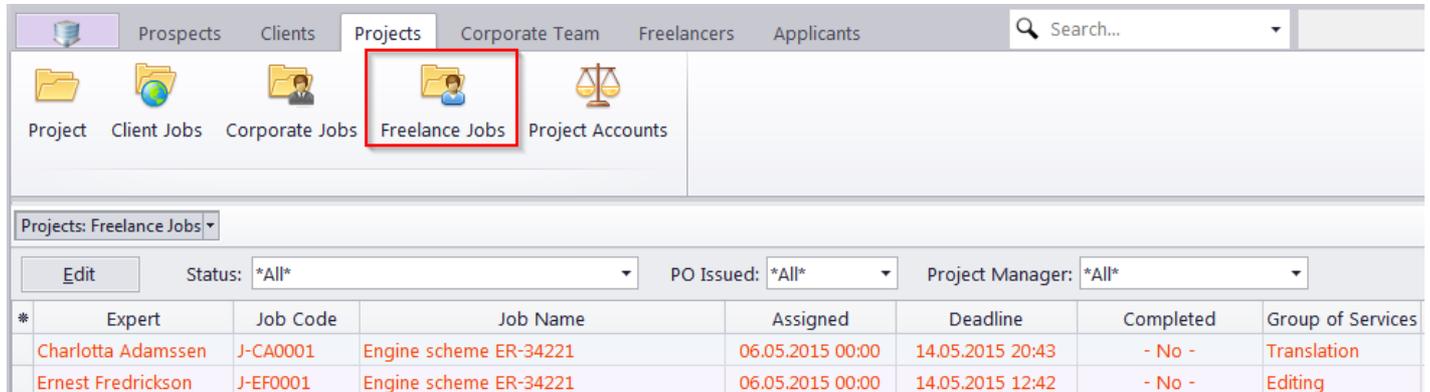
Corporate Jobs Tab of Project Window

Corporate Jobs Tab of Corporate Expert Window

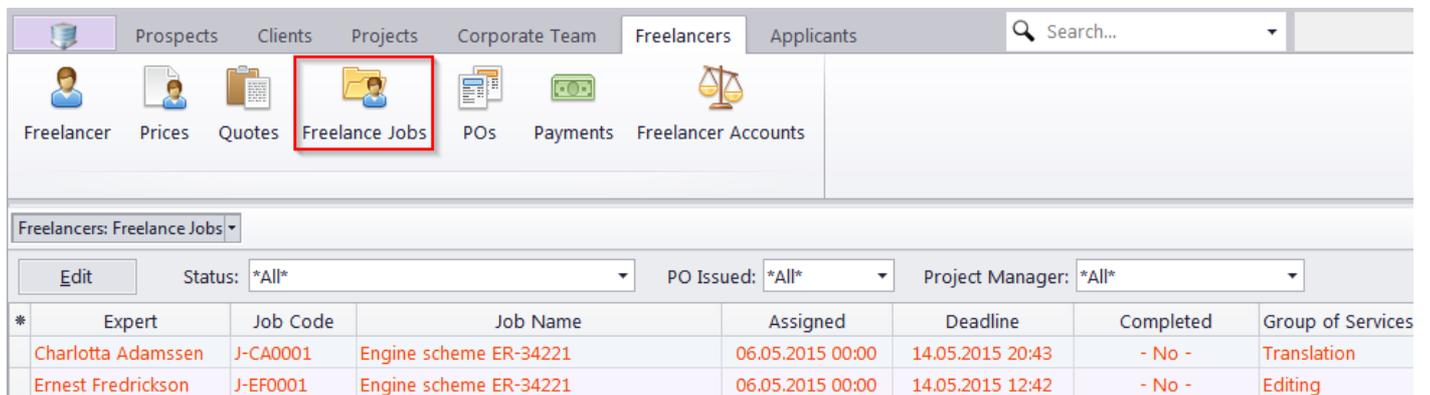
# Freelance Jobs Window

All *freelance jobs* stored in the database are listed in the **Freelance Jobs** window. The options available for this window are the same as those for the **Freelance Jobs** tab of the **Project** or **Freelancer** windows. The major differences are:

- The **Freelance Jobs** window displays all Freelance jobs of all projects/freelancers.
- New freelance jobs cannot be created using this window.
- Existing freelance jobs cannot be deleted using this window.



* Expert	Job Code	Job Name	Assigned	Deadline	Completed	Group of Services
Charlotta Adamssen	J-CA0001	Engine scheme ER-34221	06.05.2015 00:00	14.05.2015 20:43	- No -	Translation
Ernest Fredrickson	J-EF0001	Engine scheme ER-34221	06.05.2015 00:00	14.05.2015 12:42	- No -	Editing



* Expert	Job Code	Job Name	Assigned	Deadline	Completed	Group of Services
Charlotta Adamssen	J-CA0001	Engine scheme ER-34221	06.05.2015 00:00	14.05.2015 20:43	- No -	Translation
Ernest Fredrickson	J-EF0001	Engine scheme ER-34221	06.05.2015 00:00	14.05.2015 12:42	- No -	Editing

## Filters

Use the **Status** filter drop-down list to display only *completed*, *not completed*, or *overdue* freelance jobs.

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

The **Project Manager** filter drop-down list allows you to select to view only jobs managed by a particular Project Manager.

## Freelance Job Statuses

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

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

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

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

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

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

See also:

Freelance Jobs Tab of Project Window



# Project Accounts Window

The **Project Accounts** window provides a profitability overview of all the projects in database.

Gross Profit is calculated by deducting *corporate jobs* totals (based on average hourly costs and time spent) and *freelance jobs* totals from *client jobs* totals. Operating profit is calculated by deducting *corporate expenses* from *gross profit*. For each individual project, its balance and gross profit percentage is calculated instead. This does not include discounts and markups from invoices and POs, allowing to determine the abstract project profitability.

The **Comparative Gross Profitability Analysis** diagram displays how profitable each project is in comparison with the rest of the projects.

Using the **Project Manager** drop-down list you can select to view only the projects of a certain project manager, giving you a quick overview of this manager's performance.

The screenshot shows the 'Project Accounts' window with the following components:

- Navigation Bar:** Includes tabs for Prospects, Clients, Projects, Corporate Team, Freelancers, and Applicants. A search bar and utility icons are on the right.
- Project Manager:** A dropdown menu set to '\*All\*'.
- Summary Panel:**
  - Client Jobs:** 212 576,37
  - Freelance Jobs:** 41 314,54
  - Corporate Jobs:** 13 984,63
  - Gross Profit:** 157 277,20
  - Corporate Expenses:** 6 546,16
  - Operating Profit:** 150 731,04
  - Base Currency: EUR
- Comparative Gross Profitability Analysis:** A bar chart comparing 'Current Project' (83.74%) and 'All Projects' (73.99%).
- Table:**

* Client Name	Project Code	Project Name	Assigned	Completed	Client Jobs	Freelance Jobs	Corporate Job	Project Balance
Definition Designs	0018	Engine scheme ER-34221	02.04.2015	- No -	4 641,75	1 492,57	6 880,00	-3 710,82
The Lightning Graphics	0019	Marketing booklet	22.05.2014	20.11.2014	4 859,47	600,00	190,00	4 069,47

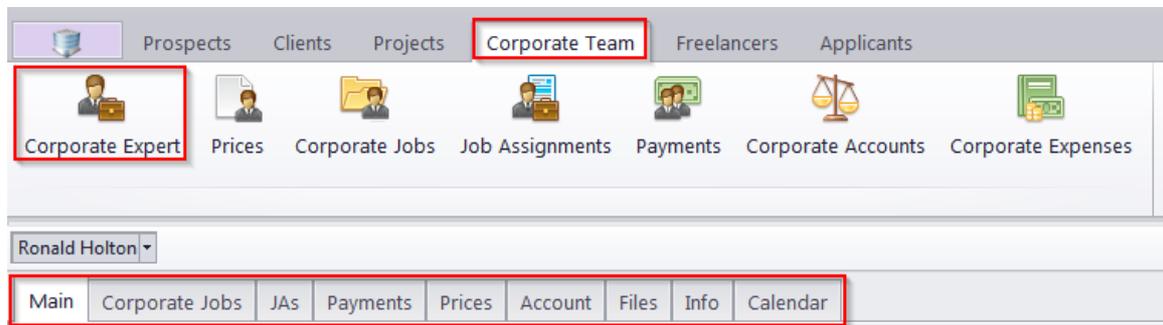
See also:

Account Tab of Project Window

# Corporate Expert Window

The **Corporate Expert** window can be used to view, edit and enter new information about your in-house (corporate) experts, as well as to manage *corporate jobs*, *job assignments* and the *files* of *corporate experts*.

To open the **Corporate Expert** window click the **Corporate Expert** icon from the **Corporate Team** tab of the Ribbon.



## Corporate Expert Window tabs

Different tabs of the corporate expert window represent different data, relevant to specific corporate experts. Corporate expert data is broken into the following tabs:

The **Main** tab — contains the list of your corporate experts and their profiles.

The **Corporate Jobs** tab — gives an overview of corporate jobs assigned to the selected corporate expert.

The **JAs** tab — is used for managing job assignments (*JAs*) for the selected corporate expert.

The **Payments** tab — holds information on payments made to the currently selected corporate expert.

The **Prices** tab — is used to create, edit and check the personal price list of the currently selected corporate expert.

The **Account** tab — provides a basic overview of the selected expert's financial account.

The **Files** tab — provides quick access to the selected corporate expert's folder, as well as to other files related to this expert.

The **Info** tab — this tab is used for various notes related to the selected corporate expert.

The **Calendar** tab — gives a schematic overview of the corporate jobs assigned to the current corporate expert.

---

See also:

Workspace Icons

# Corporate Expert Window Main Tab

Profiles of all corporate experts in the database can be viewed and managed through the **Main** tab of the **Corporate Expert** window.

## Browsing corporate experts

You can search for specific experts using the  Enter a few characters from the expert's name, or any other column displayed in the table, and the table will show only the entries that contain the characters.

Select any expert in the list to view the expert's profile to the right.

Once a new expert has been added, their data can be edited in the expert profile.

Each expert can have a flag assigned to him/her. An expert's flag can be changed by right-clicking the entry and choosing the flag.

Experts are listed in table form. You can change the columns displayed in the table by using the **Customize Columns** option.

The screenshot shows the 'Main' tab of the 'Corporate Expert' window. At the top, there's a dropdown menu for the selected expert, 'Ronald Holton'. Below it are tabs for 'Main', 'Corporate Jobs', 'JAS', 'Payments', 'Prices', 'Account', 'Files', 'Info', and 'Calendar'. The 'Main' tab contains a search bar and a table of experts. The table has columns for Name, Currency, AHC, E-Mail, and Phone. The row for 'Ronald Holton' is selected. To the right of the table is the 'Expert Profile' tab, which shows details for Ronald Holton: Expert Code (RH), Name (Ronald Holton), Contact Info (E-mail: Ronald@projetex.com, Ronald@catcount.com, Phone: +32 278 9789789), Next Codes, AHC (24,00), Expert Currency (EUR), and Expert Folder (D:\Business\Experts\Corporate\RH). There are also buttons for 'New Corporate Expert', 'Delete', 'Find', 'Clear', 'Expert Profile', 'Custom Fields', 'Audit', 'General Information', 'Stats', 'Levels', and 'Edit'.

Name	Currency	AHC	E-Mail	Phone
Allison Laven	EUR	15,00	Allison@projetex.com	
Javier Kuster	EUR	18,00	Javier@projetex.com	+32 278 9809123
Bryon Ortolano	EUR	23,00	Bryon@projetex.com	+32 227 8799233
Alvaro Wigren	EUR	25,00	Alvaro@projetex.com	+32 245 4879789
Ronald Holton	EUR	24,00	Ronald@projetex.com	+32 278 9789789
Jennie Schofield	EUR	22,00	Jennie@projetex.com	+32 279 3234566
Latoya Pittman	EUR	19,00	Latoya@projetex.com	+32 243 5890435
Timo Turunen	EUR	16,00	Timo@projetex.com	
Sheryl Hirsch	EUR	20,00	Sheryl@projetex.com	+32 243 2543807
Shelia Watts	EUR	25,00	watts@projetex.com	+32 278 9234234

## Expert profile

**Expert Code** — this code is used in the corporate job codes and job assignments codes of this expert. A corporate expert's code can be 15 characters long maximum.

**Name** — the corporate expert's name appears in expert chooser dialogs. This name can be a maximum of 150 characters long.

**Contact Info** — in addition to general contact details, an expert's photo can be added here. See the Corporate Expert Contact Info topic for more details.

**Next codes** — click this button to advance the automatic counters for expert-specific codes of *corporate jobs* and *job assignments*. Projetex will use these codes for the next corporate job and job assignment you create. You can only increase the next code value. See the Assign Next Expert Codes topic for more details.

Click the **AHC** button to enter/change the *Average Hourly Cost* of the selected expert. *AHC* will be used to calculate the *Total cost* of the corporate jobs performed by this expert.

**Expert currency** — select the currency of this particular expert. The expert's currency will be used in all documentation for this expert. The totals of jobs will also be indicated in the expert currency. General accounting data on experts will be presented in your *base currency*, according to the defined *exchange rates*.

**Expert Folder** — this part of the expert profile is automatically created when with a new expert profile. The location of the expert folder will depend on the **location of the Business folder**. Clicking the button on the right side of the field will open the folder in the Projetex 3D Explorer. Corporate experts will be able to access only this folder (provided proper folder access options have been set up).

**FTP Connections** — you can set parameters for access to the expert's FTP folders. Shortcuts to these folders will be automatically added to the **Files** tab of this expert's window. See the Expert FTP connections topic for more details.

**General Information** — the expert profile may contain any general information about the expert in the form of a plain text note.

**Stats** — this tab shows the corporate expert's total experience in terms of the total volume in base units (words by default) of all the expert's completed jobs. Small or large stars can be displayed, each star representing a specific number of base units, giving a graphical representation of the expert's experience.

**Levels** — in this tab, the Project manager can assign special ranks/levels to a corporate expert. The tab is a table, with each rank in it showing its assignment date, its name, and the assigning Project Manager.

## Custom fields of Corporate Experts

Use the **Custom Fields** tab, next to the **Expert Profile** tab to access the controls for any **Custom Fields of Corporate Experts**, created with the help of the Projetex Server Administrator.

## Audit

The **Audit** tab keeps track of when and by whom the selected expert's profile was created or modified.

See also:

Adding/Editing Experts and Applicants

# Corporate Expert Contact Info

The General contact information of a corporate expert contains the following fields:

- **Photo** — an image file with a maximum of 70x70 pixels. Click the frame to either **Load** a photo from a file or click **Assign from Camera** to take a picture with a camera connected to your machine. The following formats can be used: JPG, JPEG, .BMP (bitmap), .GIF (Graphics Interchange Format).
- **E-mail** (up to 2) — maximum 250 characters. The **Send** button becomes active only if a valid e-mail address is entered.
- **Phone** (up to 4) and **Fax** numbers — maximum 250 characters each.

Expert Profile Custom Fields Audit

Contact Info: E-mail: **Ronald@projetex.com,**  
**Ronald@catcount.com**  
Phone: **+32 278 9789789**

Next Codes:

Edit Corporate Expert Contact Info

Ronald Holton

Copy  
Paste  
Delete  
Load...  
Assign From Camera...  
Save As...

E-mail: Ronald@projetex.com Send

E-mail 2: Ronald@catcount.com Send

Phone: +32 278 9789789

Phone 2:

Phone 3:

Phone 4:

Fax:

OK Cancel

See also:

Main Tab of Corporate Expert Window

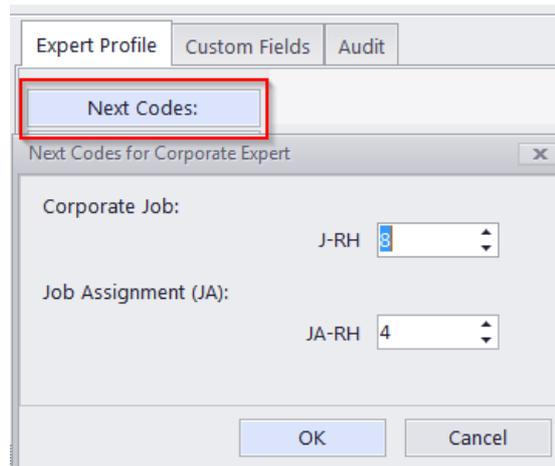
# Assign Next Expert Codes

Codes for *corporate jobs* and *job assignments* are generated automatically each time a new corporate job or job assignment is entered into the database. The prefix of these codes depends on the name of the expert. The digits after represent the counter value.

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

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

To open the **Next Codes for Corporate Expert** window, click the **Next Codes** button in this expert's profile.



---

See also:

Main Tab of Corporate Expert Window

Global Next codes

# Expert FTP connections

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

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

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

**FTP Server** — the address of the FTP server (for example ftp.server.com). Can be no longer than 50 characters. You can also specify which **Port** to use.

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

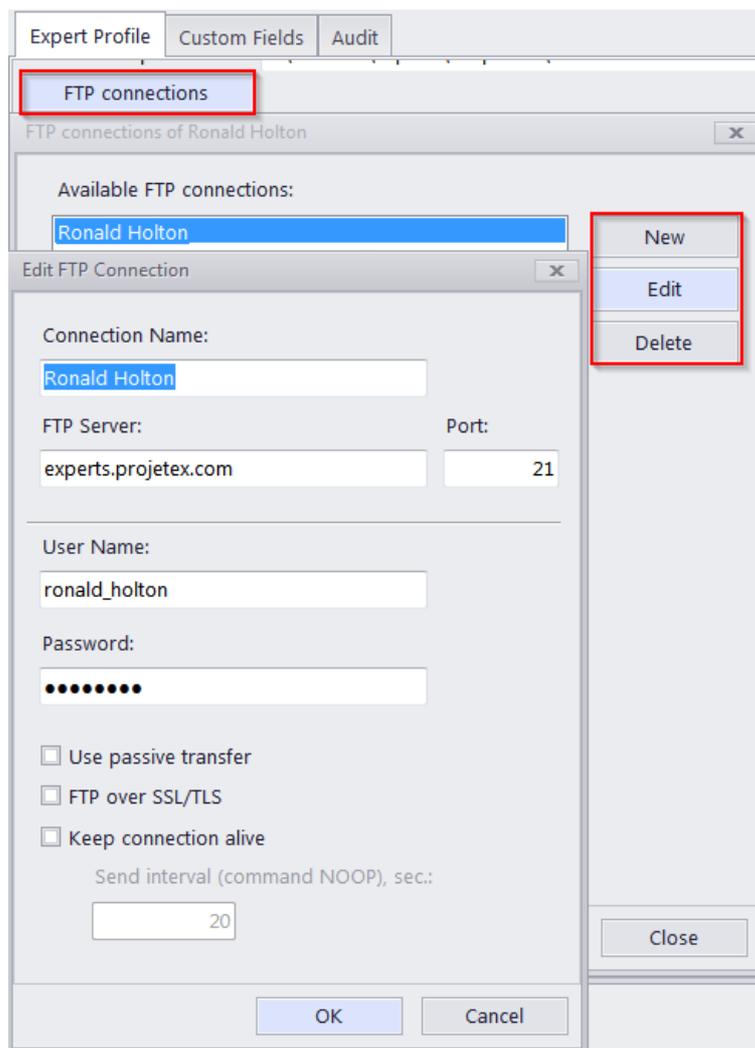
**Password** — this password will be used when Projetex attempts to connect to the FTP folder. Can be no longer than 50 characters.

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

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

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

To add, edit or delete FTP connections of a certain expert, click the **FTP Connections** button in the *expert's profile*.



See also:

Main Tab of Corporate Expert Window



# Corporate Expert Window Corporate Jobs Tab

On the **Corporate Jobs** tab you can view and edit all corporate jobs which have been assigned to the currently selected corporate expert.

* Code	Name	Expert	Assigned	Deadline
J-RH0001	Engine scheme ER-34221	Ronald Holton	06.05.2015 0:00	24.05.2015 18:00
J-RH0002	Engine scheme ER-34221	Ronald Holton	20.04.2015 0:00	14.05.2015 18:44

## Filtering corporate jobs

Use the **Status** filter drop-down list to display only *completed*, *not completed*, *overdue*, etc. corporate jobs.

Use the **JA Issued** filter drop-down list you can select to display only those corporate jobs which have or have not been included into job assignments to in-house experts.

The **Project Manager** filter drop-down list allows you to select to view only jobs managed by a particular *Project Manager*.

## Corporate Job statuses

Just like on the **Corporate Jobs** tab of the **Project** window, in the **Corporate Expert** window corporate jobs are marked with color:

- **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.
- **Black** — the job is completed.

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

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

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

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

To edit the **Job** record, select it from the list and click the **Edit** button, or double-click this job in the list.

---

See also:

[Corporate Expert Window](#)

[Corporate Jobs Window](#)

[Creating corporate jobs](#)

# Corporate Expert Window JAs Tab

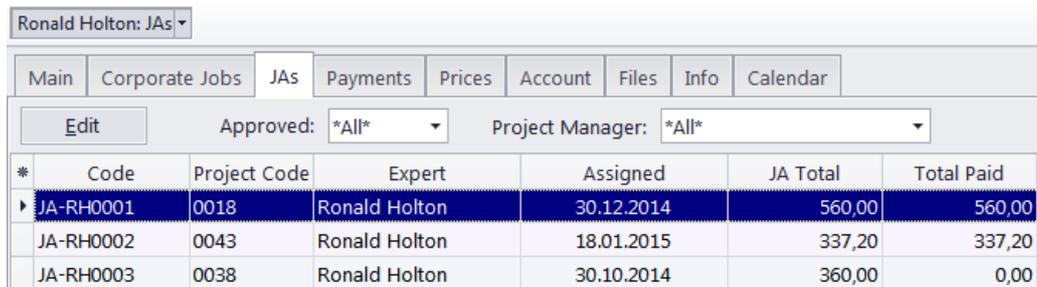
The **JAs** tab of the **Corporate Expert** window contains the list of job assignments (*JAs*), issued to the currently selected corporate expert.

JAs can be later linked with payments, after which the JA is locked and can no longer be edited.

Use the **Approved** drop-down list to filter only approved or not approved JAs.

The **Project Manager** filter drop-down list allows you to select to view only JAs for a job managed by a particular *Project Manager*.

 **Note:** JAs can be created and deleted on the **JAs** tab of the **Project** window.



The screenshot shows the 'Ronald Holton: JAs' window. It features a menu bar with 'Main', 'Corporate Jobs', 'JAs', 'Payments', 'Prices', 'Account', 'Files', 'Info', and 'Calendar'. Below the menu bar is a toolbar with an 'Edit' button, an 'Approved:' dropdown menu set to '\*All\*', and a 'Project Manager:' dropdown menu set to '\*All\*'. The main area contains a table with the following data:

* Code	Project Code	Expert	Assigned	JA Total	Total Paid
JA-RH0001	0018	Ronald Holton	30.12.2014	560,00	560,00
JA-RH0002	0043	Ronald Holton	18.01.2015	337,20	337,20
JA-RH0003	0038	Ronald Holton	30.10.2014	360,00	0,00

See also:

[Corporate Expert Window](#)

[Job Assignments Window](#)

[Creating Job Assignments](#)

# Corporate Expert Window Payments Tab

The **Payments** tab of the **Corporate Expert** window displays records of payments to the currently selected expert.

The **New** button opens the **New Corporate Expert Payment** window, where a new payment can be created.

The **Edit** button opens the **Edit Corporate Expert Payment** window, where the details of the currently selected corporate expert payment can be edited.

The **Delete** button deletes the currently selected corporate expert payment.

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

Payments to corporate experts can be linked to job assignments, fully or partially. If the sum of the linked payment values matches the *JA total*, this Job Assignment is considered "settled". Payments are also added to the company expenses on the **Account** tabs.

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

*	Expert Name	Code	Payment Date	Total Paid	Linked
	Ronald Holton	P-RH0001	02.06.2017	560,00	560,00
▶	Ronald Holton	P-RH0002	02.06.2017	337,20	337,20

---

See also:

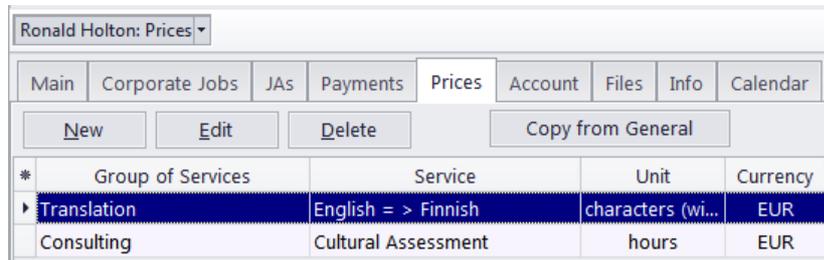
[Corporate Expert Window](#)

[Corporate Expert Payments Window](#)

[Creating Payments](#)

# Corporate Expert Window Prices Tab

In addition to their AHC, each Corporate expert in Projetex can have a set of individual prices for particular jobs. These prices can be assigned on the **Prices** tab of the **Corporate Expert** window. An individual expert's price list is maintained in the *expert's currency*. Only one price per group of services, service and unit combination can exist in the individual price-list.

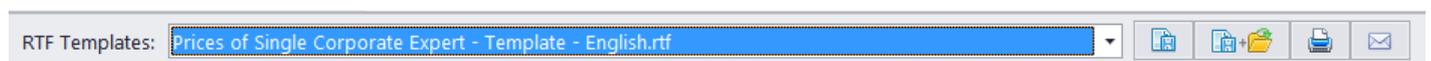


* Group of Services	Service	Unit	Currency
Translation	English = > Finnish	characters (wi...	EUR
Consulting	Cultural Assessment	hours	EUR

The **New** button opens the **New Price** window, where the details of a new price can be added.

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

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



You can print the expert's price list or save it in a text file by selecting the template and clicking the **Save**, **Save & Open** or **Print** buttons at the bottom of the **Prices** tab.

You can also click the **Send Mail** button to open the Projetex Mail Sender and send it to the expert's E-mail address as an attachment.

To configure price list templates in the **Backstage view**, click **Corporate Settings**, then click **Templates**. Templates for prices are stored in the *D:\BusinessServer\Templates\EXPERTS\CORPORATE\Prices* folder.

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

---

See also:

[Corporate Expert Window](#)

[Corporate Expert Prices Window](#)

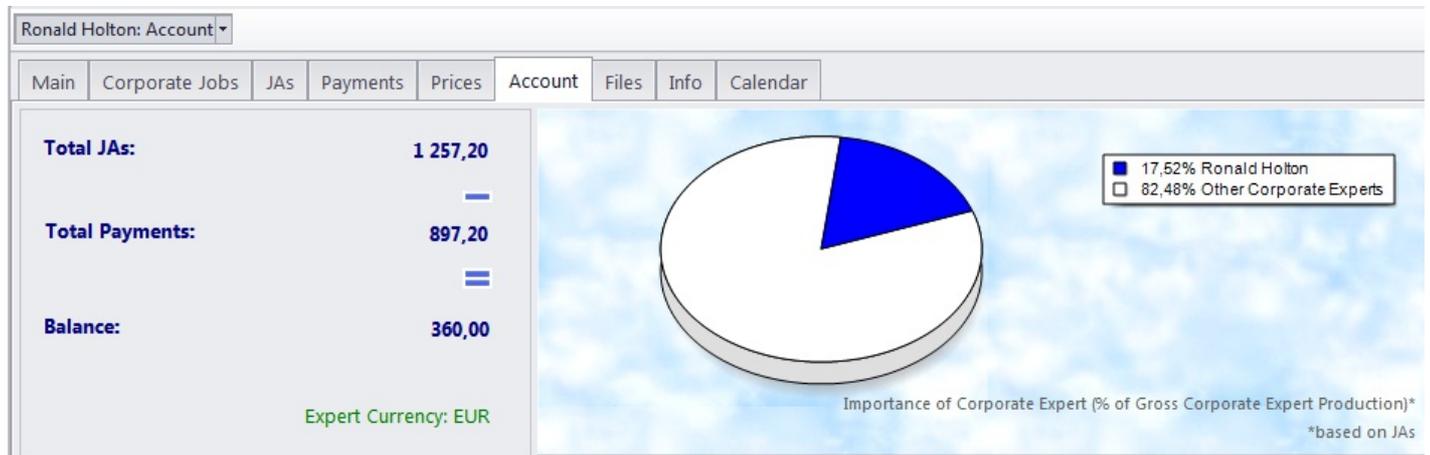
[Managing price lists](#)

# Corporate Expert Window Account Tab

The **Account** tab of the **Corporate Expert** window displays a brief summary of the selected corporate expert's accounts.

This balance includes the *total of job assignments* issued to this expert, the *total of payments* paid to this expert, and the *account balance* (total JAs minus total payments).

The pie diagram represents the share of this corporate expert in the overall number of job assignments issued to all corporate experts.



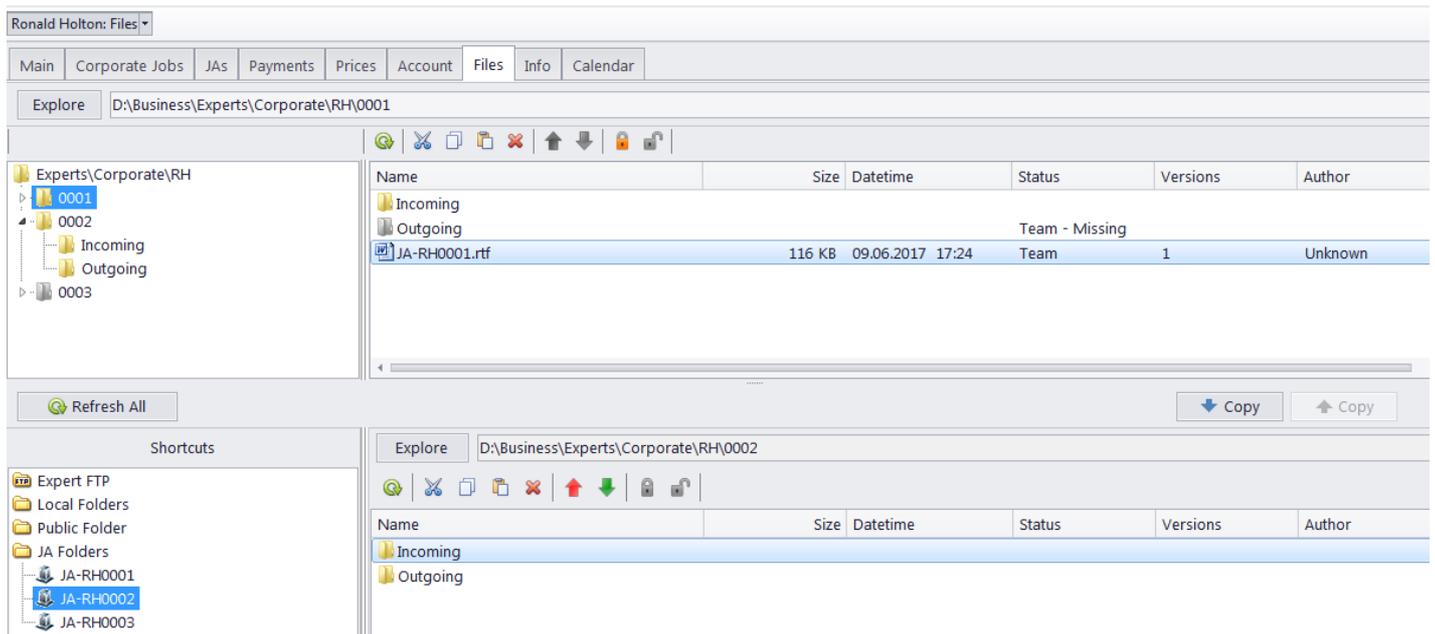
See also:

[Corporate Expert Window](#)

[Corporate Accounts Window](#)

# Corporate Expert Window Files Tab

The **Files** tab of the **Corporate Expert** window can be used to create and access the expert folder of the selected corporate expert, and work with this expert's files. Use this tab to create, view and search the work files and folders related to the selected expert (for example, you can quickly locate and access the files of a certain job assignment).



The main file manager window consists of two horizontal panes. The upper pane shows the expert folder and the content of the currently selected sub-folder. The lower pane allows to open shortcuts. Clicking any of the **Shortcuts** options will create a second file view field to the right, and open the appropriate folder there. This allows to simultaneously work with two opened folders in the same window.

Files can be exchanged between the expert folder and existing Shortcuts using the two **Copy** buttons.

 - is used to copy files from the path currently opened in the Shortcuts pane to the expert folder.

 - is used to copy files from the expert folder to the path currently opened in the Shortcuts pane.

The context menu contains the following specific file operations:

The **Open** command opens the file in appropriate application

The **Upload** command uploads the file from the local *Business* folder to the *BusinessServer* folder on the Projetex Server Administrator PC.

The **Download** command downloads the file from the *BusinessServer* folder on the Projetex Server Administrator PC to the *Business* folder on the Workstation PC.

The **Download version** opens window that contains information about all versions of particular files.

Each file can have one of the following statuses:

**Team** - the files stored in the *BusinessServer* folder on the server and in local storage are identical.

**Team - Changed on Workstation** - the local copy of the file has been modified, the file on the server has not been updated.

**Team - Changed on Server** - the file on the server has been modified, the local copy has not been updated.

**Team - Missing** - the file exists on the server, but has not been downloaded to the local PC yet (or has been deleted locally).

**Local** - the file exists locally, but has not been uploaded to the server yet (or has been deleted on the server).

See also:

Corporate Expert Window

Working with files in Projetex

# Corporate Expert Window Info Tab

The **Info** tab of the **Corporate Expert** window can be used to enter any additional information relevant to the selected corporate expert in a plain text format. These notes will be available to all project managers.

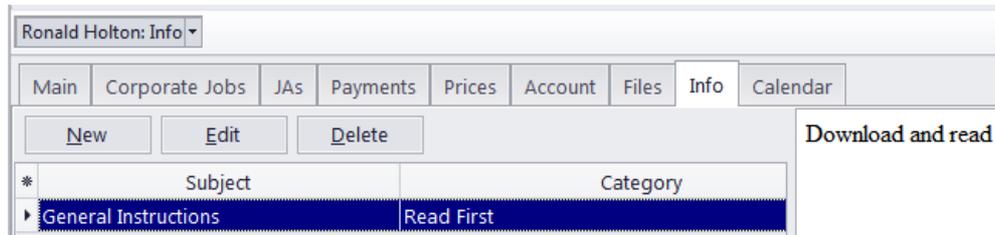
Each note can have the following attributes:

**Subject** — can be maximum 100 characters long.

**Category** — to add new note categories, in the **Backstage** view, click **Current user** command and then click **Categories**.

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

Notes can be filtered by the Subject or Category columns.



---

See also:

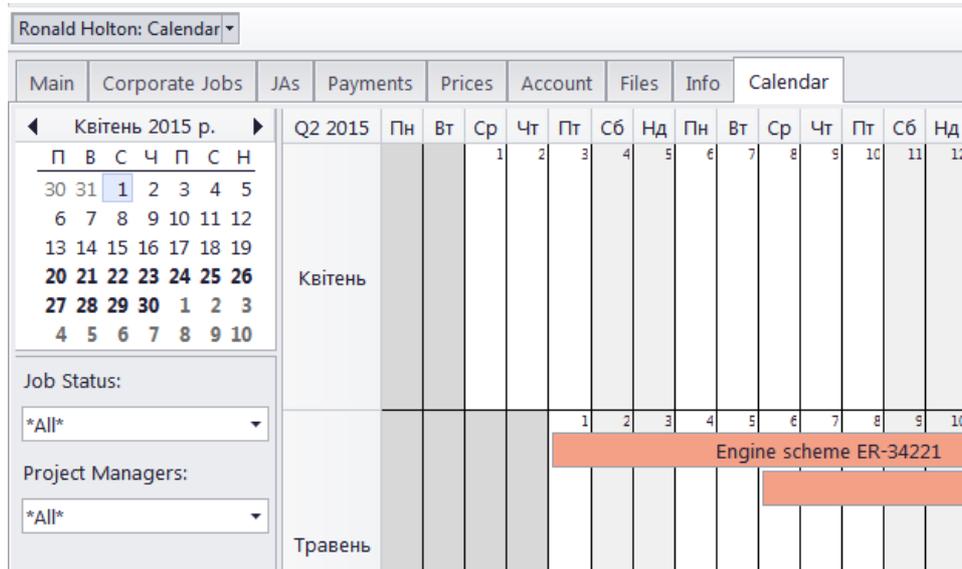
Corporate Expert Window

Categories

# Corporate Expert Window Calendar Tab

This tab provides a project manager with a visual representation of job processes of a certain corporate expert in the form of a calendar. Each job block stretches across the calendar from assignment until completion, or until deadline if the job has not been completed yet.

Double-click any *corporate job* in the calendar to open this job for editing.



## Settings for the Calendar view

The following settings for the calendar page are available:

**Viewed period** - the Ribbon displays icons for selecting the time interval to be viewed and moving backward and forward interval by interval.

**Mini-calendar** - the mini-calendar on the left displays the month and date currently viewed. Click a date to switch to it. To move to a different month, click the greyed-out dates, the Back and Forwards buttons in the month header, or the header itself. Click a day and drag to view all the days you drag across.

## Calendar colors

Like the jobs they represent, the expert job calendar bars can have different colors, depending on the statuses of the corresponding jobs:

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

**Blue** — the job is *not completed* and *due today*.

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

**Grey** — the job is *anceled*.

**Pale Pink** — the job is *completed*.

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

**Pale Orange** — the job is *On Hold*.

## Filtering the Calendar

Use the **Job Status filter** to display only jobs with a certain Status.

Use the **Project Manager filter** to display only the jobs belonging to a project led by a specific *Project Manager*.

---

See also:

Corporate Expert Window



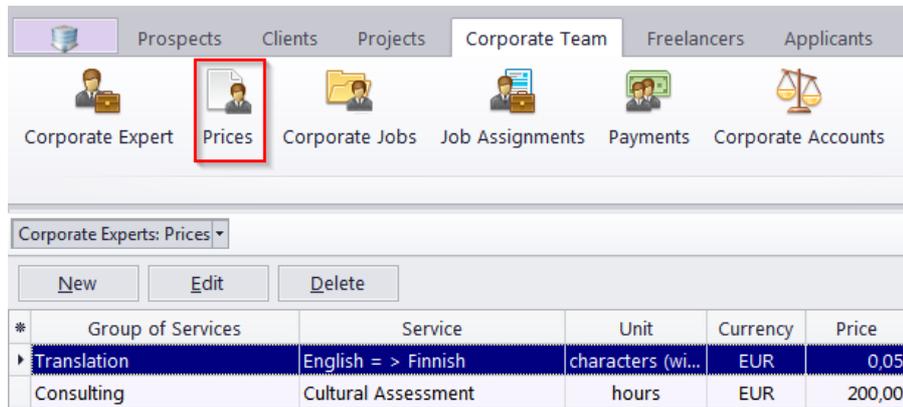
# Corporate Expert Prices Window

In addition to their AHC, corporate experts in Projetex can have a set of separate prices for particular jobs. A general list of these prices can be created in the **Prices for Corporate Experts** window. Prices in the general list can be maintained in any currency. Only one price per group of services, service and unit combination can exist in the price-list.

The **New** button opens the **New Price** window, where the details of a new price can be added.

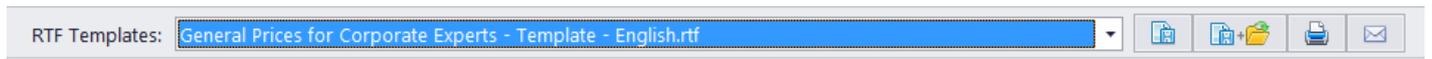
The **Edit** button opens the **Edit Price** window, where the details of the currently selected price can be edited.

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



* Group of Services	Service	Unit	Currency	Price
Translation	English = > Finnish	characters (wi...	EUR	0,05
Consulting	Cultural Assessment	hours	EUR	200,00

You can print the price list, save it in a text file, or send it via E-mail by selecting the template and clicking the **Save**, **Save & Open**, **Print**, or **Send Mail** buttons at the bottom of the **Prices for Corporate Experts** window.



To configure price list templates in the **Backstage view**, click **Corporate Settings**, then click **Templates**. Templates for prices are stored in the *D:\BusinessServer\Templates\EXPERTS\CORPORATE\Prices\* folder.

See also:

Prices Tab of Corporate Expert Window

Managing price lists

# Job Assignments Window

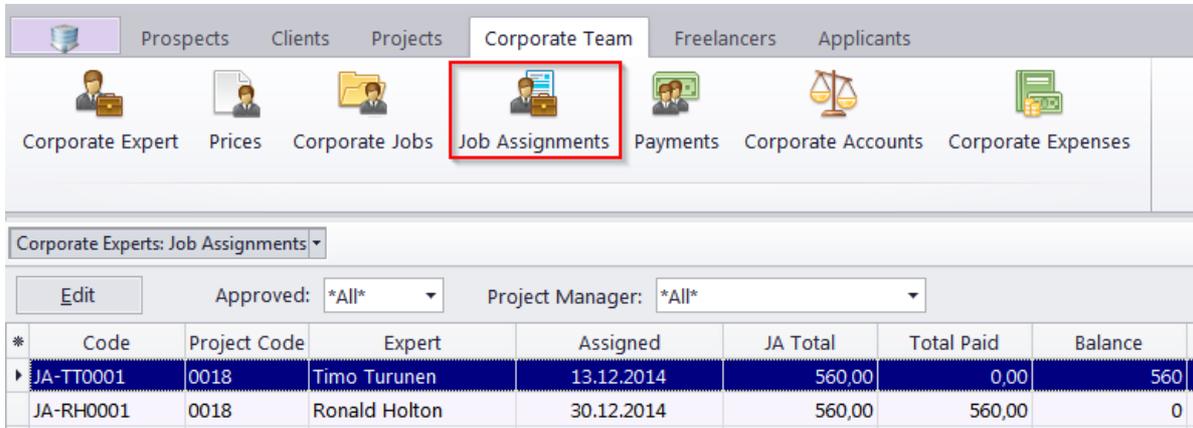
The **Job Assignments** window lists all *job assignments* issued to all of the *corporate experts*.

New JAs can not be created and existing JAs can not be deleted in this window.

Click the **Approved** drop-down list to view only JAs which were approved or not approved by project managers.

The **Project Manager** filter drop-down list allows you to select to view only JAs managed by a particular *Project Manager*.

 **Note:** JAs can be created and deleted on the JAs tab of **Project** window.



* Code	Project Code	Expert	Assigned	JA Total	Total Paid	Balance
JA-TT0001	0018	Timo Turunen	13.12.2014	560,00	0,00	560
JA-RH0001	0018	Ronald Holton	30.12.2014	560,00	560,00	0

See also:

JAs Tab of Corporate Expert Window

# Corporate Expert Payments Window

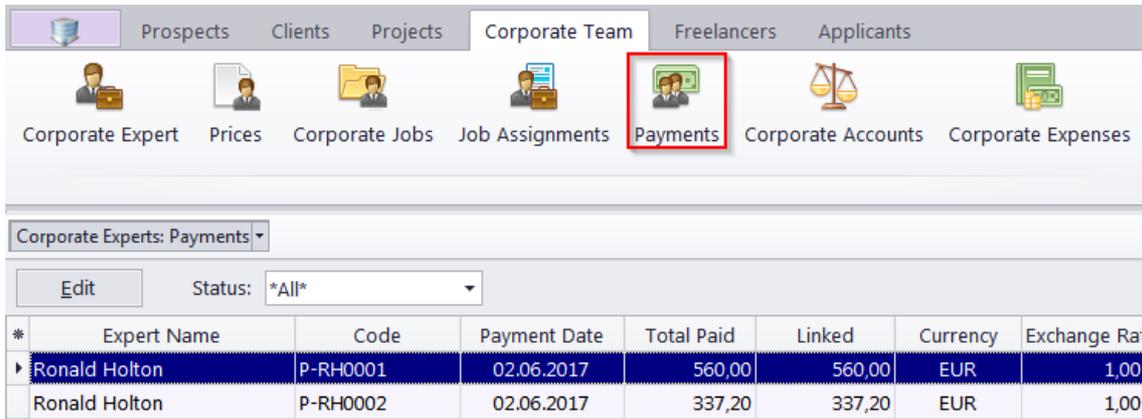
The **Corporate Experts: Payments** window displays the records of payments to all corporate experts.

New payments can not be created and existing payments can not be deleted in this window.

Payments to corporate experts can be linked to job assignments, fully or partially. If the sum of the linked payment values matches the *JA total*, this Job Assignment is considered "settled". Payments are also added to company expenses on the **Account** tabs.

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

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



* Expert Name	Code	Payment Date	Total Paid	Linked	Currency	Exchange Ra
▶ Ronald Holton	P-RH0001	02.06.2017	560,00	560,00	EUR	1,00
Ronald Holton	P-RH0002	02.06.2017	337,20	337,20	EUR	1,00

See also:

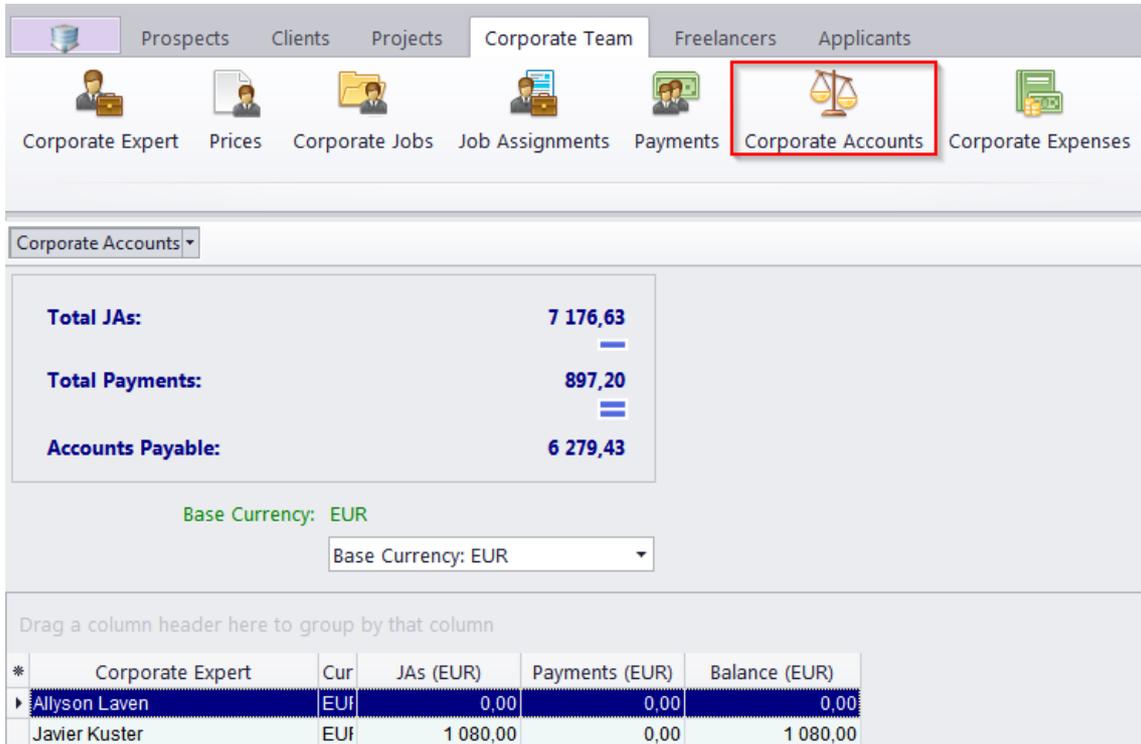
Payments Tab of Corporate Expert Window

# Corporate Accounts Window

The **Corporate Accounts** window presents a simplified balance sheet of your corporate experts, based on the payments made to them and the issued job assignments. Accounting staff can use this window to identify expert accounts which require attention. Accounts can be viewed both in experts' currencies and your base currency: use the **View** drop-down list to select a currency in which the records should be displayed.

Alternatively, you can use the **Customize columns** option to add expert currency columns to the view.

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



Corporate Accounts

**Total JAs:** 7 176,63

**Total Payments:** 897,20

**Accounts Payable:** 6 279,43

Base Currency: EUR

Base Currency: EUR

Drag a column header here to group by that column

* Corporate Expert	Cur	JAs (EUR)	Payments (EUR)	Balance (EUR)
Allyson Laven	EUR	0,00	0,00	0,00
Javier Kuster	EUR	1 080,00	0,00	1 080,00

See also:

Account Tab of Corporate Expert Window

# Corporate Expenses Window

Any *expenses*, other than *payments to freelancers and corporate experts* and the total cost of *corporate jobs*, can be entered into the database through the **Corporate Expenses** window. These expenses are used when calculating the balance of projects.

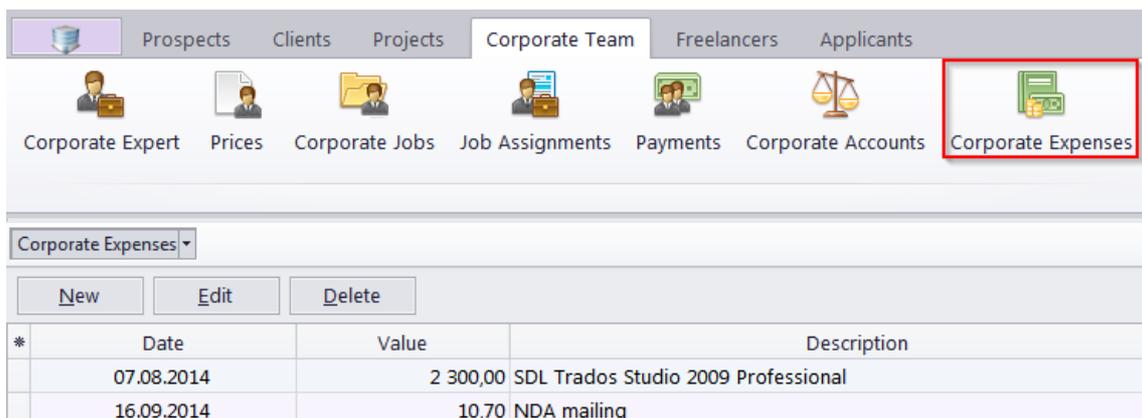
To open the **Corporate Expenses** window click on the **Corporate Expenses** icon in the **Corporate Team** section of the **Ribbon**.

Corporate expense records contain the following default fields:

**Date** - the date when the expense was handled

**Value** - value of the corporate expense

**Description** - any additional information about the expense



*	Date	Value	Description
	07.08.2014	2 300,00	SDL Trados Studio 2009 Professional
	16.09.2014	10,70	NDA mailing

---

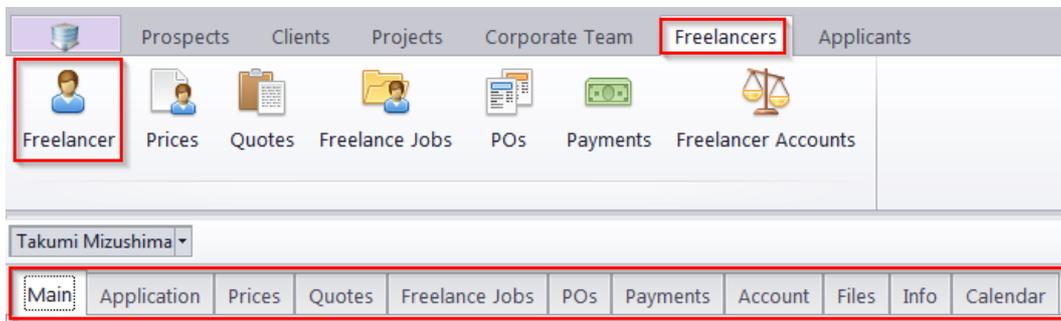
See also:

[Creating Corporate Expenses](#)

# Freelancer Window

The **Freelancer window** can be used to effectively keep track of your freelancers and their activities, update and search through your freelancer database, as well as to manage *freelance jobs*, *purchase orders* and the *files* of freelance experts.

To open the **Freelancer** window, click the **Freelancer** icon from the **Freelancers** tab of the Ribbon.



## Freelancer Window tabs

Different tabs of the **Freelancer** window represent different data, relevant to specific freelancers in your database. All freelancer data is broken into the following tabs:

The **Main** tab — contains the list of your *freelancers* and their *profiles*. Here, new freelancers can be entered into database.

The **Application** tab — contains the selected freelancer's application information, added by HR staff.

The **Prices** tab — is used to enter, edit and check the prices of the currently selected freelancer.

The **Quotes** tab — contains the quotes received from the currently selected freelancer.

The **Freelance Jobs** tab — gives an overview of the freelance jobs assigned to the selected freelancer.

The **POs** tab — is used to manage the purchase orders (POs) given to the selected freelancer.

The **Payments** tab — holds information on the payments made to the currently selected freelancer.

The **Account** tab — provides basic overview of the selected freelancer's financial account.

The **Files** tab — provides quick access to the selected freelancer's folder, as well as to other files related to this freelancer.

The **Info** tab — this tab is used to create various notes related to the selected freelance expert.

The **Calendar** tab — gives a schematic overview of the selected freelancer's jobs, presented in the form of a calendar.

---

See also:

Workspace Icons

# Freelancer Window Main Tab

The **Main** tab of the **Freelancer** window contains information on your freelance experts. You can add new freelancer records here, or edit existing ones. The two primary areas of the **Main** tab are the *freelancers list* and the *freelancer profile*.

The screenshot shows the Freelancer Window Main Tab. On the left is a table of freelancers, and on the right is the profile of the selected freelancer, Hilda Herald.

Name	Currency	Country	City
Hilda Herald	USD	United States	Miami Beach
Ernest Fredrickson	EUR	Sweden	Gothenburg
Theresa Suarez	EUR	Spain	Madrid
Emma Woodward	GBP	United Kingdom	Liverpool
Kirsi Nurmi	EUR	Finland	Turku
Pamela Lafontaine	EUR	France	Bordeaux
Thomas Geelen	EUR	Netherlands	Amsterdam
Peter Pendleton	GBP	United Kingdom	Glasgow
Stanley Crayton	EUR	United Kingdom	London
Koen Haanrath	EUR	Netherlands	Hague
Vesa Kopitello	EUR	Finland	Tampere
Charlotta Adamssen	EUR	Sweden	Uppsala
Takumi Mizushima	JPY	Japan	Kyoto
Navid Shahriar Javaid	USD	Iran	Tehran
Jose Fernandez	USD	Mexico	Chihuahua
Melissa Beaumont	EUR	France	Marseille

The profile for Hilda Herald shows the following details:

- Expert Code: HH
- Name: Hilda Herald
- Postal Address: 321 Collins Avenue, Miami Beach Florida 33139
- Contact Info: E-mail: hilda@aithelp.com, Phone: +1 305 790234
- Web: www.aithelp.com
- Payment Terms: Within 90 days (from PO issue date)
- VAT Number: (empty)
- Expert Currency: USD
- Expert Status: Active
- Freelancer Folder: D:\Business\Experts\Freelance\HH

## Browsing Freelancers

You can search for specific freelancers by using the **Find panel**. Enter a few characters from the freelancer's name, or any other column displayed in the table, and the table will show only the entries that contain the characters.

To search for freelancers by *price, service, country, or completed jobs*, click the **Search** button.

Click on any freelancer in the list to view their profile to the right.

Once a new freelancer has been added to the database, his or her profile can be edited at any time.

If you no longer actively work with a particular freelancer, you can change them into an applicant by clicking **"Move to applicants"**.

Each freelancer can have a flag assigned to him/her. A freelancer's flag can be changed by right-clicking the entry and choosing the flag.

Freelancers are listed in the form of a table. You can change the columns displayed in the table by using the **Customize Columns** option.

## Freelancer profile

The profile of the currently selected freelancer can be viewed to the right.

**Expert code** — This code will be used in document (purchase order, quote) codes of this freelancer. The expert code will also be used as the folder name of this freelancer's folder.

**Name** — Use this option to enter or edit the name of the currently selected freelancer. A freelancer's name can be no longer than 150 characters.

**Postal Address** — Here the postal address of the currently selected freelancer is stored. This information will be automatically inserted into the text of this freelancer's documents. See the Postal address of freelancer topic for more information.

**Contact info** — Click this button to enter the freelancer's contact information. See the General Contact Information of freelancer topic for more information.

**Web** — opens the **Edit Web Links** dialog box, providing fields for entering a web site address (URL), as well as the LinkedIn, Facebook, and Twitter accounts of the freelancer. Click the address or the social media icons to open the corresponding links in your Internet browser.

**Payment Terms** — You can set specific payment terms for each of your freelancers. The payment terms settings will determine when the purchase orders of this freelancer become *outstanding* and *overdue*. See the Payment Terms of Freelancer topic for more information.

**VAT number** — Regulations in some countries may require you to indicate VAT codes (or numbers) in financial documents. A freelancer's VAT number, entered in the freelancer's profile can be automatically displayed in this freelancer's printable documents.

**Expert currency** — Select the currency of this particular expert. Expert's currency will be used in all documents of this freelancer. The totals of jobs will also be indicated in the expert currency. General accounting data on experts will be presented in your *base currency*, according to the defined *exchange rates*.

**Expert Status** — Set the freelancer's availability status as Active, Inactive, or Potential.

**Next codes** — You can advance the code counters of the next *freelancer quote, freelance job, purchase order, and payment*. See the Next Codes for Freelancers topic for more information.

**Locale format** — Adjust these settings to make all documents printed for the selected freelancer use an individual locale format, specific to this freelancer. See the Locale Format of Freelancer topic for more information.

**Expert folder** — a freelancer's folder contains exported jobs, purchase orders, payments, prices and quotes of the freelancer as well as any other related files. Projetex automatically creates, updates and maintains links between freelance experts in database and their folders. A freelancer's expert code is used as the folder name. The folder is created automatically and its location in the **Business folder** is displayed in the **Expert folder** field. Click the folder button on the right side of the field to open this folder in the Projetex 3D explorer.

**FTP Connections** — here you can set the parameters for access to this freelancer's FTP folders. Shortcuts to these folders will be automatically added to the **Files** tab of this expert's window. See the [Freelancer FTP connections](#) topic for more information.

**General Information** — freelancer's profile can contain any general information relevant to this freelancer in the form of a plain text note.

## Custom Fields

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

 **Note:** Only users with access to the Projetex Server Administrator can add or remove custom fields.

## Audit

The **Audit** tab keeps track of when and by whom a freelancer profile was created or modified.

---

See also:

[Adding/Editing Experts and Applicants](#)

# Postal address of freelancer

The freelancer's postal address determines this freelancer's country of residence, and is automatically added to the purchase orders and quotes of this freelancer. The following postal address data can be added:

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

**City** — can be maximum 40 characters long.

**State** — maximum 40 characters long.

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

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

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

The screenshot displays a software interface with a list of freelancers on the left and two dialog boxes on the right. The list includes columns for Name, Currency, Country, and City. The 'Time Zone Settings' dialog box is open, showing a dropdown menu for 'Time Zone' with '(UTC-05:00) Eastern Time (US & Canada)' selected, and a 'Current date and time' field showing '12.06.2017 8:23'. The 'Edit Postal Address' dialog box is also open, showing fields for 'Street Address' (321 Collins Avenue, Miami Beach), 'City' (Miami Beach), 'State' (Florida), 'ZIP Code' (33139), and 'Country' (United States). The 'Local Time' is displayed as '12.06.2017 8:23' and the 'Time Zone' is '(UTC-05:00) Eastern Time (US\_Canada)'. The background interface shows a 'Postal Address' field with the same address details and a US flag icon.

See also:

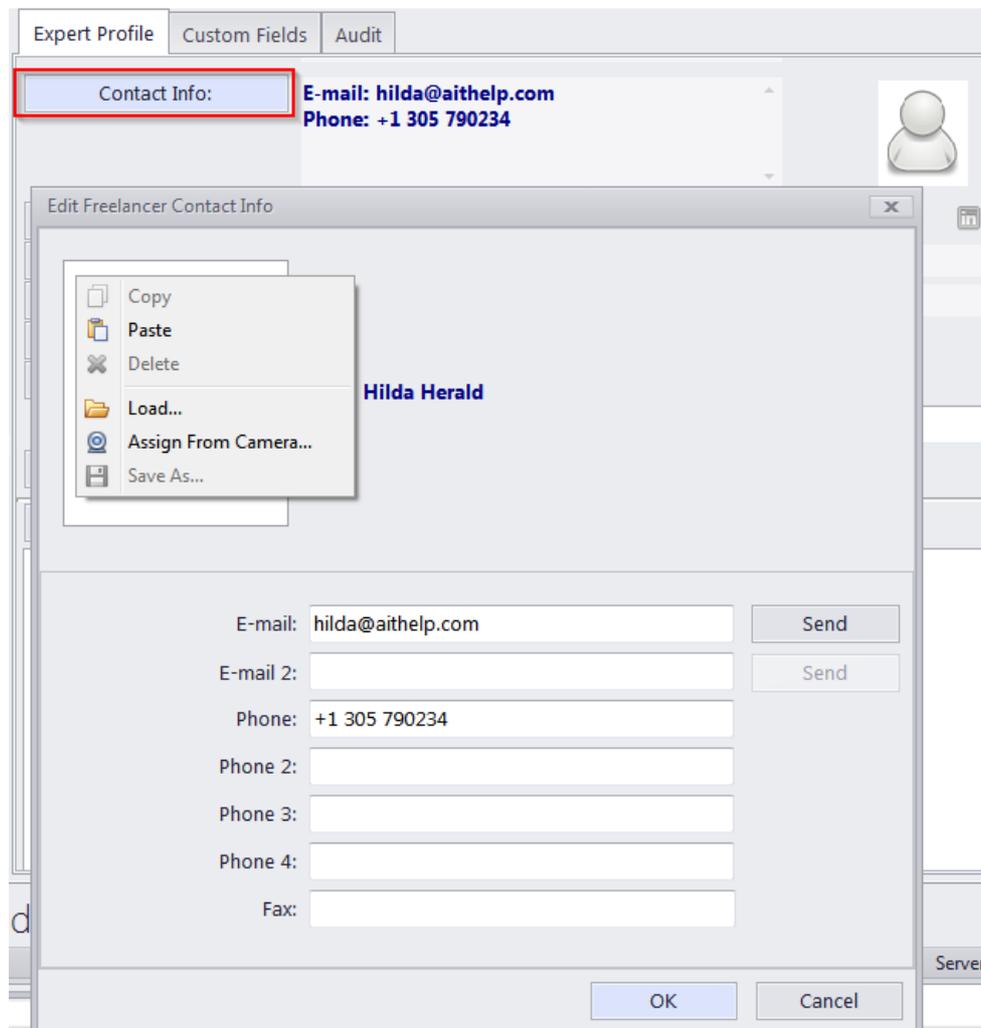
Main Tab of Freelancer Window

# General Contact Information of freelancer

**Photo** — an image file with a maximum of 70x70 pixels. Click the frame to either **Load** a photo from a file or click **Assign from Camera** to take a picture with a camera connected to your machine. The following formats can be used: JPG, JPEG, .BMP (bitmap), .GIF (Graphics Interchange Format).

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

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



See also:

Main Tab of Freelancer Window

# Payment Terms of Freelancer

According to the payment terms of a freelancer, Projetex will keep track of unpaid POs and update the status of outstanding purchase orders, making them overdue, due today, due tomorrow, and so on.

Through the **Edit Payment Terms** dialog you can configure the payment conditions of the selected freelancer, including:

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

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

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

**Additional Notes** — a plain text note with no maximum length.

Expert Profile Custom Fields Audit

Payment Terms: **Within 90 days (from PO issue date)**

Edit Payment Terms

Between: **Vitaliy Gutyk**  
and: **Hilda Herald**

Minimum Fee: 0 (0 - No Minimum Fee)

From PO issue Date

Within 90 days

On day 10 of the same month

On day 10 of the next month

On day 10 of the month following next

Unknown/Other

Additional Notes:

OK Cancel

See also:

Main Tab of Freelancer Window

# Locale Format of Freelancer

Freelancers from different countries are very likely who have different locale formats. There is no need to change your own locale format each time you print a purchase order for a freelancer with a locale format different from yours.

To have freelancer documentation printed according to their own *Regional and Language options* (normally defined in the *Windows Control Panel*), Projetex can use a separate locale format for each of your freelancers.

The following locale settings can be configured:

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

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

**No. of digits after Decimal** — Projetex will round up all numbers in documents to a number of decimals specified here. Set this parameter to 0 if the currency of a client does not have decimal units. Most commonly the number of digits after a decimal is 2.

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

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

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

**Long Date Format** — these settings configure the long format date (like *Monday, March 31, 2008*). Use four *d* characters to use the day mane, four *m* characters – for the month name and four *y* for the year.

**Note:** To use an abbreviated day or month name ("*Mon*" instead of "*Monday*" or "*Mar*" instead of "*March*") enter 3 *d* or 3 *m* characters instead of four.

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

To configure locale settings for a certain client, click the **Locale Format** button in this *freelancer's profile* and choose **Custom Values** from the **Generation of RTF files** drop-down list.

to Applicants | Expert Profile | Custom Fields\* | Audit

FTP connections | Next Codes | **Locale Format**

Clear

Locale of Emma Woodward

**Generation of RTF files:** Custom Values

Negative Currency Format: -1,1

Decimal Symbol: ,

No. of digits after Decimal: 2

Digit Grouping Symbol:

Date Separator: .

Short Date Format: dd/MM/yyyy

Long Date Format: d MMMM yyyy' p.'

**Samples:**

Positive Number: 123 456 789,00

Negative Number: -123 456 789,00

Short Date: 12.06.2017

Long Date: 12 червня 2017 р.

OK Cancel

See also:

Main Tab of Freelancer Window

# Next Codes for Freelancers

Codes of *freelancer quotes*, *freelance jobs*, *purchase orders* and *payments* are generated automatically each time a new quote, freelance job, payment or PO is entered into the database. The prefix of these codes depends on the freelancer's name. The digits represent the counter code.

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

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

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

Expert Profile Custom Fields\* Audit

FTP connections Next Codes

Next Codes for Freelancer

Quote: Q-EW 3

Job: J-EW 6

PO: PO-EW 6

Payment: P-EW 3

OK Cancel

---

See also:

Main Tab of Freelancer Window

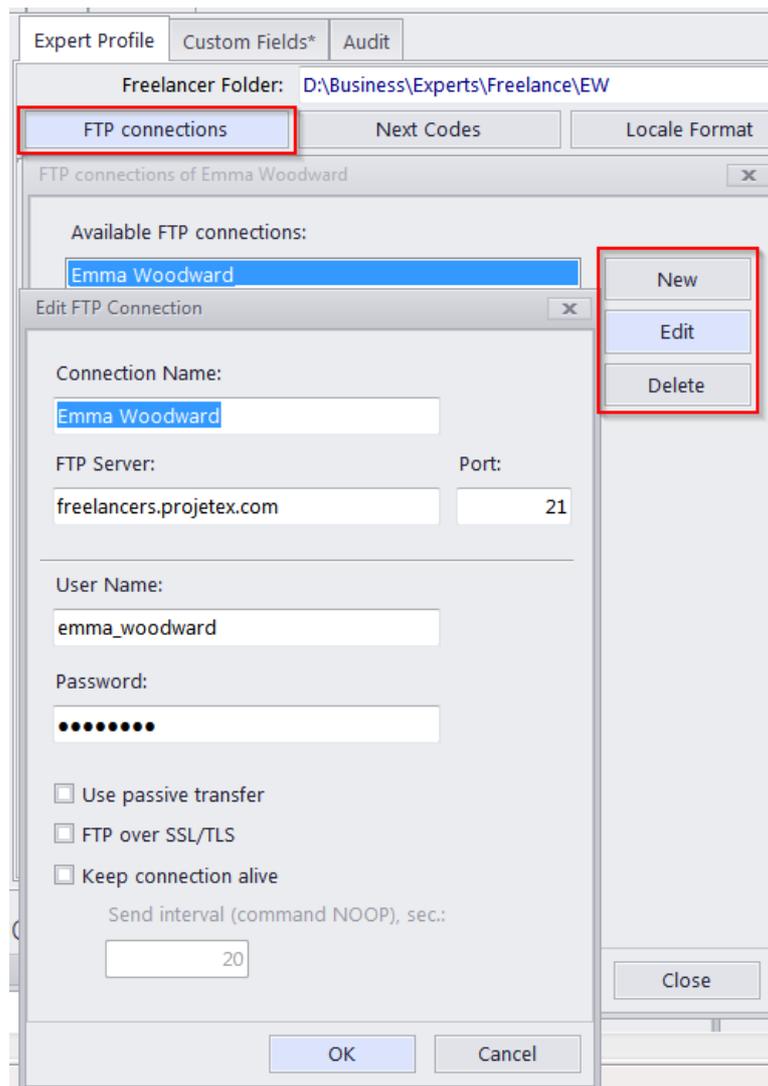
# Freelancer FTP connections

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

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

- **Connection Name** — this name has no syntax requirements and can be no longer than 50 characters.
- **FTP Server** — address of FTP server (for example ftp.server.com). Can be no longer than 50 characters. You can also specify which **Port** to use.
- **User Name** — login, normally issued by FTP server administrator. This login will be used when Projetex attempts to connect to FTP. Can be no longer than 50 characters.
- **Password** — this password will be used when Projetex attempts to connect to FTP. Can be no longer than 50 characters.
- **Passive file transfer** option allows to enable passive mode for this connection. Consult FTP server administrator regarding the type of file transfer you should use. If you are unsure, you can leave **Passive file transfer** check box empty.
- **FTP over SSL/TLS** to set if the connection supports encryption. Consult FTP server administrator as to whether you should use this option.
- **Keep connection alive** sets whether Projetex should continue trying to connect to a non-responding FTP address. If this option is enabled, you can also set the interval between connection attempts.

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



See also:

Main Tab of Freelancer Window

Files Tab of Freelancer Window

# Freelancer Window Application Tab

The **Application** tab of the **Freelancer** window can be used to enter the selected freelancer's recruiting information, employment history and other HR data. Project managers can also check this tab to view any additional information on the freelancer before assigning him or her to a freelance job.

Click the **Application Notes** button to enter general notes about the selected freelancer's application.

The **Application Tracker** can be used to enter records about certain events (i.e. interviews, and so on.) which occurred on a certain date. The application tracker can contain any number of records, each having a **Date**, **Subject** (250 characters maximum) and **Description** (a plain text note with no length limitation). The **Date** and **Subject** fields of a record cannot be empty.

Records in the application tracker can be sorted by **Date** or by **Subject**.

Hilda Herald: Application

Main Application Prices Quotes Freelance Jobs POs Payments Account Files Info Calendar

Application Notes:

Application Tracker

New Record Edit Delete

Drag a column header here to group by that column

*	Date	Subject
▶	08.12.2006	Sent a cv
	04.12.2006	Was sent a test
	14.12.2012	Completed the test

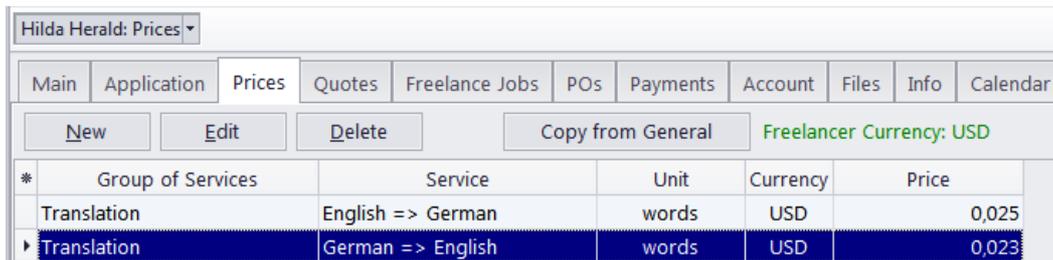
---

See also:

[Freelancer Window](#)

# Freelancer Window Prices Tab

Each freelancer in Projetex can have a set of prices individual to this particular freelancer. These prices can be assigned on the **Prices** tab of the **Freelancer** window. An individual freelancer's price list is maintained in the *freelancer's currency*. Only one price per group of services, service and unit combination can exist in the individual price-list.

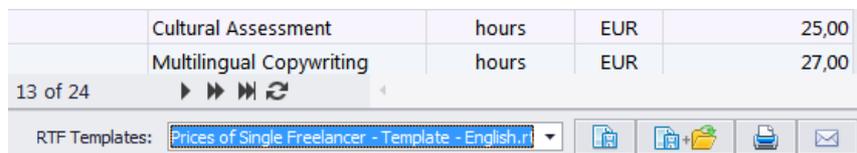


* Group of Services	Service	Unit	Currency	Price
Translation	English => German	words	USD	0,025
Translation	German => English	words	USD	0,023

Use the **New/Edit/Delete** buttons to manage the prices for the selected freelancer.

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

You can print a freelancer's price list or save it in a text file by selecting the template and clicking the **Save, Save & Open** or **Print** buttons at the bottom of the **Prices** tab of the **Freelancer** window.



Cultural Assessment	hours	EUR	25,00
Multilingual Copywriting	hours	EUR	27,00

You can also click the **Send Mail** button to open the Projetex Mail Sender and send it to the freelancer's E-mail address as an attachment.

To configure price list templates in the **Backstage** view click **Corporate Settings**, then click **Templates**. Templates for prices are stored in the *D:\BusinessServer\Templates\EXPERTS\FREELANCE\Prices\* folder.

---

See also:

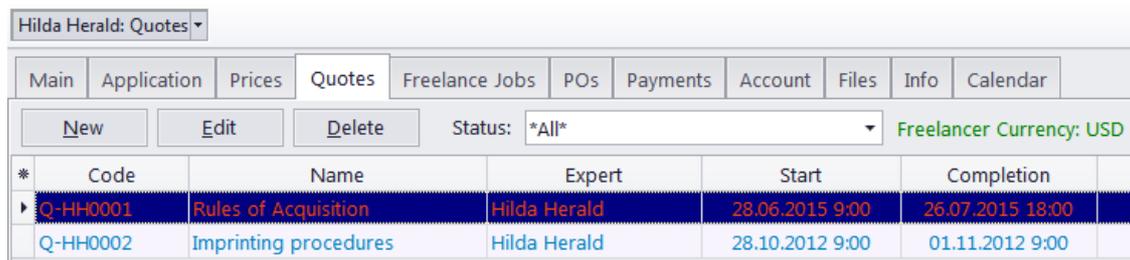
[Freelancer Window](#)

[Freelancer Prices window](#)

[Managing price lists](#)

# Freelancer Window Quotes Tab

The **Quotes** tab of the **Freelancer** window can be used to record the quotes of this freelancer. To view the list of freelancer's quotes, open the **Freelancer** window and switch to the **Quotes** tab.



The screenshot shows the 'Hilda Herald: Quotes' window. It has a menu bar with 'Main', 'Application', 'Prices', 'Quotes', 'Freelance Jobs', 'POs', 'Payments', 'Account', 'Files', 'Info', and 'Calendar'. Below the menu bar are buttons for 'New', 'Edit', and 'Delete', a 'Status' dropdown menu set to '\*All\*', and 'Freelancer Currency: USD'. The main area contains a table with the following data:

* Code	Name	Expert	Start	Completion
Q-HH0001	Rules of Acquisition	Hilda Herald	28.06.2015 9:00	26.07.2015 18:00
Q-HH0002	Imprinting procedures	Hilda Herald	28.10.2012 9:00	01.11.2012 9:00

## Freelancer Quote Controls

The quote management buttons are located on the left side of the **Quotes** tab of the **Freelancer** window.

The **New Quote** button opens the **New Freelance Quote** window, where details of a new freelancer quote can be added.

The **Edit** button opens the **Edit Freelancer Quote** window, where details of currently selected quote can be edited.

The **Delete** button deletes currently selected quote.

The **Status** drop-down list can be used to display only the quotes with a certain status.

## Freelancer Quote Status

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

- **Blue** for unknown status
- **Green** for accepted status
- **Red** for rejected status
- **Purple** for received or corrected status

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

See also:

[Freelancer Window](#)

[Freelancer Quotes Window](#)

[Creating/Editing Freelancer/Applicant quotes](#)

# Freelancer Window Freelance Jobs Tab

The **Freelance Jobs** tab displays all jobs of the currently selected freelancer.

Jobs can not be created, deleted, or edited here. This tab serves only to store previously created jobs.

* Expert	Job Code	Job Name	Assigned	Deadline
Hilda Herald	J-HH0001	"New challenges in virtual world" article	16.02.2015 0:00	07.03.2015 18:00
Hilda Herald	J-HH0003	Proofread www.enigmaservertech.com (im	27.05.2015 14:28	02.06.2015 18:00

## Filtering Freelance Jobs

Using the **Status** drop-down list you can choose to filter only jobs with a particular status, like *vacant*, *not completed*, *due today* and so on.

Using the **PO Issued** drop-down list you can set Projetex to display only jobs for which a purchase order has been or has not been issued, or free jobs.

The **Project Manager** filter drop-down list allows you to view only jobs managed by a particular *Project Manager*.

## Freelance Jobs statuses

Freelance jobs are displayed in different colors, depending on their completion status:

**Black** — the freelance job is

**Green** — the freelance job is

**Blue** — the freelance job is

**Red** — the freelance job is

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

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

**Orange background** — *On Hold* status

**Green background** — *Heads-Up* status

**Grey background** — *Canceled* status

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

See also:

[Freelancer Window](#)

[Freelance Jobs Window](#)

[Creating freelance jobs](#)

# Freelancer Window POs Tab

Use the **Purchase Orders** tab to view purchase orders issued to the currently selected freelancer. New purchase orders cannot be created from this tab, however, existing ones can be edited.

Hilda Herald: POs										
Main	Application	Prices	Quotes	Freelance Jobs	POs	Payments	Account	Files	Info	Calendar
Edit										
Status: *All*				Approved: *All*		PM: *All*		Freelancer Currency: USD		
* PO Code	Global PO Code	Date Sent	Expert Name	Project Code	Project Name	Project Manager	Date Due	Status		
▶ PO-HH0001	ACME-10012/2014	10.10.2014	Hilda Herald	0020	"New challenges in virtual world" article	William McSun	08.01.2015	Settled: 61 days earlier		
PO-HH0002	ACME-10034/2015	27.01.2015	Hilda Herald	0058	Translation software market review	William McSun	27.04.2015	Settled: 86 days later		

## PO Statuses

Purchase order statuses change depending on your payment terms to freelancers and any payments linked to purchase orders.

**Green** — the purchase order is *outstanding* and is expected *to be paid soon*.

**Blue** — the purchase order is *outstanding* and is expected *to be paid today*.

**Red** — the purchase order is *outstanding* and its *payment is overdue*.

**Pink** — the purchase order is *not invoiced*.

the purchase order has been *settled* (paid).

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

Projetex automatically assigns statuses to POs depending on each freelancer's payment terms.

## Filtering POs

Use **Status** drop-down list to filter out only those **Purchase Orders** which have selected status.

Use **Approved** drop-down list to filter out those **POs** which have or have not been approved by project managers.

 **Note:** **POs** can be created and deleted in **POs** tab of **Project** window.

See also:

[Freelancer Window](#)

[Freelancer POs Window](#)

[Creating Purchase Orders](#)

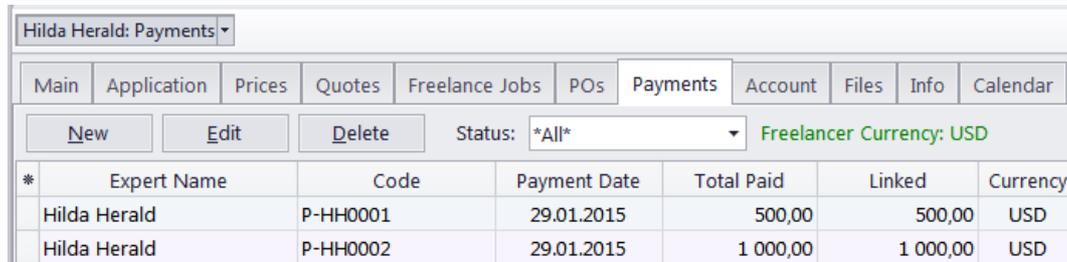
# Freelancer Window Payments Tab

The **Payments** tab of the **Freelancer** window displays records of payments to the currently selected freelancer. Payments can be created, edited and deleted here.

Payments to freelancers can be linked to purchase orders, fully or partially. If the sum of the linked payment values matches the *PO total*, this purchase order is considered "settled". Payments are also added to company expenses on **Balance** tabs.

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

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



The screenshot shows the 'Hilda Herald: Payments' window. It features a navigation bar with tabs: Main, Application, Prices, Quotes, Freelance Jobs, POs, Payments (selected), Account, Files, Info, and Calendar. Below the tabs are buttons for 'New', 'Edit', and 'Delete', a 'Status' dropdown menu set to '\*All\*', and a 'Freelancer Currency: USD' label. The main area contains a table with the following data:

* Expert Name	Code	Payment Date	Total Paid	Linked	Currency
Hilda Herald	P-HH0001	29.01.2015	500,00	500,00	USD
Hilda Herald	P-HH0002	29.01.2015	1 000,00	1 000,00	USD

---

See also:

[Freelancer Window](#)

[Freelancer Payments Window](#)

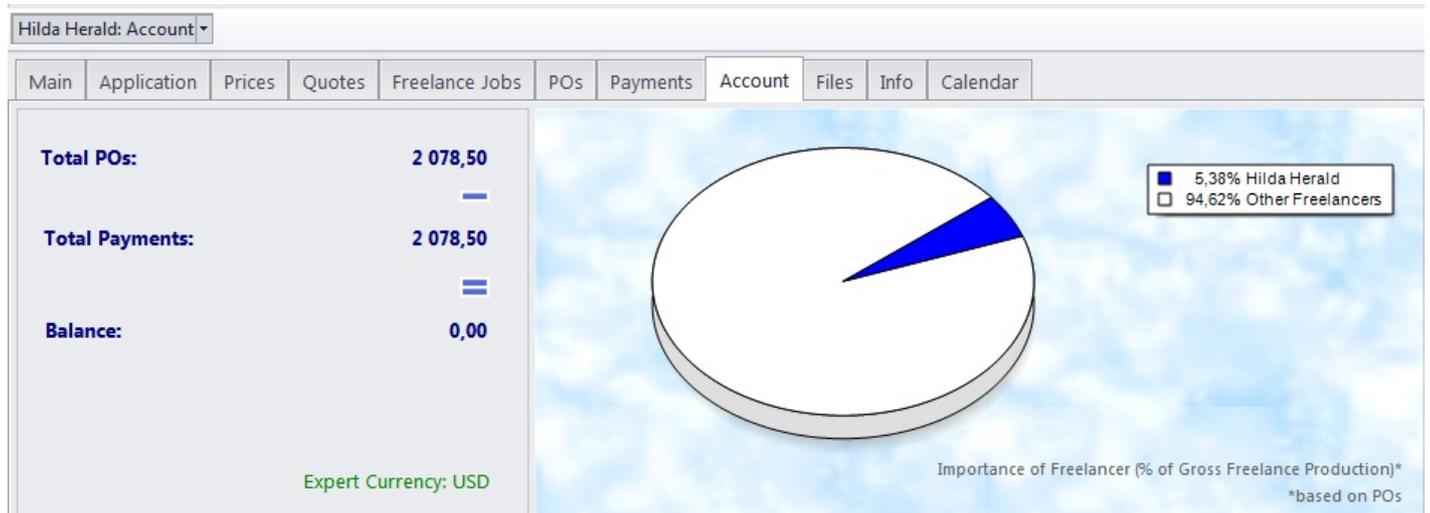
[Creating Payments](#)

# Freelancer Window Account Tab

The **Account** tab of the **Freelancer** window displays a brief summary of the selected freelancer's accounts.

This balance includes the total of purchase orders, issued to this freelancer, the total of payments, paid to this freelancer, and the account balance (total POs minus total payments).

The pie diagram represents the share of this freelancer in the overall purchase orders issued to all freelancers.



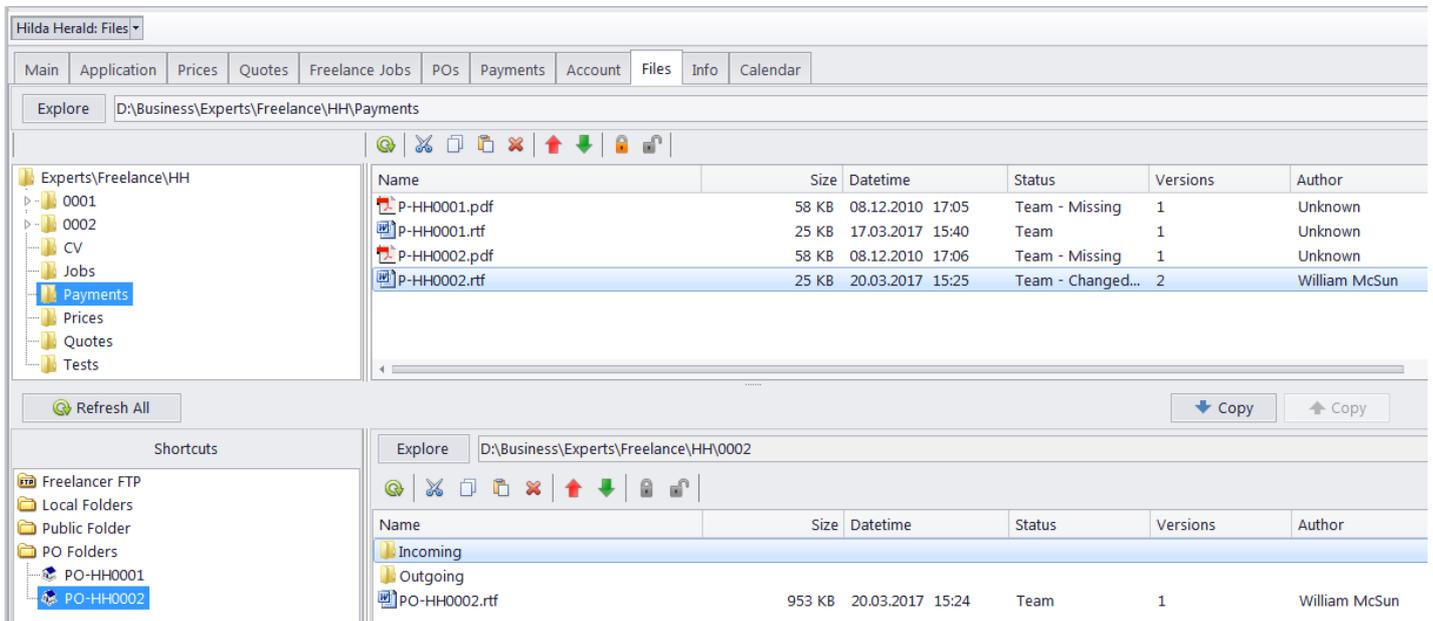
See also:

[Freelancer Window](#)

[Freelancer Accounts Window](#)

# Freelancer Window Files Tab

The **Files** tab of the **Freelance Expert** window can be used to create, view and search for files and folders related to this expert. This tab can also be used to access remote FTP folders.



The window contains two horizontal panes. The upper pane shows the folder tree for the selected freelancer's folder and the content of the currently selected sub-folder. The pane underneath allows to open shortcuts. Clicking any of the **Shortcuts** will create a second file view field to the right, and open the appropriate folder there. This allows to simultaneously work with two opened folders in the same window.

Files between the freelancer folder and external resources (local folders, FTP) can be exchanged through **Copy** buttons.

- is used to copy files from the path currently opened in the Shortcuts pane to the freelancer folder .
- is used to copy files from the freelancer folder to the path currently opened in the Shortcuts pane.

The context menu contains the following specific file operations:

The **Open** command opens the file in the appropriate application

The **Upload** command uploads the file from the local *Business* folder to the *BusinessServer* folder on the Server.

**Download** can be used to download the file in the *BusinessServer* folder on the Server to the *Business* folder on the Workstation PC.

**Download version** opens a window that contains information about all versions of a particular file.

Each file can have one of the following statuses:

**Team** - the files stored in the *BusinessServer* folder on the server and in local storage are identical.

**Team - Changed on Workstation** - the local copy of the file has been modified, the file on the server has not been updated.

**Team - Changed on Server** - the file on the server has been modified, the local copy has not been updated.

**Team - Missing** - the file exists on the server, but has not been downloaded to the local PC yet (or has been deleted locally).

**Local** - the file exists locally, but has not been uploaded to server yet (or has been deleted on the server).

See also:

Freelancer Window

Working with files in Projetest

# Freelancer Window Info Tab

The **Info** tab of the **Freelancer** window can be used to enter any additional information regarding the selected freelance expert in plain text format. These notes will be available for all project managers.

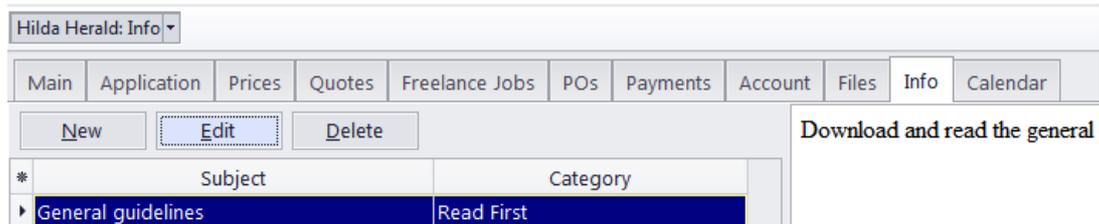
Each note has the following attributes:

**Subject** — can be up to 100 characters long.

**Category** — to add more categories of notes, in the **Backstage** view, click **User Settings**, then click **Categories**.

**Information** — plain text note, any number of characters long.

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



---

See also:

Freelancer Window

Categories

# Freelancer Window Calendar Tab

The **Calendar** tab of the **Freelancer** window displays the time constraints and status of this expert's *freelance jobs*. Each job block stretches across the calendar from assignment until completion, or until the deadline if the job has not been completed yet. Double-click any block to open the corresponding job for editing.

The screenshot shows the 'Calendar' tab in the Freelancer window. The window title is 'Hilda Herald: Calendar'. The ribbon includes tabs for Main, Application, Prices, Quotes, Freelance Jobs, POs, Payments, Account, Files, Info, and Calendar. The calendar view is for February 2015, with days of the week in Ukrainian: понеділок (Monday), вівторок (Tuesday), and середа (Wednesday). The calendar shows three job blocks for the article 'New challenges in virtual world', each spanning from the 16th to the 18th of the month. The job blocks are colored orange. On the left side, there is a mini-calendar for February 2015, a 'Job Status' dropdown menu set to '\*All\*', and a 'Project Managers' dropdown menu also set to '\*All\*'. The main calendar grid shows dates 16, 17, 18, 23, 24, 25, 2, 3, 4.

## Settings of the Calendar view

The following settings for the calendar page are available:

**Viewed period** - the Ribbon displays icons for selecting the time interval to be viewed and moving backward and forward interval by interval.

**Mini-calendar** - the mini-calendar on the left displays the month and date currently viewed. Click a date to switch to it. To move to a different month, click the greyed-out dates, the Back and Forwards buttons in the month header, or the header itself. Click and drag across the mini-calendar to display a number of sequential days.

## Job calendars colors

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

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

**Blue** — the job is *not completed* and *due today*.

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

**Grey** — the job is *canceled*.

**Pale Pink** — the job is *completed*.

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

**Pale Orange** — the job is *On Hold*.

 **Note:** To customize status colors in the **Backstage** view select the **User Settings** section, then click **Colors: Statuses**.

## Filtering

Use the **Job Status** filter to display jobs only with a certain status, such as *vacant* (no expert assigned), *overdue*, *completed* and so on.

Use the **Project Manager** filter to display jobs only led by certain project managers.

---

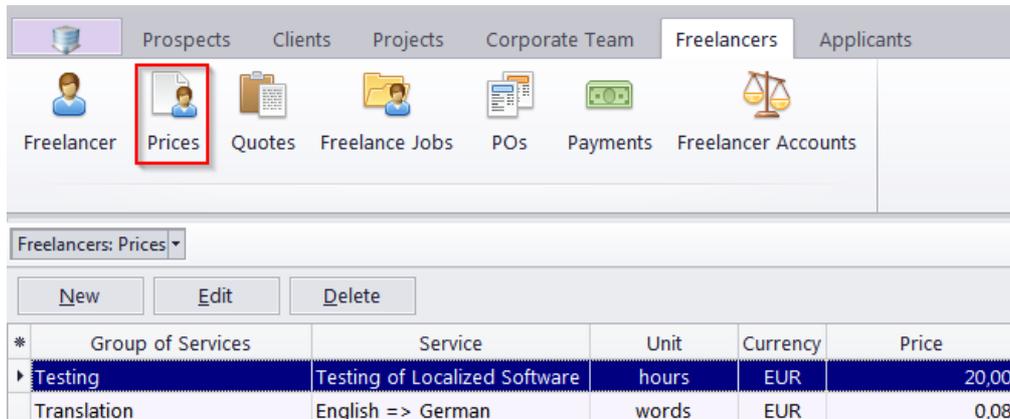
See also:

Freelancer Window

The Calendar

# Freelancer Prices window

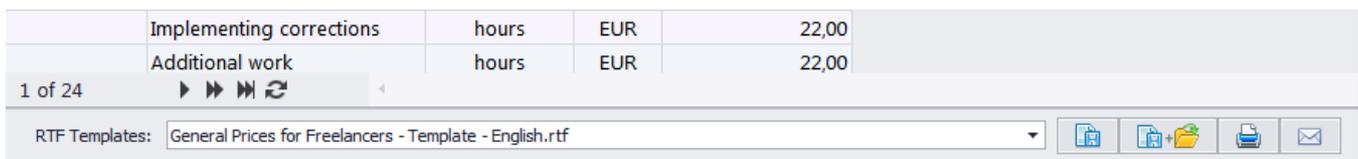
The **Freelancer Prices** window contains your general *price list* for services offered by your freelancers. These prices can be used when creating freelance quotes, freelance jobs and *POs* for any freelancer in your database.



Use the **New/Edit/Delete** buttons to manage the prices here.

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

Prices from this window can be copied to any individual freelancer's price list.



You can *print* your general freelance services price list, save it in a text file or send it via e-mail by selecting the template and clicking the **Save**, **Save & Open**, **Print**, or **Send Mail** buttons at the bottom of the window.

To configure the price list templates, in the **Backstage** view click **Corporate Settings**, then click the **Templates** section. Templates for prices are stored in the *D:\BusinessServer\Templates\EXPERTS\FREELANCE\Prices* folder.

---

See also:

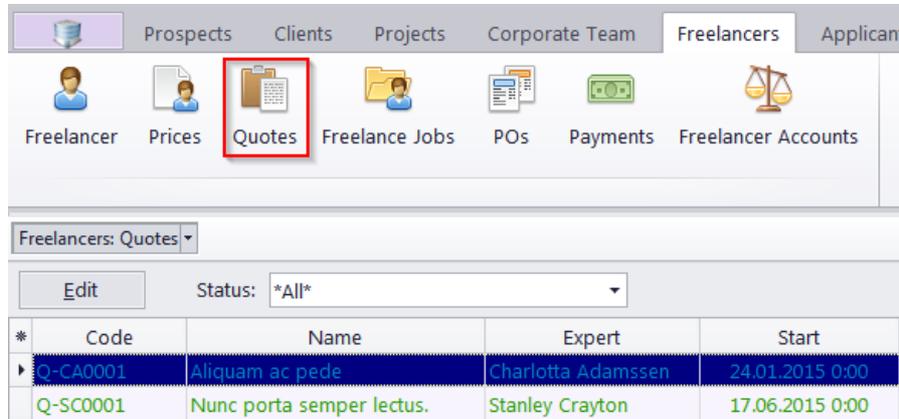
Prices Tab of Freelancer Window

Managing price lists

# Freelancer Quotes Window

The **Freelancer Quotes** window provides an overview of all freelancer quotes. The options available for this window are the same as those for the **Quotes** tab of the **Freelancer** window. The major differences are:

- The **Freelancer Quotes** window displays all quotes from freelancers.
- New freelancer quotes cannot be created using this window.
- Existing freelancer quotes cannot be deleted using this window.



* Code	Name	Expert	Start
Q-CA0001	Aliquam ac pede	Charlotta Adamssen	24.01.2015 0:00
Q-SC0001	Nunc porta semper lectus.	Stanley Crayton	17.06.2015 0:00

The **Status** filter drop-down list can be used to display only quotes with a certain status.

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

- **Blue** for unknown quote status
- **Green** for accepted quote status
- **Red** for rejected quote status
- **Purple** for received or corrected quote status

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

See also:

Quotes Tab of Freelancer Window

# Freelancer POs Window

The **Freelancer POs** window provides a general list of all purchase orders issued to all freelancers in the database. Use this window to identify currently unpaid POs, obtain a total of balance due according to all purchase orders issued, as well as to quickly issue a large amount of POs.

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

- The **Freelancer POs** window displays all POs for all freelancers.
- New POs cannot be created using this window.
- Existing POs cannot be deleted using this window.

To create a new purchase order, open the **Main** tab of the **Projects** window, select the required project, and click the **POs** tab.

To quickly create a large number of purchase orders, click the **Mass POs** button.

* PO Code	Global PO Code	Date Sent	Expert Name	Project Code	Project Name	Project Manager	Date Due
PO-MB0003	ACME-I0030/2015	15.01.2015	Melissa Beaumont	0054	Winlexic localization testing	William McSun	No invoice
PO-KH0002	ACME-I0031/2012	11.12.2012	Koen Haanrath	0045	Booklet about Unlimited Concepts Unified	William McSun	No invoice

## PO Statuses

Purchase order statuses change depending on your payment terms to freelancers and payments linked to purchase orders.

**Green** — the purchase order is *outstanding* and is expected *to be paid soon*.

**Blue** — the purchase order is *outstanding* and is expected *to be paid today*.

**Red** — the purchase order is *outstanding* and its *payment is overdue*.

**Pink** — the purchase order is *not invoiced*.

**Black** — the purchase order has been *settled* (paid).

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

Projetex automatically assigns statuses to POs depending on each freelancer's payment terms.

## Filtering POs

Use the **Status** drop-down list to filter out only **Purchase Orders** with the selected status.

Use the **Approved** drop-down list to filter out **POs** which have or have not been approved by project managers.

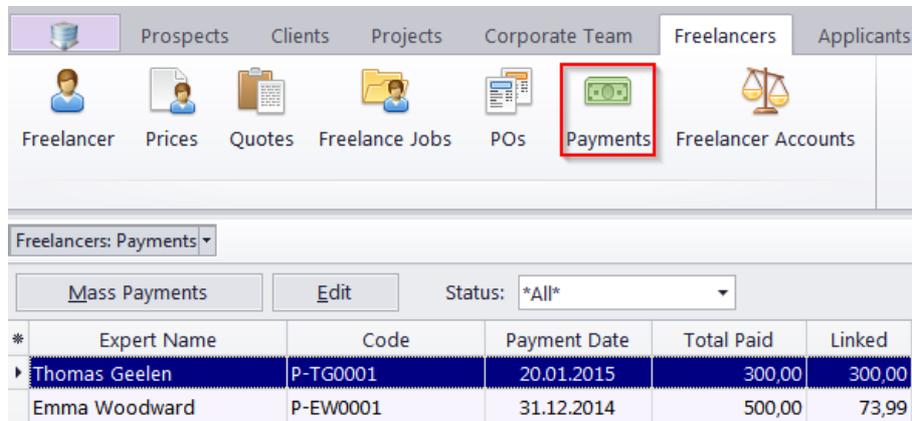
The **Project Manager** filter drop-down list allows you to view only POs managed by a particular *Project Manager*.

See also:

POs Tab of Freelancer Window

# Freelancer Payments Window

The **Freelancer Payments** window displays all *payments* received from all *freelancers*. This window can be used to edit payments, create **Mass payments to freelancers** and calculate the totals of all *Payments to Freelancers* in the base currency. Use the **Status** filter drop-down list to display only payments with a particular status. Use this filter to view either the payments which are still to be linked with invoices, or only the fully linked ones..



* Expert Name	Code	Payment Date	Total Paid	Linked
▶ Thomas Geelen	P-TG0001	20.01.2015	300,00	300,00
Emma Woodward	P-EW0001	31.12.2014	500,00	73,99

---

See also:

Payments Tab of Freelancer Window

# Freelancer Accounts Window

The **Freelancer Accounts** window presents a simplified balance sheet of your freelancers based on your purchase orders and payments to freelancers. Accounting staff can use this window to identify freelancer accounts which require attention.

Accounts can be viewed both in freelancers' currencies and your base currency: use the **View** drop-down list to select a currency in which records should be displayed.

Alternatively you can use the **Customize columns** option to add freelancer currency columns to view.

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

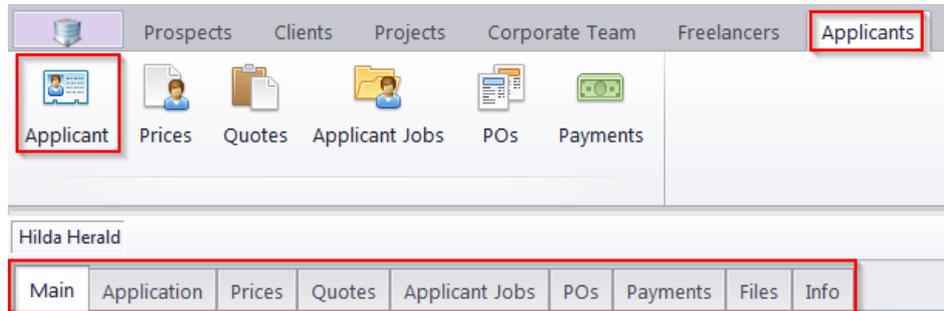
See also:

[Account Tab of Freelancer Window](#)

# Applicant Window

The **Applicant window** can be used to effectively keep track of freelance applicants and their activities, and update and search through your applicant database and convert the applicants into freelancers if they satisfy your requirements. The documentation of former or inactive freelancers can also be stored here.

To open the **Applicant** window click the **Applicant** icon from the **Applicants** tab of the Ribbon.



## Applicant Window tabs

Different tabs of the **Applicant** window represent different data, relevant to certain applicants in your database. All applicant data is broken into the following tabs:

- The **Main** tab — contains the *list of your applicants* and their *profiles*. New applicants can be entered into database here.
- The **Application** tab — contains application information of the selected applicant, added by HR staff.
- The **Prices** tab — is used to enter, edit and check the prices of the currently selected applicant.
- The **Quotes** tab — contains all quotes received from the currently selected applicant.
- The **Applicant Jobs** tab — gives an overview of jobs assigned to the selected former or inactive freelancer.
- The **POs** tab — is used for storage of purchase orders (POs) for the selected former or inactive freelancer.
- The **Payments** tab — holds information on payments made to the currently selected former or inactive freelancer.
- The **Files** tab — provides quick access to the selected applicant's folder, as well as to other files related to this applicant.
- The **Info** tab — this tab is used for various notes related to the selected applicant.

---

See also:

Workspace Icons

# Main Tab

The **Main** tab of the **Applicant** window contains information of your prospective freelance experts. You can add new applicant records here or edit existing ones. The two primary areas of the **Main** tab of the **Applicants** window are the *list of applicants* and the *applicant profile*.

The screenshot shows the 'Main' tab of the Applicant window. On the left, there is a table listing applicants. The table has columns for Name, Currency, Country, and City. The first row is highlighted, showing 'Hilda Herald', 'USD', 'United States', and 'Miami Beach'. Above the table are buttons for 'New Applicant', 'Delete', and 'Move to Freelancers', along with a search bar. On the right, the 'Expert Profile' tab is active, displaying details for Hilda Herald: Expert Code: HH, Name: Hilda Herald, Postal Address: 321 Collins Avenue, Miami Beach, Florida 33139, Contact Info: E-mail: hilda@aithelp.com, Phone: +1 305 790234, Web: www.aithelp.com, Payment Terms: Within 90 days (from PO issue date), VAT Number: (empty), Expert Currency: USD, Expert Status: Active, and Applicant Folder: D:\Business\Experts\Applicant\HH. There are also buttons for 'FTP connections' and 'General Information'.

## Browsing Applicants

You can search for specific applicants by using the **Find** panel. Enter a few characters from the applicant's name, or any other column displayed in the table, and the table will show only those entries that contain the characters.

Click any applicant in the list to view the profile of this applicant to the right.

Once a new applicant has been added to database, his or her profile can be edited at any time.

If the applicant satisfies your requirements and you come to an agreement, you can change them into a freelancer by clicking "**Move to Freelancers**".

Each applicant can have a flag assigned to him/her. Applicant flags can be changed by right-clicking the entry and choosing the flag.

Applicants are listed in the form of a table. You can change the columns displayed in the table by using the **Customize Columns** option.

## Applicant profile

The profile of the currently selected applicant can be viewed to the right.

**Expert code** — This code will be used in document codes for this applicant. The expert code will also be used as the name of this applicant's folder.

**Name** — Use this field to enter or edit the name of the currently selected applicant. An applicant's name can be no longer than 150 characters.

**Postal Address** — Enter the postal address of the currently selected applicant. This information will be automatically inserted into the applicant's documents. See the Postal address of applicant topic for more details.

**Contact info** — Click this button to enter additional contact information on this applicant. See the General Contact Information of applicant topic for more details.

**Web** — opens the Edit Web Links dialog box, providing field for entering a web site address (URL), LinkedIn, Facebook, and Twitter accounts of the applicant. Click the address or the social media icons to open the corresponding links in your Internet browser.

**Payment Terms** — You can set specific payment terms to each of your applicants. Payment terms settings will determine when the purchase orders of this applicant become *outstanding* and *overdue*, once the applicant becomes a full freelancer. See the Payment Terms of Applicant topic for more details.

**VAT number** — Regulations in some countries may require you to indicate VAT codes (or numbers) in financial documents. The applicant's VAT number, entered in applicant's profile can be automatically displayed in this applicant's printable documents.

**Expert currency** — Select the currency of this particular applicant. The expert currency will be used in all documents of this applicant.

**Expert Status** — Set the applicant's availability status as Active, Inactive, or Potential.

**Expert folder** — The applicant's folder contain prices, quotes and other information relevant to the applicant. Projetex automatically creates, updates and maintains links between applicants in the database and their folders. The expert code of this applicant is used as the folder's name. The folder is created automatically and its location in the **Business folder** is displayed in the **Expert folder** field. Click the folder button on the right side of the field to open this folder in the Projetex 3D explorer.

**FTP Connections** — you can set parameters for access to the applicant's FTP folders. Shortcuts to these folders will be automatically added to the **Files** tab of this expert's window. See the Applicant FTP connections topic for more details.

**General Information** — the applicant's profile can contain any general information, relevant to this applicant in a form of a plain text note.

## Custom data of Applicant

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

 **Note:** Only users with access to Projetex Server Administrator can add or remove custom fields.

## Audit

The **Audit** tab keeps track of when and by whom the applicant profile was created or modified.

---

See also:

[Adding/Editing Experts and Applicants](#)

# Postal address of applicant

The postal address of an applicant determines the applicant's country of residence, and is automatically added to quotes of this applicant. The following postal address data can be added:

**Street Address** — two separate addresses can be added. Each address entry can be 50 characters maximum. When editing quote templates you can choose which of the two addresses a quote should contain.

**City** — can be maximum 40 characters long.

**State** — maximum 40 characters long.

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

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

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

The screenshot shows two overlapping windows from a software application. The background window is titled 'Edit Postal Address' and has tabs for 'Expert Profile', 'Custom Fields', and 'Audit'. The 'Postal Address:' tab is selected and highlighted with a red box. It displays the following information: '321 Collins Avenue, Miami Beach', 'Miami Beach', 'Florida', '33139', and 'United States'. Below this, it shows 'Local Time: 13.06.2017 4:45' and 'Time Zone: (UTC-05:00) Eastern Time (US\_Canada)'. The foreground window is titled 'Time Zone Settings' and has a dropdown menu for 'Time Zone:' with '(UTC-05:00) Eastern Time (US & Canada)' selected. It also shows 'Current date and time: 13.06.2017 4:45'. Both windows have 'OK' and 'Cancel' buttons at the bottom.

See also:

Main Tab of Applicant Window

# General Contact Information of applicant

**Photo** — an image file can be a maximum of 70x70 pixels. Click the frame to either **Load** a photo from a file or click **Assign from Camera** to take a picture with a camera connected to the machine. The following formats can be used: JPG, JPEG, .BMP (bitmap), .GIF (Graphics Interchange Format).

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

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

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

The screenshot displays the 'Edit Freelancer Contact Info' dialog box. At the top, the name 'Hilda Herald' is shown. Below it, there are input fields for 'E-mail' (containing 'hilda@aithelp.com'), 'E-mail 2', 'Phone' (containing '+1 305 790234'), 'Phone 2', 'Phone 3', 'Phone 4', and 'Fax'. Each input field has a corresponding 'Send' button. A context menu is open over the name field, listing actions: Copy, Paste, Delete, Load..., Assign From Camera..., and Save As... The background window shows the 'Contact Info' tab with the same information displayed.

See also:

Main Tab of Applicant Window

# Payment Terms of Applicant

According to the payment terms of an applicant, Projetex will keep track of unpaid POs and update status of outstanding purchase orders once the applicant is converted into a freelancer, making them overdue, due today, due tomorrow, and so on.

With the help of the **Edit Payment Terms** dialog you can configure payment conditions of the selected applicant, including:

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

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

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

**Additional Notes** — a plain text note with no maximum length.

The screenshot shows a software window titled 'Expert Profile' with three tabs: 'Expert Profile', 'Custom Fields', and 'Audit'. The 'Payment Terms' tab is selected and highlighted with a red border. Below the tabs, the text 'Payment Terms: Within 90 days (from PO issue date)' is displayed. Below this is a sub-dialog titled 'Edit Payment Terms' with a close button (X). The sub-dialog contains the following elements:

- Text: 'Between: Vitaliy Gutyk and: Hilda Herald'
- Field: 'Minimum Fee: 0 (0 - No Minimum Fee)' with a spinner control.
- Dropdown: 'From PO issue Date' with a downward arrow.
- Radio buttons for payment terms:
  - Within 90 days
  - On day 10 of the same month
  - On day 10 of the next month
  - On day 10 of the month following next
  - Unknown/Other
- Text: 'Additional Notes:' followed by a large empty text area.
- Buttons: 'OK' and 'Cancel' at the bottom right.

---

See also:

Main Tab of Applicant Window

# Applicant FTP connections

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

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

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

**FTP Server** — the address of FTP server (for example ftp.server.com). Can be no longer than 50 characters. You can also specify which **Port** to use.

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

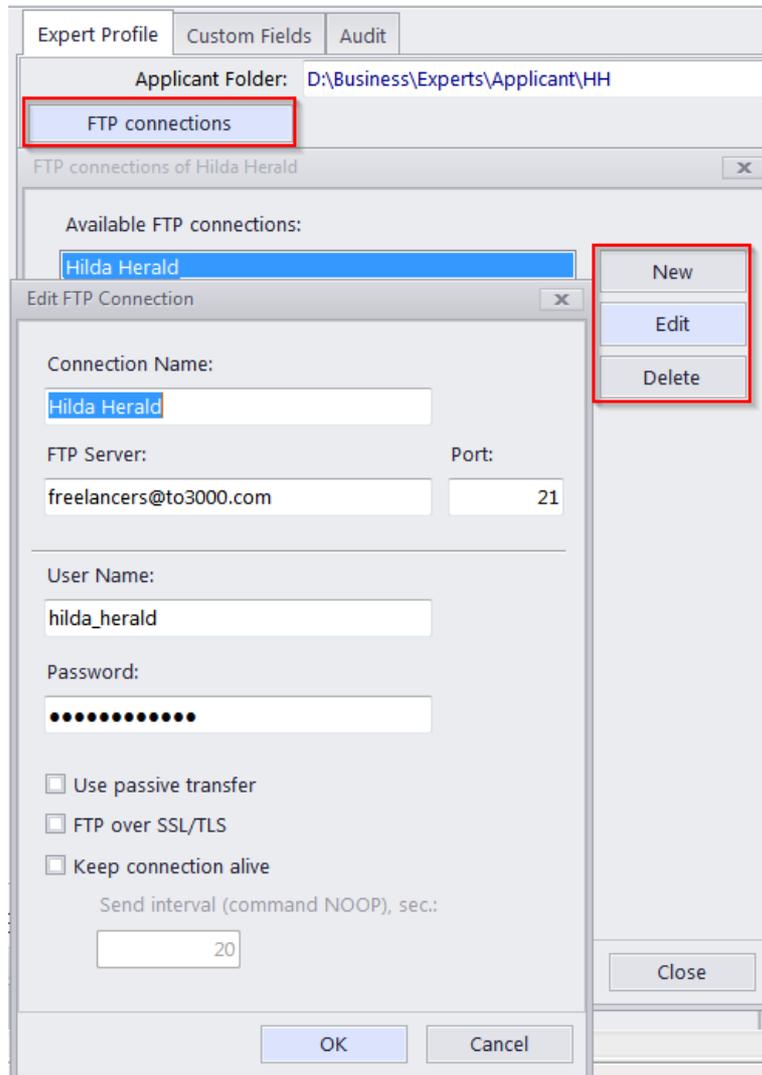
**Password** — this password will be used when Projetex attempts to connect to FTP. Can be no longer than 50 characters.

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

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

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

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



See also:

Main Tab of Applicant Window

Files Tab of Applicant Window



# Applicant Window Application Tab

The **Application** tab of the **Applicant** window can be used to enter recruiting information of this applicant, employment history and other HR data. Project managers can also check this tab to view any additional information on the applicant before deciding whether to convert them into a full freelancer.

Click the **Application Notes** button to enter general notes about this applicant's application.

The **Application Tracker** can be used to enter records about certain events (i.e. interviews, and so on.) which occurred on a certain date. The Application tracker can contain any number of records, each having a **Date**, **Subject** (250 characters maximum) and **Description** (plain text note with no length limitation). The **Date** and **Subject** fields of a record cannot be empty.

Records in the application tracker can be sorted by **Date** or by **Subject**.

Hilda Herald: Application ▾

Main Application Prices Quotes Applicant Jobs POs Payments Files Info

Application Notes:

Application Tracker

New Record Edit Delete

Drag a column header here to group by that column

*	Date	Subject
▶	08.12.2006	Sent a cv
	04.12.2006	Was sent a test
	14.12.2012	Completed the test

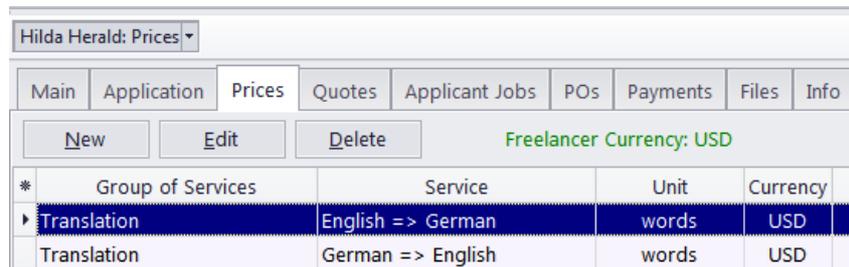
---

See also:

[Applicant Window](#)

# Applicant Window Prices Tab

Each applicant in Projetex can have a set of prices individual to them. These prices can be assigned on the **Prices** tab of the **Applicant** window. An individual applicant's price list is maintained in the *applicant's currency*. Only one price per group of services, service and unit combination can exist in an individual price-list.



* Group of Services	Service	Unit	Currency
Translation	English => German	words	USD
Translation	German => English	words	USD

Use the **New/Edit/Delete** buttons to manage the prices for the selected freelancer.

You can print an applicant's price list or save it in a text file by selecting the template and clicking the **Save, Save & Open** or **Print** buttons at the bottom of the **Prices** tab of the **Applicant** window.



You can also click the **Send Mail** button to open the Projetex Mail Sender and send it to the applicant's E-mail address as an attachment.

To configure the price list templates, in the **Backstage** view click **Corporate Settings**, then click **Templates**. Templates for prices are stored in the *D:\BusinessServer\Templates\EXPERTS\APPLICANT\Prices\* folder.

---

See also:

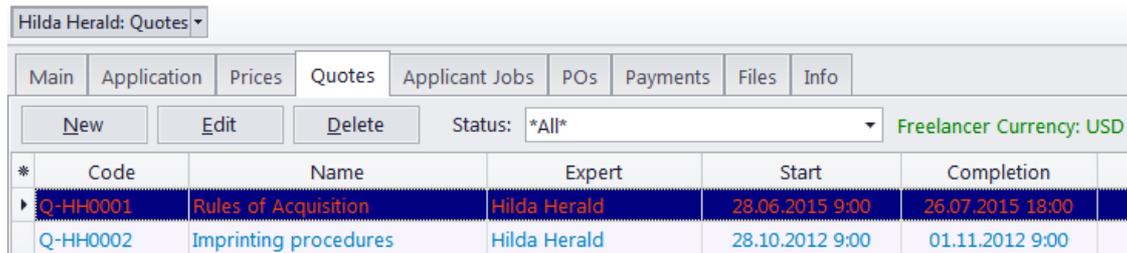
[Applicant Window](#)

[Applicant Prices Window](#)

[Managing price lists](#)

# Applicant Window Quotes Tab

The **Quotes** tab of the **Applicant** window can be used to manage the quotes of this applicant. To view the list of the applicant's quotes, open the **Applicant** window and switch to the **Quotes** tab.



* Code	Name	Expert	Start	Completion
Q-HH0001	Rules of Acquisition	Hilda Herald	28.06.2015 9:00	26.07.2015 18:00
Q-HH0002	Imprinting procedures	Hilda Herald	28.10.2012 9:00	01.11.2012 9:00

## Applicant Quote Controls

Quote management buttons are located on the left side of the **Quotes** tab.

The **New Quote** button opens the **New Freelance Quote** window, where the details of a new applicant quote can be added.

The **Edit** button opens the **Edit Applicant Quote** window, where the details of the currently selected quote can be edited.

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

The **Status** drop-down list can be used to display only quotes with a certain status.

## Applicant Quote Status

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

- **Blue** for unknown quote status
- **Green** for accepted quote status
- **Red** for rejected quote status
- **Purple** for received or corrected quote status

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

See also:

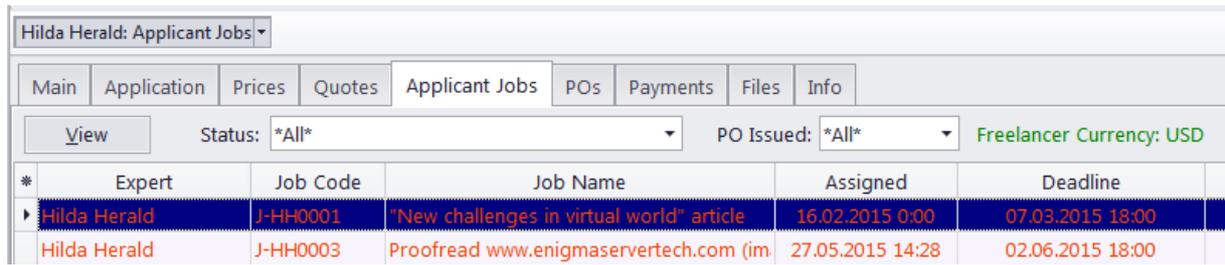
[Applicant Window](#)

[Applicant Quotes Window](#)

[Creating/Editing Freelancer/Applicant quotes](#)

# Applicant Window Applicant Jobs Tab

The **Applicant Jobs** tab displays all jobs of the currently selected former or inactive freelancer. Jobs can not be created, deleted, or edited here. This tab serves only to store previously created jobs.



* Expert	Job Code	Job Name	Assigned	Deadline
Hilda Herald	J-HH0001	"New challenges in virtual world" article	16.02.2015 0:00	07.03.2015 18:00
Hilda Herald	J-HH0003	Proofread www.enigmaservertech.com (im	27.05.2015 14:28	02.06.2015 18:00

## Filtering Applicant Jobs

Using the **Status** drop-down list you can display only jobs with a particular status, like *vacant*, *not completed*, *due today* and so on.

Using **PO Issued** drop-down list you can display only jobs for which purchase order has been or has not been issued, or free jobs.

## Applicant Jobs statuses

Applicant jobs are displayed in different colors, depending on their completion status:

- **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*.

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

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

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

---

See also:

Applicant Window

Applicant Jobs Window

# Applicant Window POs Tab

Use the **Purchase Orders** tab to view purchase orders issued to currently selected former or inactive freelancer. POs can not be created, deleted, or edited here. This tab serves only to store previously created POs.

Hilda Herald: POs ▾								
Main	Application	Prices	Quotes	Applicant Jobs	POs	Payments	Files	Info
View	Status: *All*		Approved: *All*		Freelancer Currency: USD			
* PO Code	Global PO Code	Date Sent	Expert Name	Project Code	Project Name			
PO-HH0001	ACME-I0012/2014	10.10.2014	Hilda Herald	0020	"New challenges in virtual world" article			
PO-HH0002	ACME-I0034/2015	27.01.2015	Hilda Herald	0058	Translation software market review			

## PO Statuses

Purchase order statuses change depending on your payment terms to former or inactive freelancers and your payment to former or inactive freelancers linked to purchase orders.

**Green** — purchase order is *outstanding* and is expected *to be paid soon*.

**Blue** — purchase order is *outstanding* and is expected *to be paid today*.

**Red** — purchase order is *outstanding* and its *payment is overdue*.

**Black** — purchase order has been *settled* (paid).

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

Projetex automatically assigns statuses to POs depending on each former or inactive freelancer's payment terms.

## Filtering POs

Use **Status** drop-down list to filter out only those **Purchase Orders** which have selected status.

Use **Approved** drop-down list to filter out those **POs** which have or have not been approved by project managers.

 **Note:** **POs** can be created and deleted in **POs** tab of **Project** window.

---

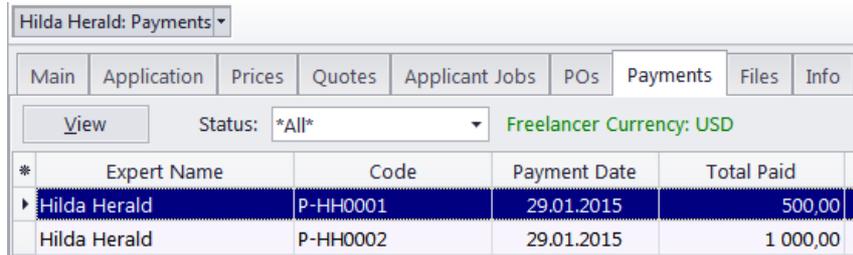
See also:

Applicant Window

Applicant POs Window

# Applicant Window Payments Tab

The **Payments** tab of the **Applicant** window displays records of payments to the currently selected former or inactive freelancer. Payments can not be created, deleted, or edited here. This tab serves only to store previously created payments.



The screenshot shows the 'Hilda Herald: Payments' window. It has a navigation bar with tabs: Main, Application, Prices, Quotes, Applicant Jobs, POs, Payments (selected), Files, and Info. Below the tabs is a 'View' button, a 'Status' dropdown menu set to '\*All\*', and 'Freelancer Currency: USD'. The main area contains a table with the following data:

* Expert Name	Code	Payment Date	Total Paid
Hilda Herald	P-HH0001	29.01.2015	500,00
Hilda Herald	P-HH0002	29.01.2015	1 000,00

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

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

---

See also:

[Applicant Window](#)

[Applicant Payments Window](#)

# Applicant Window Files Tab

The **Files** tab of the **Applicant** window can be used to create, view and search for files and folders related to this applicant. This tab can also be used to access remote FTP folders.

The screenshot shows the 'Files' tab of the Applicant window. The window title is 'Hilda Herald: Files'. The top menu bar includes 'Main', 'Application', 'Prices', 'Quotes', 'Applicant Jobs', 'POs', 'Payments', 'Files', and 'Info'. The 'Files' tab is active, showing the path 'D:\Business\Experts\Applicant\HH\Payments'. The left pane shows a folder tree with 'Experts\Applicant\HH' expanded, containing sub-folders '0001', '0002', 'CV', 'Jobs', 'Payments', 'Prices', 'Quotes', and 'Tests'. The right pane displays a table of files:

Name	Size	Datetime	Status	Versions	Author
P-HH0001.pdf	58 KB	08.12.2010 17:05	Team - Missing	1	Unknown
P-HH0001.rtf	25 KB	17.03.2017 15:40	Team	1	Unknown
P-HH0002.pdf	58 KB	08.12.2010 17:06	Team - Missing	1	Unknown
P-HH0002.rtf	25 KB	20.03.2017 15:25	Team - Changed...	2	William McSun

Below the upper pane is a 'Shortcuts' section with a list: 'Applicant FTP', 'Local Folders', and 'Public Folder'. The lower pane shows the path 'D:\Business\Public' and a table of files:

Name	Size	Datetime	Status	Versions	Author
Q-INTSEC0001.pdf	82 KB	09.06.2017 12:21	Team	1	William McSun

The window contains two horizontal panes. The upper pane shows the folder tree for the selected applicant's folder and the content of the currently selected sub-folder. The pane underneath allows you to open shortcuts. Clicking any of the **Shortcuts** will create a second field to the right, and open the appropriate folder there. This allows you to simultaneously work with two opened folders in the same window.

Files can be exchanged between the applicant folder and external resources (local folders, FTP) via the two **Copy** buttons.

- is used to copy files from the path currently open in the Shortcuts pane to the applicant folder .
- is used to copy files from the applicant folder to the path currently open in the Shortcuts pane.

The context menu contains the following specific file operations:

The **Open** command opens the file in the appropriate application

The **Upload** command uploads the file from the local *Business* folder to the *BusinessServer* folder on the Server.

**Download** can be used to download the file in the *BusinessServer* folder on the Server to the *Business* folder on the Workstation PC.

**Download version** opens a window that contains information about all versions of a particular file.

Each file can have one of the following statuses:

- Team** - the files stored in the *BusinessServer* folder on the server and in local storage are identical.
- Team - Changed on Workstation** - the local copy of the file has been modified, the file on the server has not been updated.
- Team - Changed on Server** - the file on the server has been modified, the local copy has not been updated.
- Team - Missing** - the file exists on the server, but has not been downloaded to the local PC yet (or has been deleted locally).
- Local** - the file exists locally, but has not been uploaded to the server yet (or has been deleted on the server).

# Applicant Window Info Tab

The **Info** tab of the **Applicant** window can be used to enter any additional information regarding the selected applicant in a plain text format. These notes will be available for all project managers.

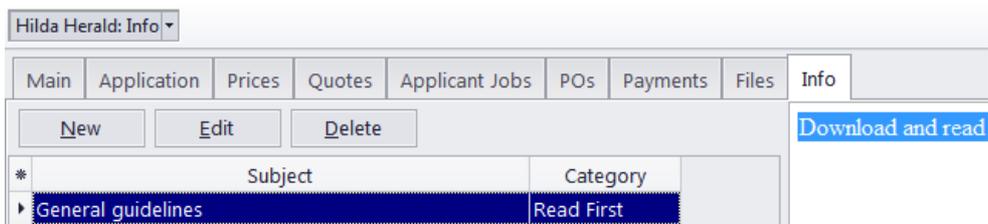
Each note has the following attributes:

**Subject** — can be maximum 100 characters long.

**Category** — to add more categories of notes, in the **Backstage** view click the **Current user** command, then click **Categories**.

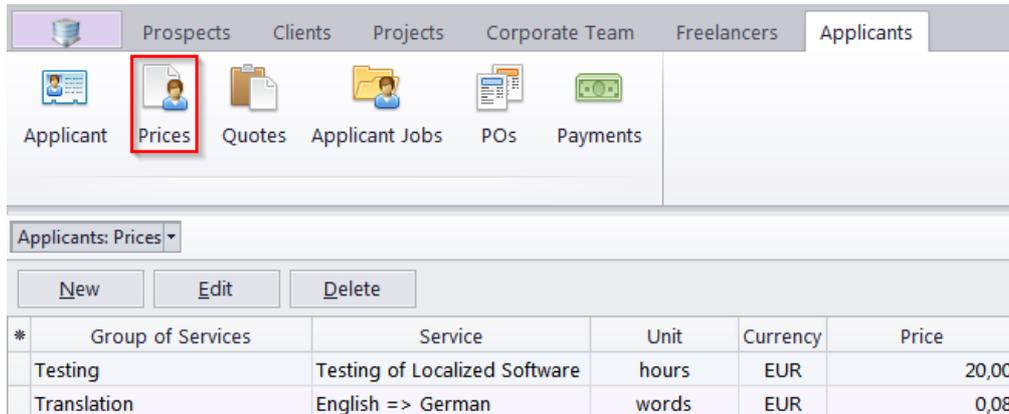
**Information** — a plain text note with no maximum length.

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



# Applicant Prices Window

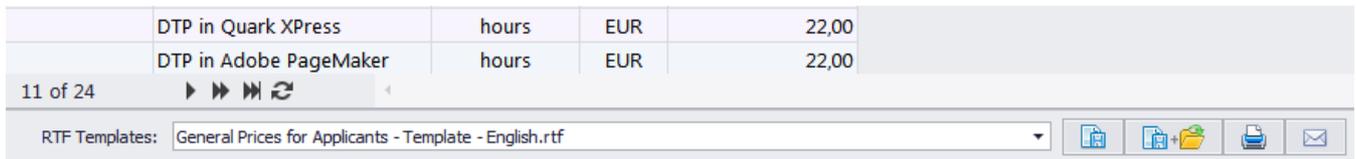
The **Applicant Prices** window contains your general *price list* for services offered by your applicants. These prices can be used when creating quotes any applicant in your database.



*	Group of Services	Service	Unit	Currency	Price
	Testing	Testing of Localized Software	hours	EUR	20,00
	Translation	English => German	words	EUR	0,08

Use the **New/Edit/Delete** buttons to manage the prices here.

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



	DTP in Quark XPress	hours	EUR	22,00
	DTP in Adobe PageMaker	hours	EUR	22,00

11 of 24

RTF Templates: General Prices for Applicants - Template - English.rtf

You can *print* your general freelance services price list, save it in a text file or send it via e-mail by selecting the template and clicking the **Save**, **Save & Open**, **Print**, or **Send Mail** buttons at the bottom of the window.

To configure the price list templates, in the Backstage view click **Corporate Settings**, then click the **Templates** section. Templates for prices are stored in the *D:\BusinessServer\Templates\EXPERTS\APPLICANT\Prices* folder.

---

See also:

Prices Tab of Applicant Window

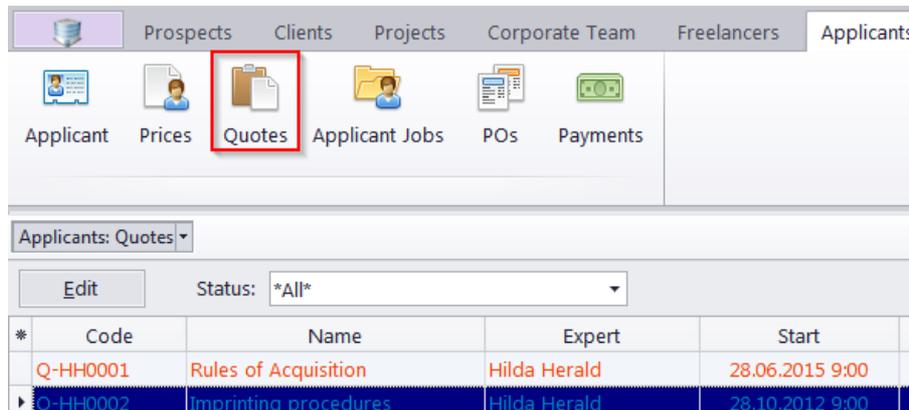
Managing price lists

# Applicant Quotes Window

The **Applicant Quotes** window provides an overview of all applicant quotes. The options available for this window are the same as those for the **Quotes** tab of the **Applicant** window. The major differences are:

- The **Applicant Quotes** window displays all quotes from applicants.
- New quotes cannot be created using this window.
- Existing quotes cannot be deleted using this window.

The **Status** filter drop-down list can be used to display only quotes with a certain status.



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

- **Blue** for unknown quote status
- **Green** for accepted quote status
- **Red** for rejected quote status
- **Purple** for received or corrected quote status

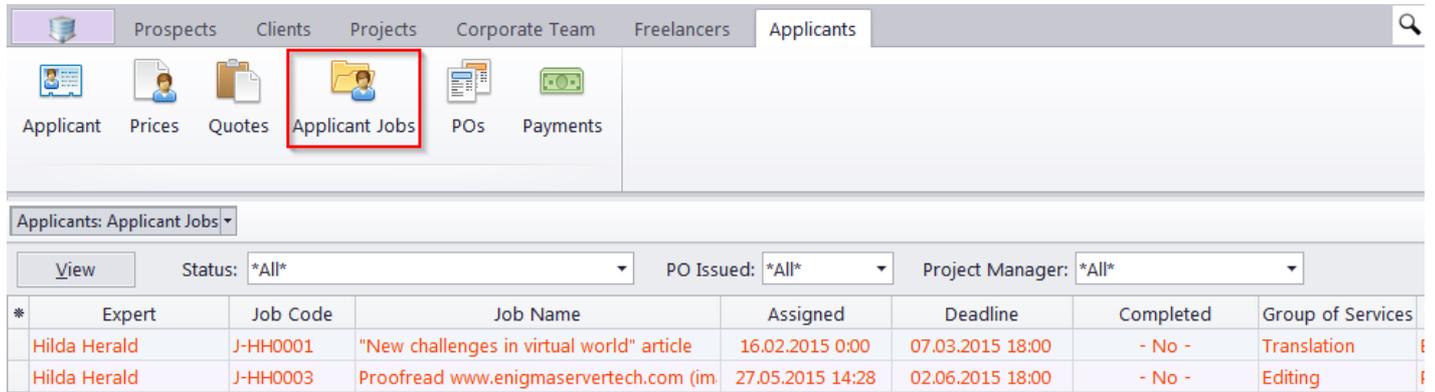
 **Note:** You can change colors on the **Colors: Status** tab of the **User Settings**.

See also:

Quotes Tab of Applicant Window

# Applicant Jobs Window

All jobs of former or inactive freelancers stored in the database are listed in the **Applicant Jobs** window. The options available for this window are the same as those for the **Applicant Jobs** tab of the **Applicant** window. The major difference is that the **Applicant Jobs** window displays all jobs of all former or inactive freelancers.



* Expert	Job Code	Job Name	Assigned	Deadline	Completed	Group of Services
Hilda Herald	J-HH0001	"New challenges in virtual world" article	16.02.2015 0:00	07.03.2015 18:00	- No -	Translation
Hilda Herald	J-HH0003	Proofread www.enigmaservertech.com (im	27.05.2015 14:28	02.06.2015 18:00	- No -	Editing

## Applicant Jobs Filters

Using the **Status** drop-down list you can view only jobs with a particular status: *vacant*, *not completed*, *due today* and so on.

Using the **PO Issued** drop-down list you can view only the jobs for which a purchase order was issued, jobs with no PO, or free jobs.

## Applicant Jobs statuses

The color of applicant jobs in the list is determined by their status. By default these are:

- **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*.
- **Black** — the job is *completed*.

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

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

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

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

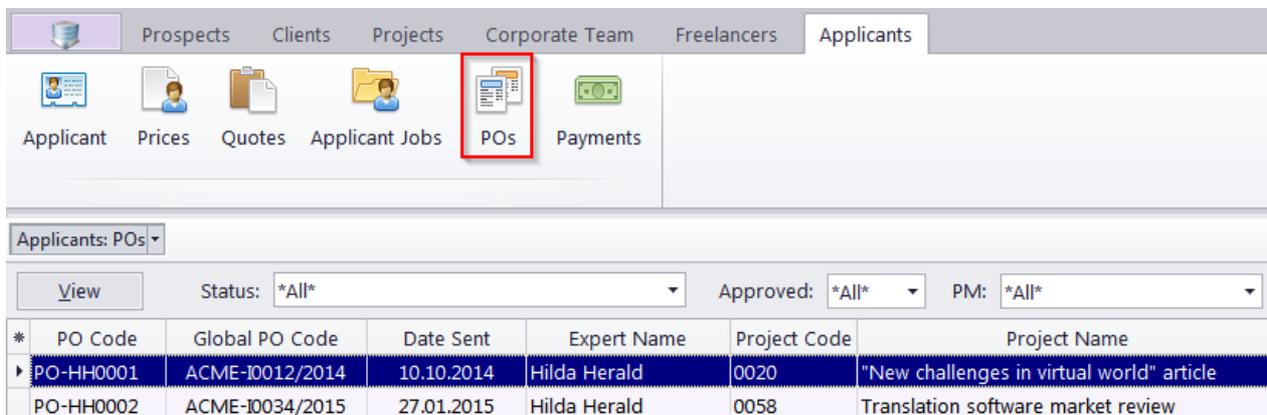
See also:

Applicant Jobs Tab of Applicant Window

# Applicant POs Window

The **Applicant POs** window provides a general list of all purchase orders issued to all former or inactive freelancers in the database.

The options available for this window are the same as those for the **POs** tab of the **Applicant** window. The major difference is that the **POs to Applicants** window displays all POs for all freelancers.



* PO Code	Global PO Code	Date Sent	Expert Name	Project Code	Project Name
PO-HH0001	ACME-I0012/2014	10.10.2014	Hilda Herald	0020	"New challenges in virtual world" article
PO-HH0002	ACME-I0034/2015	27.01.2015	Hilda Herald	0058	Translation software market review

## PO Statuses

Purchase order statuses change depending on your payment terms to former or inactive freelancers and payments to freelancers linked to purchase orders.

**Green** — the purchase order is *outstanding* and is expected *to be paid soon*.

**Blue** — the purchase order is *outstanding* and is expected *to be paid today*.

**Red** — the purchase order is *outstanding* and its *payment is overdue*.

**Black** — the purchase order has been *settled* (paid).

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

Projetex automatically assigns statuses to POs depending on each freelancer's payment terms.

## Filtering POs

Use the **Status** drop-down list to filter out only **Purchase Orders** with the selected status.

Use the **Approved** drop-down list to filter out **POs** which have or have not been approved by project managers.

---

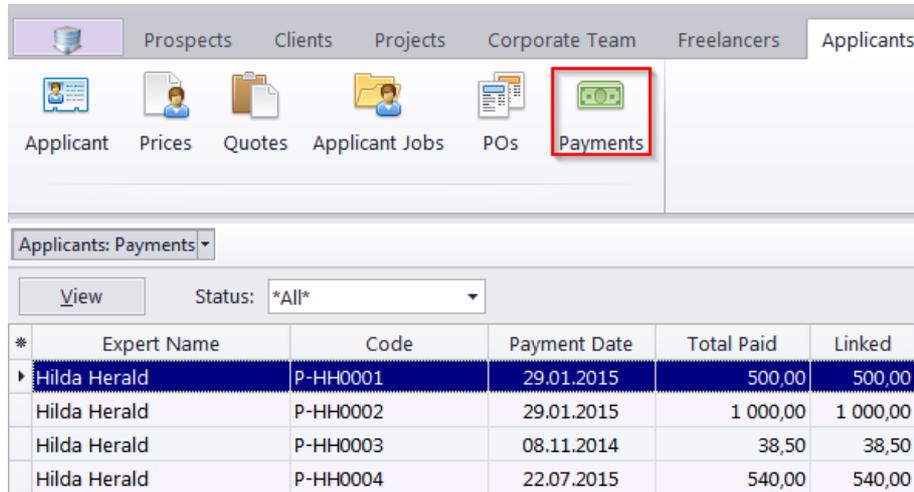
See also:

POs Tab of Applicant Window

# Applicant Payments Window

The **Applicant Payments** window displays all *payments* received from all former or inactive *freelancers*. This window can be used to calculate totals of all Payments to former or inactive freelancers in the base currency.

Use the **Status** filter drop-down list to display only payments with a particular status. Use this filter to view either the payments which are still to be linked with invoices or only the fully linked ones.



*	Expert Name	Code	Payment Date	Total Paid	Linked
▶	Hilda Herald	P-HH0001	29.01.2015	500,00	500,00
	Hilda Herald	P-HH0002	29.01.2015	1 000,00	1 000,00
	Hilda Herald	P-HH0003	08.11.2014	38,50	38,50
	Hilda Herald	P-HH0004	22.07.2015	540,00	540,00

---

See also:

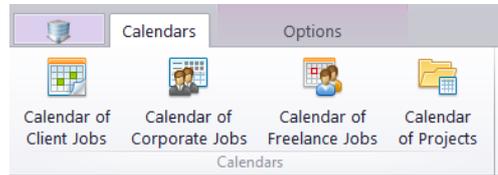
Payments Tab of Applicant Window

# The Calendar

The **Calendar** section displays all projects and jobs in the visual format of *calendar blocks*. Each block stretches across the calendar from assignment until completion, or until the deadline if the job/project has not been completed yet.

The section has four different calendars in it, accessible from the **Ribbon: Calendar of Projects, Calendar of Client Jobs, Calendar of Corporate Jobs, Calendar of Freelance Jobs**.

Each calendar displays the corresponding Jobs or projects for all clients. Double-clicking a calendar block opens the Edit window for the corresponding job or project.



## Settings for the Calendar view

The following settings for the calendar page are available after opening a calendar:

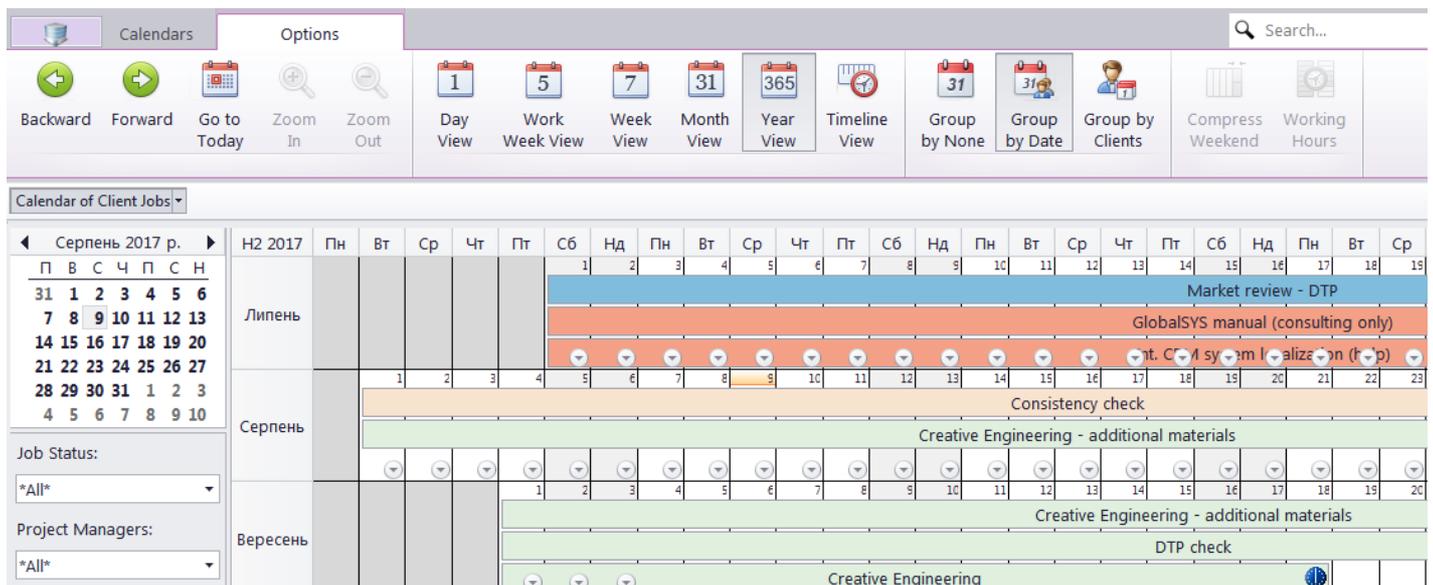
**Basic navigation** - the Ribbon displays icons for moving backward and forward in the calendar by a single interval, and quick navigation to Today.

**Viewed period** - the Ribbon displays icons for selecting the time interval to be viewed (day, work week, week, month, year), as well as the special Timeline View.

**Note:** In Day View and Work Week View, jobs shorter than one day are displayed across the rows representing hours, while longer jobs are displayed above the hour-rows.

**Grouping and special options** - the Ribbon displays icons for changing the layout of the viewed interval (**Group by None, Group by Date, Group by Clients/Experts**), and special options for Weekend or Off hours display.

**Mini-calendar** - the mini-calendar on the left displays the month and date currently viewed. Click a date to switch to it. To move to a different month, click the greyed-out dates, the Back and Forwards buttons in the month header, or the header itself. Click a day and drag to view all days selected this way.



## Job/Project block colors

As well as the jobs/projects they represent, job/project calendar bars can have different colors, depending on the statuses of respective jobs/project:

- Green** — the job/project is *not completed* yet, but its *deadline is in the future*.
- Blue** — the job/project is *not completed* and *due today*.
- Red** — the job/project is *not completed* and *overdue* (its deadline is in the past).
- Grey** — the job/project is *canceled*.
- Pale Pink** — the job/project is *completed*.
- Pale green** — the job/project is *Heads-Up*.
- Pale Orange** — the job/project is *On Hold*.

**Note:** To customize status colors, in the **Backstage** view select the **User Settings** section, then click **Colors: Status**.

## Filtering Calendars

Use the **Job Status** filter to display only projects/jobs with a certain status: *vacant, completed, not completed, due today, overdue,* and so on.

Use the **Project Manager** filter to display only jobs/projects led by certain *Project Managers*.

---

See also:

[Calendar Icons](#)

# Static Reports

Static report templates are found in all tabs of the **Reports** section, except the 3D tab.

Each icon opens a specific template and automatically loads the required information into it before displaying it on screen.

Many reports require you to Select Conditions - choose the specific information to be entered into the template (e.g. a specific client, expert, or time interval).

Static reports are displayed in a "ready to print" page-by-page view and the controls just above the displayed report allow you to navigate the pages more easily and adjust their dimensions.



**Print** - sends the report as it is shown to the printer.

**Page settings** - allows you to adjust the dimensions, orientation and margins of the pages of the displayed report. Applying the changes often requires re-selecting display conditions.

**Thumbnails** - toggles a sidebar that displays thumbnails of all the pages in the displayed report.

**Zoom Controls** - set the portion of the reports visible on screen at a time.

**Page navigation** - Quickly switch between adjacent pages, or jump to the start or end of the report.

**Refresh** - generate the report again to choose different conditions or keep the report up to date with the database.

New custom report templates will appear in the Custom tab.

---

See also:

[Reports Icons](#)

[Report Settings](#)

[Dynamic Reports](#)

# Dynamic Reports

The 3D tab gives access to a number of dynamic reports: sets of fields that can be dragged and dropped onto a special "Pivot Grid" to quickly create an exportable report table.

		2015		2014	
Client	Payments	Total (EUR)	Payments	Total (EUR)	
Cyber Computa...	3	6400,00			
Definition Desi...	2	4158,00	4	2952,18	

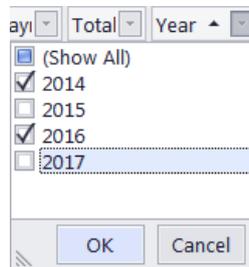
## Prefilter

Use the prefilter to decide which information to include in the report to begin with. Click the **Prefilter** button to bring up the Filter Builder.

## Pivot Grid

The pivot grid is the framework into which the fields can be dragged to customize the table.

Click the down arrow button in a field to select the entries which will factor into the report by the values of that field.



The grid consists of five areas:

- The Field List contains the fields that are not displayed in the main window. Right-click a field and select **Hide** to send it to the Field List. Display the Field list by right-clicking just above the table and selecting "Show Field List".
- Fields in the Filter Area (red box) do not appear in the table. but can be used for quick filtering.
- Fields in the Data Area (blue box) display their values in the cells of the table. If there is more than one field in the Data Area, they appear as sub-columns of the field in the Column Area.
- Fields in the Column Area (green box) split the data into columns according to their values. If there is more than one field in the Column Area, the columns are grouped with a left-to-right hierarchy and can be expanded or collapsed by clicking the arrow next to the left field's value.
- Fields in the Row Area, (yellow box) split the data into rows according to their values. If there is more than one field in the Row Area, the rows are grouped with a left-to-right hierarchy and can be expanded or collapsed by clicking the arrow next to the left field's value.

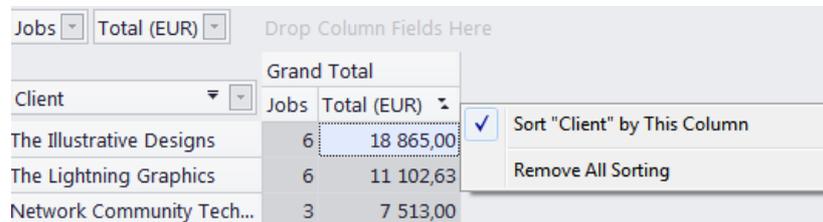
		2016			
Client	Jobs	Total (EUR)	Jobs	Total (EUR)	Jobs
Cyber Computation T...	1	750,00			
Definition Designs					

# Sorting

By default, the table is sorted by the fields in the Row and Column Areas. Click the fields to switch between ascending and descending sorting.

You can also sort the table by the value of a specific row or column by right-clicking the column's header and selecting **Sort... by This Row/Column**.

Select **Remove All Sorting** to return to the default sorting method.



The screenshot shows a report table with a context menu open over the 'Total (EUR)' header. The table has columns for 'Jobs' and 'Total (EUR)'. The rows are 'The Illustrative Designs', 'The Lightning Graphics', and 'Network Community Tech...'. The context menu has two options: 'Sort "Client" by This Column' (checked) and 'Remove All Sorting'.

Client	Jobs	Total (EUR)
The Illustrative Designs	6	18 865,00
The Lightning Graphics	6	11 102,63
Network Community Tech...	3	7 513,00

---

See also:

[Reports Icons](#)

[Report Settings](#)

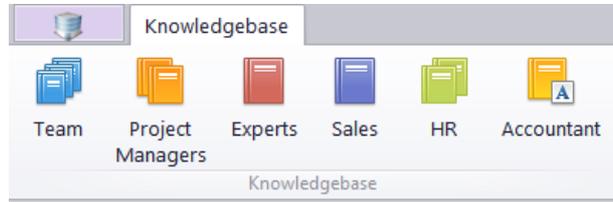
[Static Reports](#)

# The Knowledgebase

The **Knowledgebase** acts as a repository for internal guides, manuals, and other reference documentation.

Projetex comes with six built-in knowledgebases: **Team**, **Project Managers**, **Experts**, **Sales**, **HR**, and **Accountants**.

The Team knowledgebase is meant to be visible to all users, while the others are meant to be visible only to users in corresponding roles and to administrators.



Each knowledgebase is separated into two tabs: **Info**, which gives access to reference topics and articles, and **Files**, which gives access to the file storage folder of the knowledgebase.

---

See also:

[Knowledgebase Icons](#)

[Knowledgebase Info Tab](#)

[Knowledgebase Files Tab](#)

# Knowledgebase Info Tab

The **Info** tab of the Knowledgebase consists of two panes.

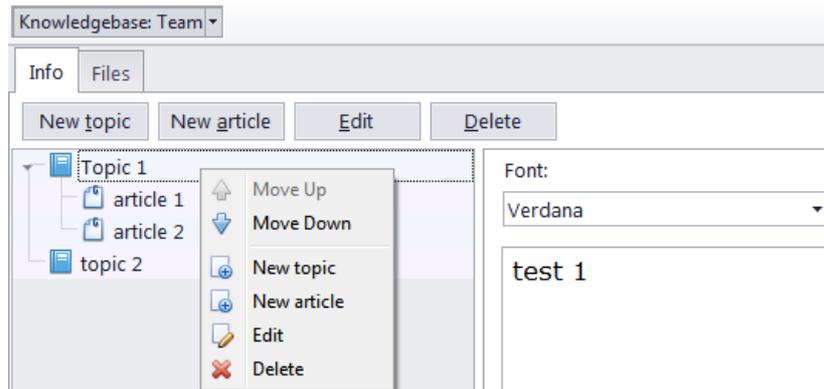
The left pane displays all the topics and articles in the knowledgebase, and the right pane displays the contents of the currently selected topic or article.

**New Topic** creates a new topic in the knowledgebase.

**New Article** creates a new child article in the selected topic.

**Edit** allows the user to change the Subject and Information in the selected topic or article. Note that the information can also be edited directly in the right pane.

**Delete** removes the currently selected topic or article. note that a topic can not be deleted if it has at least one article inside it.



Click the arrow next to the topic symbol to display or hide the articles inside the topic.

To move a topic up or down in the knowledgebase, or to move an article inside it's topic, right-click and select **Move Up** or **Move Down**.

You can also apply basic formatting to the contents of a topic or article (font, size, style, color, etc.) and paste images into it.

---

See also:

[Knowledgebase Icons](#)

[Knowledgebase Files Tab](#)

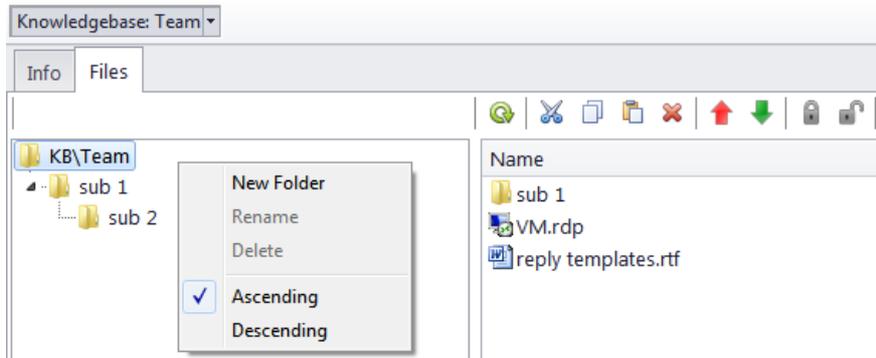
# Knowledgebase Files Tab

Every knowledgebase has a dedicated folder where all useful reference files can be stored.

By default, the knowledgebase folders are found in C:\BusinessServer\KB for the server and C:\Business\KB for the workstations.

The Files tab allows for easy management of such files. The tab shows the folder tree for the selected knowledgebase and the content of the currently selected sub-folder.

New subfolders can be created by right-clicking any existing folder in the tree view and selecting "New folder".



The context menu contains the following specific file operations:

The **Open** command opens the file in the appropriate application

The **Upload** command uploads the file from the local *Business* folder to the *BusinessServer* folder on the Server.

**Download** can be used to download the file in the *BusinessServer* folder on the Server to the *Business* folder on the Workstation PC.

**Download version** opens a window that contains information about all versions of a particular file.

Each file can have one of the following statuses:

**Team** - the files stored in the *BusinessServer* folder on the server and in local storage are identical.

**Team - Changed on Workstation** - the local copy of the file has been modified, the file on the server has not been updated.

**Team - Changed on Server** - the file on the server has been modified, the local copy has not been updated.

**Team - Missing** - the file exists on the server, but has not been downloaded to the local PC yet (or has been deleted locally).

**Local** - the file exists locally, but has not been uploaded to the server yet (or has been deleted on the server).

---

See also:

Knowledgebase Icons

Knowledgebase Info Tab

# Database Server Tab

The **Database Server** tab of the Projetex Server Administrator provides general information on the Microsoft SQL server used by Projetex, as well as some basic server options.

Database Server Database Corporate Settings

Status:  
**ON**

Location:  
**WIN7PC [10.10.0.100]**

Version:  
**Microsoft SQL Server 2014 - 12.0.2000.8 (Intel X86)  
Feb 20 2014 19:20:46  
Copyright (c) Microsoft Corporation  
Express Edition on Windows NT 6.1 <X64> (Build 7601: ) (WOW64)**

Stop Server

© Advanced International Translations, 1999-2016. All Rights Reserved.

Upgrade **Version: 15.0.2 Build 58**

**Status:** By default the status of the Microsoft SQL server is ON immediately after installation. Each time you boot (or reboot) Windows®, the Microsoft SQL Database Server starts automatically.

**Note:** The Projetex Server Administrator is only a management tool, which can be used to control and monitor the Microsoft SQL Database Server. The Projetex Server Administrator is not the server itself. This means that the Projetex Server Administrator application can be closed, and it will not influence the status of the Server itself, unless you explicitly stop or start it.

**Location:** In Projetex, the server's location is always **localhost**, which means that the Microsoft SQL Database Server is running on the same PC, on which the Projetex Server Administrator is installed.

**Version:** The version of the Microsoft SQL Database Server, installed together with the Projetex Server Administrator.

It is not recommended to install newer versions of the Microsoft SQL Database Server unless there is an explicit recommendation to do this from Projetex Support. We will thoroughly test all future versions of Microsoft SQL, their proper functioning with Projetex Server and Workstation software, and will consider all pros and cons before recommending an upgrade. Voluntary upgrades may cause unstable operation of Projetex.

**Register/Upgrade:** You can register Projetex or upgrade your Projetex license clicking the **Register/Upgrade** button. Also, current **version** of *Projetex Server* is displayed in this field.

---

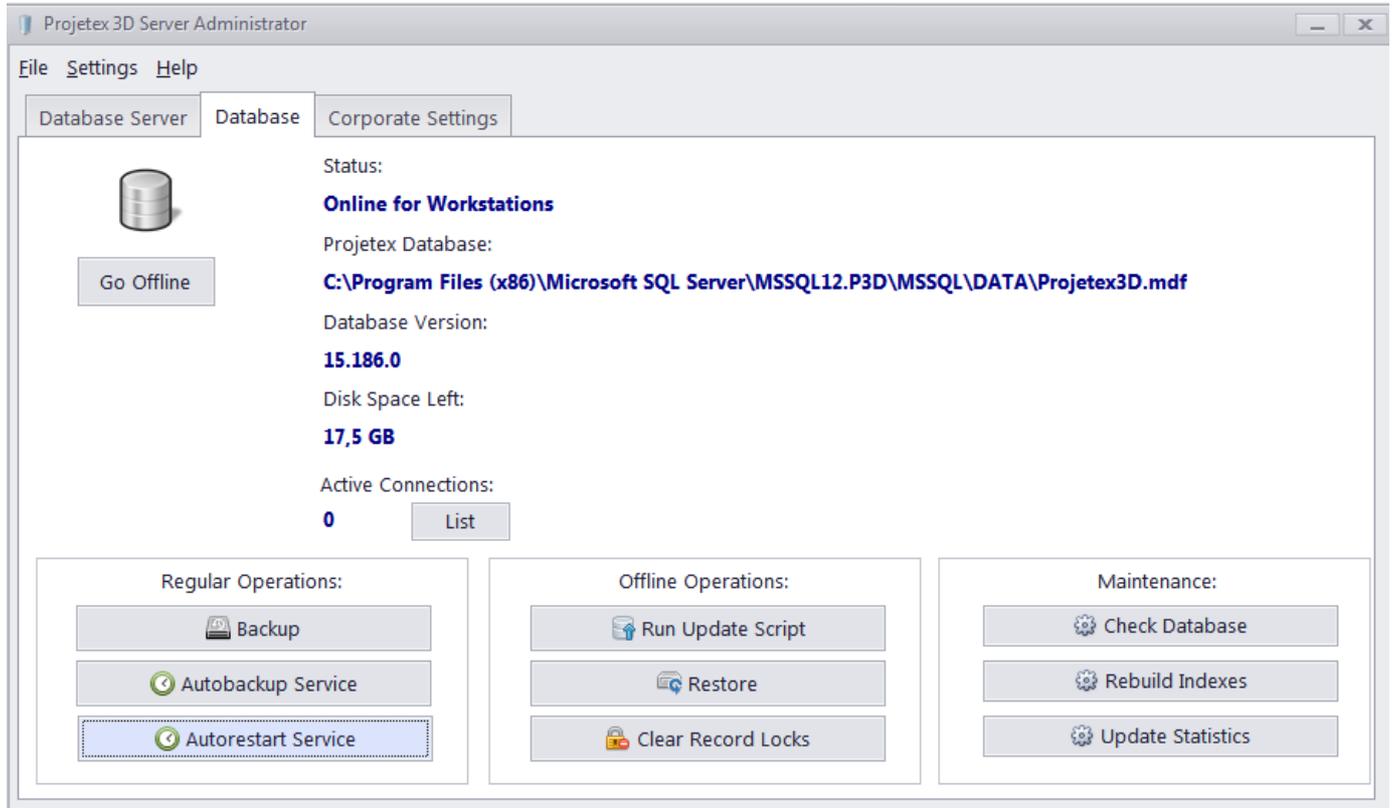
See also:

Starting and Stopping the Database Server

Database Tab

Server Corporate Settings

# Database Tab



The Projetex database can be in one of the following states:

- **Online for Workstations** — Workstations can connect to the Projetex Server and work with the database. This is the status for regular operation.
- **Offline for Workstations** — access to the database for Projetex Workstations is restricted, and the database can only be accessed with the Projetex Server Administrator application. This status must be set before any database maintenance operations, (such as **Clear Locks**, or **Run Update Script**) and changing the settings on the **Corporate Settings** tab of the Server Administrator (such as creating custom fields, custom reports, changing folder structure, etc.).

The *Current database status* is displayed in the **Status** string. Click **Go Online** or **Go Offline** to switch the database status.

The **Active Connections** string displays the number of current Projetex Workstation connections to this database.

The **Projetex Database** string displays the full path to the Projetex database file, which is normally located at *C:\Program Files (x86)\Microsoft SQL Server\MSSQL12.P3D\MSSQL\DATA\Projetex3D.mdf*

The **Database Version** string displays the version of the currently used database.

The **Disk Space Left** string shows the amount of free space left on the hard drive, on which the Projetex database is located.

---

See also:

Database Server Tab

Server Corporate Settings

Switching the database offline or online

Backup

Auto-backup Service

Autorestart Service

Restore

Run Update Script

Clear Record Locks

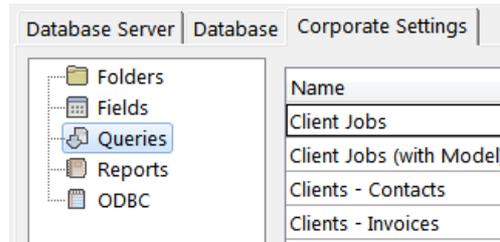
Maintenance Operations

View Online Users

# Server Corporate Settings

The following **Corporate Settings** are available in the Projotex Server Administrator:

- Folders — Settings for folder creation automation.
- Fields — Creation and modification of company-wide custom database fields for clients, prospects, projects, corporate experts, freelancers, applicants and corporate expenses.
- Queries — Create custom queries to retrieve necessary data out of the database.
- Reports — Create custom reports to fit your reporting needs and requirements.
- ODBC — Set the password for access to the database via ODBC



---

See also:

[Database Server Tab](#)

[Database Tab](#)

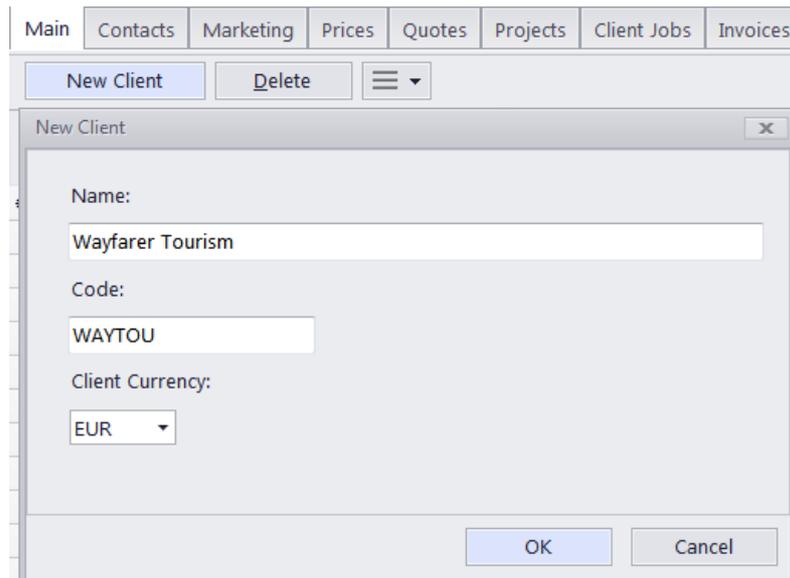
# Adding/Editing Client/Prospect Profile

To create a new Client or Prospect record in Projetex:

1. Click the **New Client/New Prospect** button above the **Client/Prospect** list on the **Main** tab of the **Client/Prospect** window.

2. Fill the following fields:

- Enter the client's name in the **Name** text field.
- Enter a code for the client record in the **Code** text field (12 symbols maximum) or wait for the program to generate the code automatically (it will usually contain the first letters of the **Name** in this case).
- Select the **Client Currency** using the corresponding drop-down list.
- Click **OK** to confirm or **Cancel** to discard the entered information.



The screenshot shows the 'New Client' dialog box in the Projetex application. The dialog box is titled 'New Client' and has a close button (X) in the top right corner. It contains three input fields: 'Name' with the value 'Wayfarer Tourism', 'Code' with the value 'WAYTOU', and 'Client Currency' with a dropdown menu showing 'EUR'. At the bottom of the dialog box, there are two buttons: 'OK' and 'Cancel'. The dialog box is overlaid on a window titled 'Main' which has several tabs: 'Main', 'Contacts', 'Marketing', 'Prices', 'Quotes', 'Projects', 'Client Jobs', and 'Invoices'. The 'New Client' button is highlighted in the 'Main' tab.

3. Click the appropriate buttons in the client or prospect profile to enter the **Postal Address**, **Project Managers** (Client only), **Contact Info**, **Web links**, **Payment terms**, **VAT number**, **Invoicing policy**, **Next Codes** (Client only), **FTP connections** and **General Information**.

---

See also:

[Converting Between Prospect and Client](#)

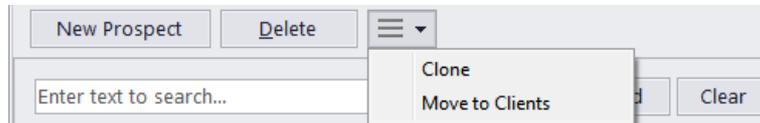
[Cloning a Client/Prospect](#)

# Converting Between Prospect and Client

When a deal with a prospective client is struck, convert their Prospect profile into a Client profile.

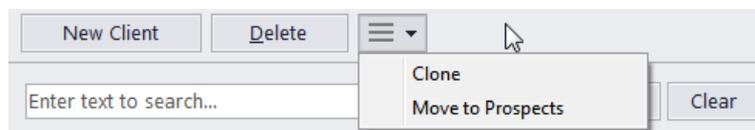
Select the profile in the Main tab of the Prospect window, click **More...** and select **Move to Clients**.

The profile and all accompanying table entries will be transferred into the Clients database, and all files will be moved into appropriate folders automatically.



If you no longer actively work with a client, you can convert their Client profile into a Prospect profile in the same manner from the Main tab of the Client window.

All the former client's Invoices, Jobs and other documentation will be safely stored in the Prospects database for reference purposes.



---

See also:

[Adding/Editing Client/Prospect Profile](#)

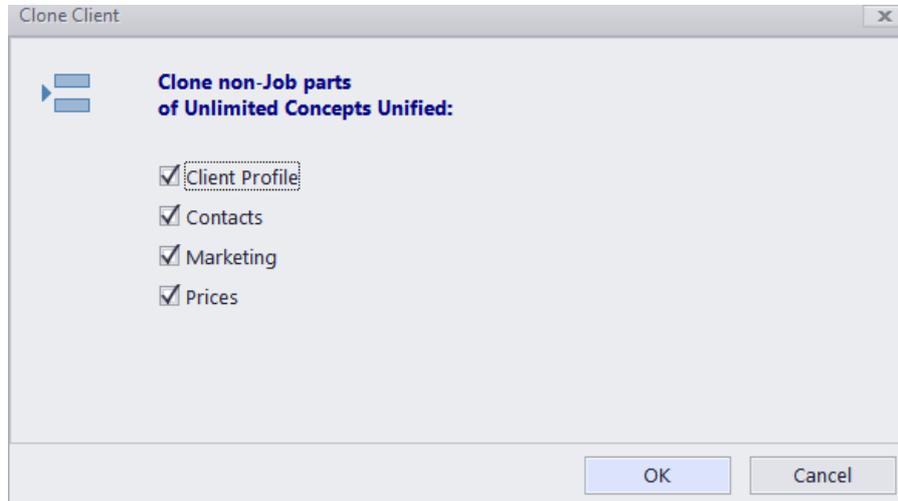
[Cloning a Client/Prospect](#)

# Cloning a Client/Prospect

In case the client or prospect you are about to create, has the same or similar data as one of the existing clients or prospects, the client/prospect cloning option can be used to copy selected data from an existing client/prospect to a new one.

To clone a client:

1. Open the **Main** tab of the **Client/Prospect** window.
2. Select a client/prospect to clone.
3. Click the **More...** button and select **Clone**.



The following data can be copied:

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

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

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

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

 **Note:** To disable cloning of some information mentioned above, deselect the appropriate checkboxes after you pressed the **Clone** button.

---

See also:

[Adding/Editing Client/Prospect Profile](#)

[Converting Between Prospect and Client](#)

# Adding/Editing Contacts of Client/Prospect

A client can have a number of contacts. Each contact has their own contact details, and can be assigned as a "client PM" to this client's projects. The contacts of a client can be also put into the attention field of the client's invoices.

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

The following data can be added to a contact profile:

**Photo** — up to 110x120 pixels. Click the frame to either **Load** a photo from a file or click **Assign from Camera** to take a picture with a camera connected to the machine. The following formats can be used: .JPG, .JPEG, .BMP (bitmap), .GIF (Graphics Interchange Format).

**Salutation** — select one of the salutations, which can be managed in the **Administrator > Salutations** window in the **Backstage** view. This salutation can then be automatically displayed on all printable documents next to this contact's name.

**Name** — maximum 80 characters.

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

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

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

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

See also:

Contacts Tab of Client Window

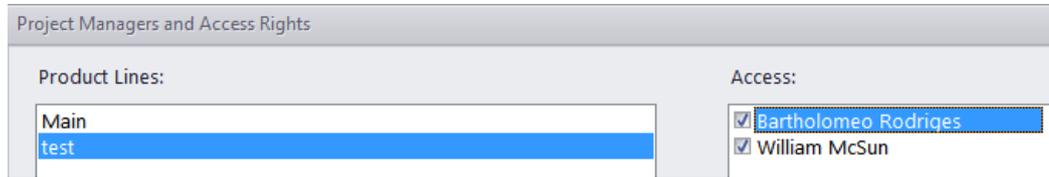


# Assigning Product Line Project Managers

To assign or remove a product line project manager, you need to have production manager access rights.

Click "**Project managers**" on the client profile.

Select the product line you wish to alter access rights for, and check or uncheck the employees you wish to assign or remove as product line project managers for it.



The screenshot shows a dialog box titled "Project Managers and Access Rights". It is divided into two main sections: "Product Lines" and "Access".

- Product Lines:** A list box containing "Main" and "test". The "test" item is currently selected and highlighted in blue.
- Access:** A list box containing two entries, each with a checked checkbox:
  - Bartholomeo Rodrigues
  - William McSun

---

See also:

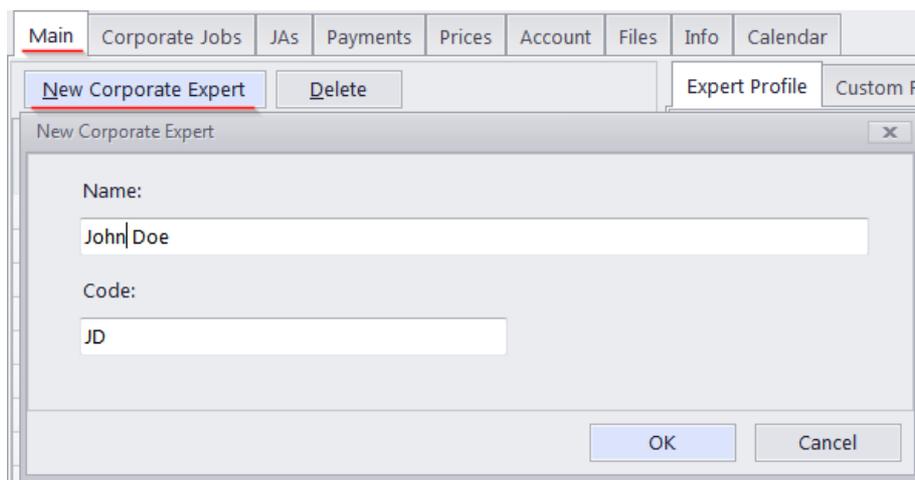
[Client Product Lines](#)

[Product Line Project Managers](#)

# Adding/Editing Experts and Applicants

## Adding corporate experts

1. Click the **New Corporate Expert** button on the **Main** tab of the **Corporate Experts** window.
2. Fill the following fields in the **New Corporate Expert** dialog:
  - Enter a name of the corporate expert in the **Name** text field.
  - Enter the code for the expert record in the **Code** text field (12 symbols maximum) or wait for the program to generate the code automatically (it will usually contain the first letters of the **Name** in this case).
  - Click **OK** to confirm or **Cancel** to discard the entered information.
3. Click the appropriate buttons in corporate expert profile to enter the **Contact Info**, **Next Codes**, **AHC** (average hourly cost) **FTP connections**, and **General Information**.



The screenshot shows a software window with a menu bar containing 'Main', 'Corporate Jobs', 'JAs', 'Payments', 'Prices', 'Account', 'Files', 'Info', and 'Calendar'. Below the menu bar is a toolbar with 'New Corporate Expert' and 'Delete' buttons. The 'New Corporate Expert' dialog box is open, showing a 'Name:' field with 'John Doe' and a 'Code:' field with 'JD'. The dialog has 'OK' and 'Cancel' buttons at the bottom.

## Adding freelancers

1. Click the **New Freelancer** button on the **Main** tab of the **Freelancers** window.
2. Fill the following fields in the **New Freelance Expert** dialog:
  - Enter a name of a freelancer in the **Name** text field.
  - Enter the code for the freelancer record in the **Code** text field (12 symbols maximum) or wait for the program to generate the code automatically (it will usually contain the first letters of the **Name** in this case).
  - Select the **Expert Currency** using the corresponding drop-down list.
  - Click **OK** to confirm or **Cancel** to discard the entered information.
3. Click the appropriate buttons in the freelancer profile to enter the **Postal Address**, **Contact Info**, **Web links**, **Payment Terms**, **VAT number**, **Expert Status**, **Next Codes**, **Locale Format**, **FTP connections**, and **General Information**.

The screenshot shows a software window with a tabbed interface. The 'Main' tab is active. Below the tabs are buttons for 'New Freelancer', 'Search', 'Delete', and 'Move to Applicant'. A dialog box titled 'New Freelancer Expert' is open, containing the following fields:

- Name: John Doe
- Code: JD
- Expert Currency: EUR

Buttons for 'OK' and 'Cancel' are located at the bottom right of the dialog.

## Adding applicants

1. Click the **New Applicant** button on the **Main** tab of the **Applicants** window.

2. Fill the following fields in the **New Applicant** dialog:

- Enter the applicant's name in the **Name** text field.
- Enter the code for the record in the **Code** text field (12 symbols maximum) or wait for the program to generate the code automatically (it will usually contain the first letters of the **Name** in this case).
- Select the **Expert Currency** using the corresponding drop-down list.
- Click **OK** to confirm or **Cancel** to discard the entered information.

3. Click the appropriate buttons in the applicant profile to enter the **Postal Address**, **Contact Info**, **Web links**, **Payment Terms**, **VAT number**, **Expert Status**, **FTP connections**, and **General Information**.

The screenshot shows a software window with a tabbed interface. The 'Main' tab is active. Below the tabs are buttons for 'New Applicant', 'Delete', and 'Move to Freelancer'. A dialog box titled 'New Applicant' is open, containing the following fields:

- Name: John Doe
- Code: JD
- Expert Currency: EUR

Buttons for 'OK' and 'Cancel' are located at the bottom right of the dialog.

---

See also:

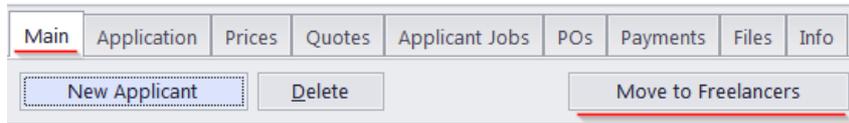
[Converting Between Applicant and Freelancer](#)

# Converting Between Applicant and Freelancer

When a deal with an applicant for freelance work is struck, convert their Applicant profile into a Freelancer profile.

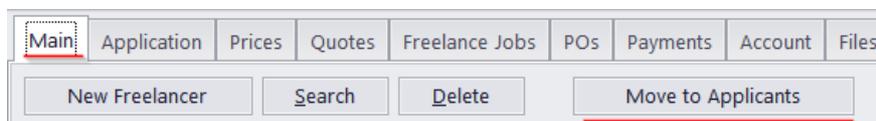
Select the profile in the Main tab of the Applicant window, and click **Move to Freelancers**.

The profile and all accompanying table entries will be transferred into the Freelancers database, and all files will be move into appropriate folders automatically.



If you no longer actively work with a freelancer, you can convert their Freelancer profile into an Applicant profile in the same manner from the Main tab of the Freelancer window.

All the former freelancer's POs, Jobs and other documentation will be safely stored in the Applicants database for reference purposes.



---

See also:

[Adding/Editing Experts and Applicants](#)

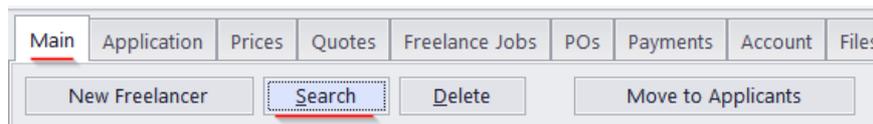
# Searching for freelancers

When selecting a freelancer or freelancer team for a job, you can use the freelancer database's Search function to quickly find freelancers with appropriate skills and/or prices.

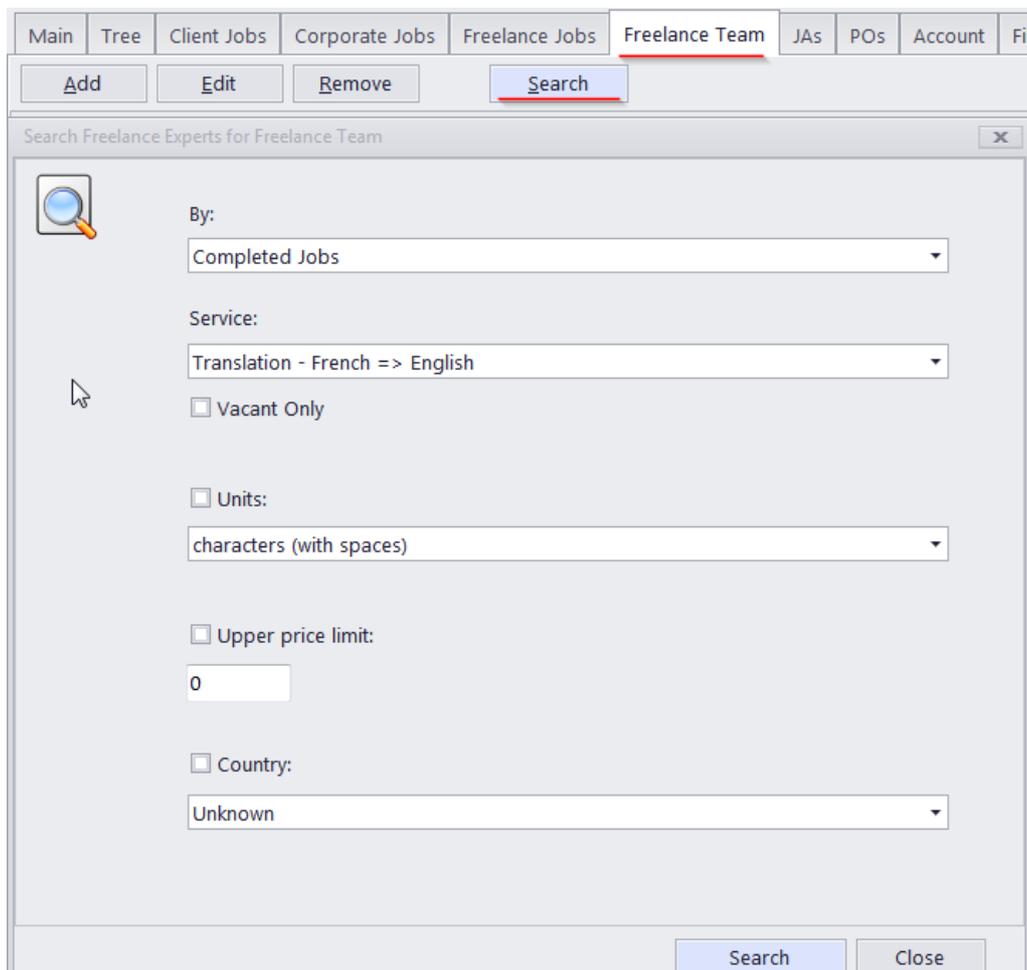
*Freelance search* in Projetex can be done either by services included in freelancer price lists or by jobs types completed by freelancers. This includes *languages*, since services can employ language pairs. Since prices are tied to services, searching by price employs both search by language pairs and by rates.

The following search options are available:

The **Basic search**, which can be conducted on the **Main** tab of the **Freelancer** window. Click the **Search** button over the list of the freelancers. This search is intended for quick browsing through long lists of freelancers.



The **Freelance team search** — when creating a group of freelancers for a specific project. To search freelancers for a freelance team, open the **Project** window, select the required project and click the **Freelance Team** tab. Click the **Search** button to begin searching for freelancers to include in this team.



The main difference between the *basic search* and *freelance team search* functions is that experts found via *freelance team search* can be added to the freelance team, while *basic search* simply allows quick browsing of the found freelancer data with an option to jump to any expert's profile.

Controls for the **Search Freelance Experts** window are identical in both cases.

**By** — selects the type of search. Selecting **Prices** will make Projetex search for freelance expert by the prices entered their individual price lists. Selecting **Completed Jobs** will make Projetex search for freelancers by the freelance jobs they completed. See the Freelancer Window Prices tab and Freelance jobs tab topics for details.

**Service** — items in this drop-down list represent combinations of service groups and services present in the database.

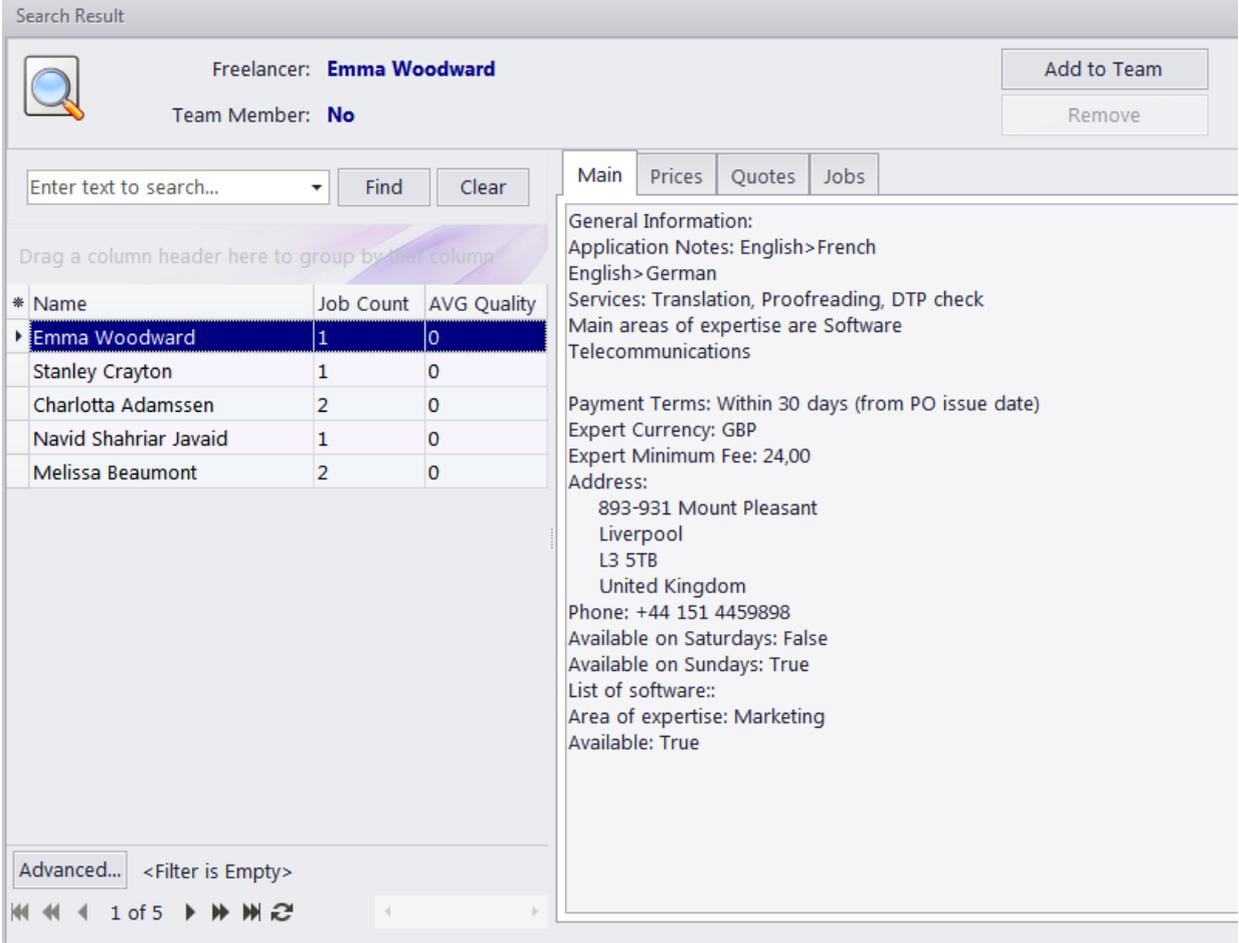
Selecting the **Vacant Only** check box (available for *freelance team search* only) will filter the services in the list leaving only those corresponding to vacant freelance jobs in the currently selected project.

**Units** — if the search is conducted *by completed jobs*, this parameter is optional.

**Upper price limit** — entering the *upper price limit* will limit the search to those freelancers whose price lists, or prices set in freelance jobs for the selected service are lower or equal than the upper price limit.

**Country** — this field adds a search criteria by the country in the Postal address of freelancer.

The search result window provides the following information about freelance translators, which matched the search criteria: *Freelancer name, prices, general information, quotes and job history.*



Search Result

Freelancer: **Emma Woodward** Add to Team

Team Member: **No** Remove

Enter text to search... Find Clear

Drag a column header here to group by that column

* Name	Job Count	AVG Quality
▶ Emma Woodward	1	0
Stanley Crayton	1	0
Charlotta Adamssen	2	0
Navid Shahriar Javaid	1	0
Melissa Beaumont	2	0

Advanced... <Filter is Empty>

1 of 5

Main | Prices | Quotes | Jobs

General Information:  
Application Notes: English>French  
English>German  
Services: Translation, Proofreading, DTP check  
Main areas of expertise are Software  
Telecommunications

Payment Terms: Within 30 days (from PO issue date)  
Expert Currency: GBP  
Expert Minimum Fee: 24,00  
Address:  
893-931 Mount Pleasant  
Liverpool  
L3 5TB  
United Kingdom  
Phone: +44 151 4459898  
Available on Saturdays: False  
Available on Sundays: True  
List of software::  
Area of expertise: Marketing  
Available: True

It is possible to introduce additional search parameters using the **Local Custom Filter** at the bottom of the **Freelance search** window.

See also:

Main Tab of Freelancer Window

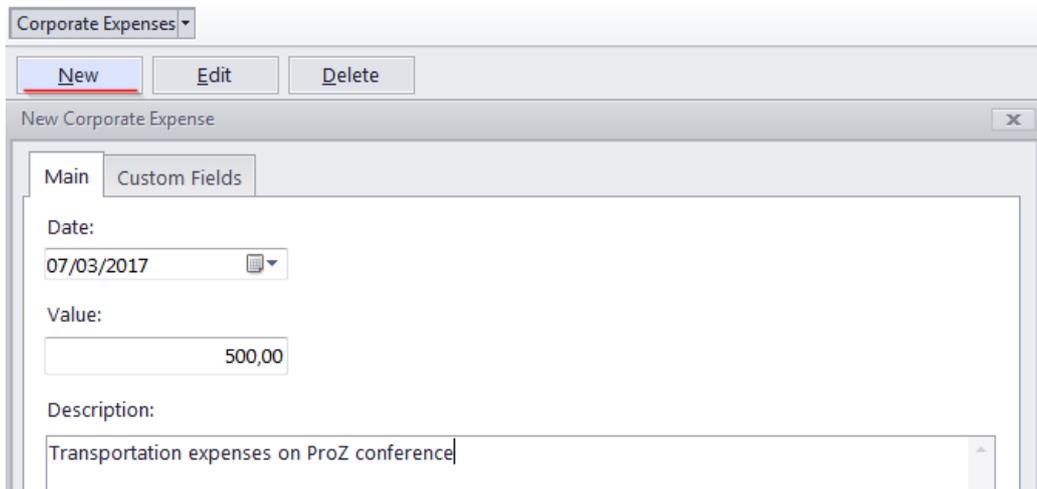
Freelance Team Tab of Project Window

# Creating Corporate Expenses

All corporate expenses information can be added or changed in the **Edit Corporate Expense** window.

To add a corporate expense:

1. Click the **Corporate Team** tab of the Ribbon.
2. Click the **Corporate Expenses** icon.
3. Click the **New** button.



The screenshot shows a software window titled "Corporate Expenses" with a ribbon containing "New", "Edit", and "Delete" buttons. Below the ribbon is a "New Corporate Expense" dialog box. The dialog has two tabs: "Main" and "Custom Fields". The "Main" tab is selected and contains the following fields:

- Date:** A date picker showing "07/03/2017".
- Value:** A text input field containing "500,00".
- Description:** A text area containing "Transportation expenses on ProZ conference".

Corporate expense records contain the following data:

**Date** — this date is used by the global date filter. See the Global Date Filter topic for details.

**Value** — the amount of corporate expenses entered in the base currency. See the Base Currency topic for details on changing your base currency.

**Description** — a plain text note any number of characters long.

**Custom fields** — use the **Custom Fields** tab to fill any **Custom Fields** of the **Corporate Expenses table**, created in the Projex Server Administrator. See the Custom Fields topic for details.

---

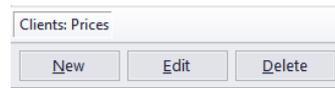
See also:

Corporate Expenses Window

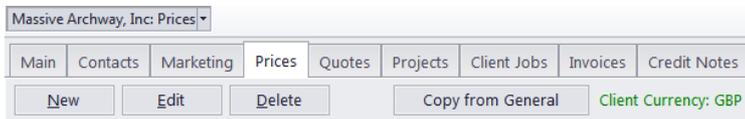
# Managing price lists

Price lists in Projetex 3d can be either general or individual.

The general price lists of clients and experts can be found in the **Clients/Prospects/Corporate Experts/Applicants/Freelancers: Prices** windows.



Individual prices can be accessed on the **Prices** tab of the **Client/Prospect/Corporate Expert/Freelancer/Applicant** window.



**Note:** clients and prospects share the same general price list, as do freelancers and applicants.

Use the **New/Edit/Delete** buttons to create, modify or delete prices

Use the **Save/Save&Open/Print/Send Mail** buttons to save, print, or e-mail a price list.



**Note:** To configure price list templates, in the **Backstage** view click **Corporate Settings**, then click **Templates**. Templates for prices are stored in the following folders: *D:\BusinessServer\Templates\CLIENTS\Prices\, ...\PROSPECTS\Prices\, ...\EXPERTS\FREELANCE\Prices, ...\EXPERTS\CORPORATE\Prices, ...\EXPERTS\APPLICANT\Prices.*

See also:

[Creating/Editing Prices](#)

[Copying Individual Prices to General Price List](#)

# Creating/Editing Prices

To add or edit a price, click the **New/Edit** button on the **Prices** tab of the **Client/Prospect/Corporate Expert/Freelancer/Applicant** windows to create/edit an individual price, or in the **Prices for Clients/Prospects/Corporate Experts/Applicants/Freelancers** windows to create/edit a general price.

The screenshot shows a software interface for editing prices. At the top, there's a window titled 'Clients: Prices' with three buttons: 'New', 'Edit', and 'Delete'. The 'Edit' button is highlighted with a red box. Below this is a dialog box titled 'Edit Price for Clients'. The dialog contains several fields: 'Group' is a dropdown menu with 'Translation' selected; 'Service' is a dropdown menu with 'English => German' selected; 'Units' is a dropdown menu with 'words' selected; 'Price' is a text input field containing '0,12' with '(per unit)' next to it; and 'Currency' is a dropdown menu with 'EUR' selected. At the bottom right of the dialog are 'OK' and 'Cancel' buttons.

Prices in Projetex 3D have the following parameters:

**Group** - you can select any of the groups of services available. To add or edit a group of services please open **Corporate Settings** in the **Backstage** view, and select the Groups of Services section.

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

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

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

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

---

See also:

[Copying Individual Prices to General Price List](#)

[Managing Services](#)

[Managing Volume Units](#)

# Copying Individual Prices from General Price List

Client, corporate expert and freelancer prices can be quickly copied from the general client/corporate expert/freelancer price list to an individual price list. To copy prices from the general price list to an individual price list:

1. Open the **Client, Corporate Expert or Freelancer** window.
2. Click the **Prices** tab, then click the **Copy from General** button.
3. Select a price in the **General Prices for Clients/Corporate Experts/Freelancers** area.
4. Click the **Copy Price** button to copy the selected price. To copy all prices, click the **Copy All Prices** button.

Global Interactive Resources: Prices

Main Contacts Marketing **Prices** Quotes Projects Client Jobs Invoices Credit Notes Payments Refunds

New Edit Delete **Copy from General**

Copy from General Prices for Clients

**Prices of Global Interactive Resources**

Drag a column header here to group by that column

* Group of Services	Service	Units	Price
Translation	English => French	words	0,075

1 of 1

**Copy Price** **Copy All Prices**

**General Prices for Clients**

Drag a column header here to group by that column

* Group of Services	Service	Units	Price
Translation	English => German	words	0,12
Translation	French => English	words	0,11
Translation	English => French	words	0,11
Translation	Localization, Eng-Dutch	words	0,20
Translation	German => English	words	0,12

1 of 24

Note: Only prices quoted in Client Currency are displayed.

OK

See also:

Managing price lists

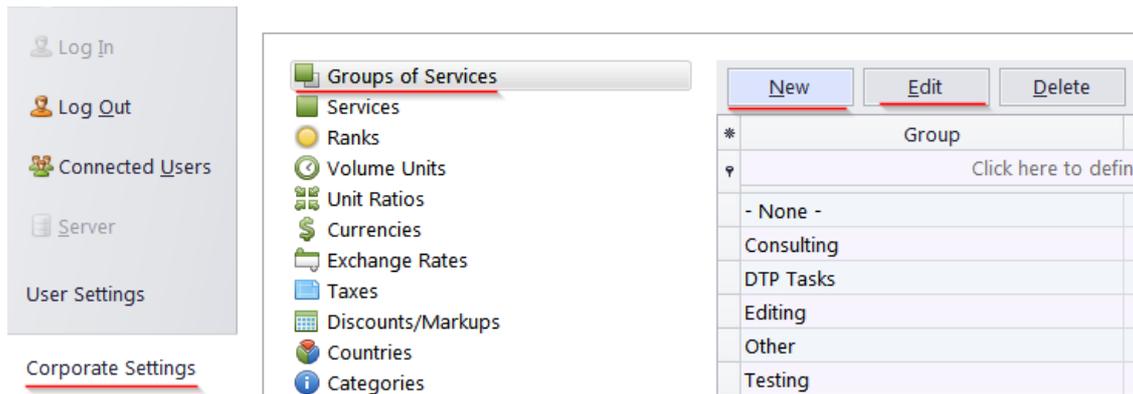
Creating/Editing Prices

# 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 a group of services.

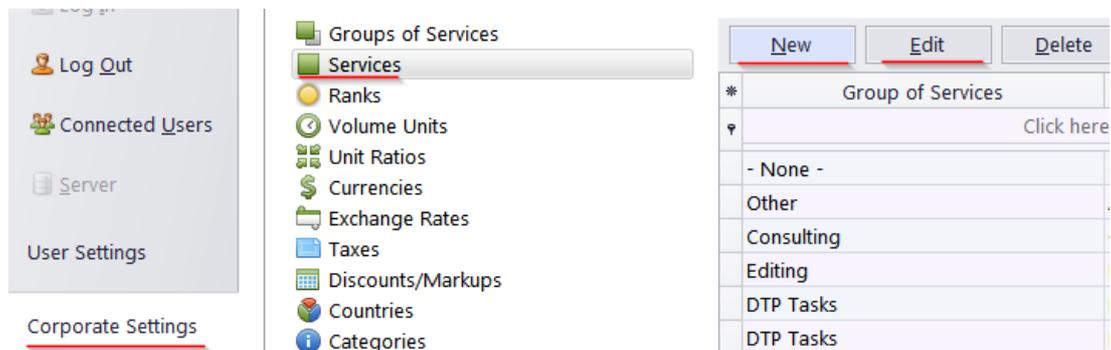
To add or edit a group of services:

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



To add or edit a service:

1. In the **Backstage** view, click **Corporate Settings**.
2. In the **Corporate Settings** window click **Services**.
3. Click the **New** button to add a new service, or click the **Edit** button to open the currently selected service for editing.
4. Add or change the service information in the **New Service (Edit Service)** window.



See also:

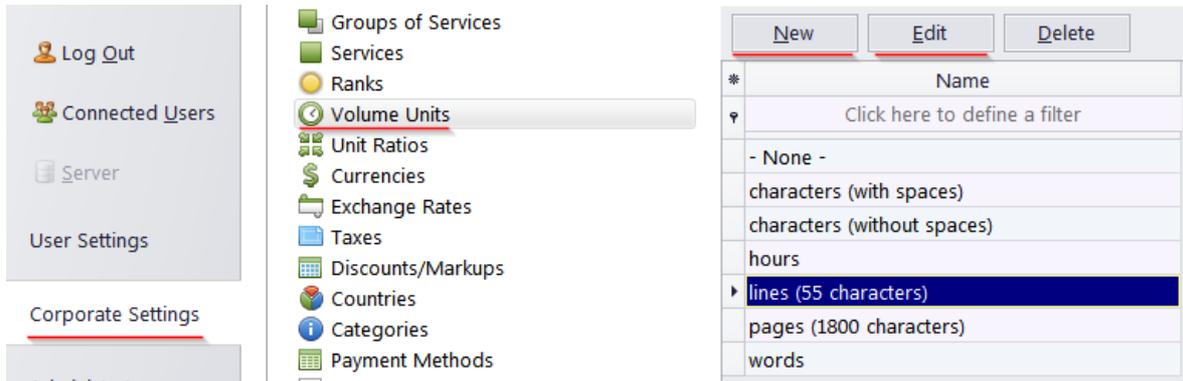
Creating/Editing Prices

# Managing Volume Units

Jobs in Projetex can be measured in various volume units (words, characters, hours, and so on). There is a number of default volume units, but new volume units can be added.

To add or edit a volume unit:

1. In the **Backstage** view, click **Corporate Settings**.
2. In the **Corporate Settings** window click **Volume Units**.
3. Click the **New** button to add a new volume unit, or click the **Edit** button to open currently selected unit for editing.
4. Add or change volume unit settings in the **New Volume Unit (Edit Volume Unit)** window.



See also:

[Creating/Editing Prices](#)

# Creating/Editing Client/Prospect Quotes

A quote to a client or prospect can be created or edited on the **Quotes** tab of the **Client/Prospect** window. To create/edit a quote, follow the steps below:

1. Open the **Main** tab of the **Client/Prospect** window and select the client or prospect.
2. Click the **Quotes** tab.
3. Click **New Quote** or select an existing quote and click **Edit**.

The screenshot shows the 'Definition Designs: Quotes' window. The 'Quotes' tab is active, and the 'New Quote' and 'Edit' buttons are highlighted with a red box. The window title is 'Edit Client Quote (Protected mode, 15:00 left)'. The client is 'Definition Designs', the project manager is 'Dong Min', and the corporate project manager is 'Bartholomeo Rodrigues'. The draft project is 'www.translation3000.com'. The quote is for 'www.translation3000.com' with a volume of 32 hours at a price of 34,00 per unit, totaling 1088,00. The status is 'Accepted'. The quote folder is 'D:\Business\Clients\DEFDES\Quotes\Q-DEFDES0002'. The draft timeline shows an assigned date of 06/10/2013 00:00 and a deadline of 21/10/2013 00:00. The quote total is 1088,00 USD. The client currency is USD, and the exchange rate is 1 USD = 0,77 EUR. The RTF template is 'MultiQuote to Client - Template - English.rtf'.

* Name	Group of Service	Service	Unit	Volume	Price	Pricing	Total
www.translation3000.com	Consulting	Multilingual C	hours	32	34,00	per unit	1088,00

Client/prospect quotes can contain the following data:

**Client/Prospect** — the company name of the client or prospect. Can not be edited manually.

**Client/prospect PM** — select one of the client's contacts as the project manager or contact for this draft project (on the client's side).

**Corporate PM** — select one of your staff members to be the project manager for this draft project (on your side).

**Date sent** — aside from reference purposes, this date will also be used by the Global Date filter.

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

**Note:** Although the quote code cannot be edited directly, the quote counter can be advanced forward by assigning a higher next code value in the client's profile.

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

**Draft Project** — the name of the quote. This will also become the name of the project based on this quote. A draft project name may contain up to 100 characters.

**Client Jobs** — lists the draft client jobs of this quote. Use the **Customize columns** option to configure which data should be displayed.

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

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

**Audit** — this tab tracks when and by whom the quote was created or modified.

**Discounts/Markups** — each quote can have up to two discounts/markups placed on it. Discounts and markups can be managed in the **Discounts/Markups** tab of the **Corporate Settings** menu.

**Taxes** — each quote can have up to two taxes placed on it. Discounts and markups can be managed in the **Taxes** tab of the **Corporate Settings** menu.

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

**Draft Timeline** — like a regular project, a quote has *assigned* and *deadline* dates.

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

---

See also:

Creating/Editing Draft Client/Prospect Jobs

Creating/Editing Freelancer/Applicant quotes

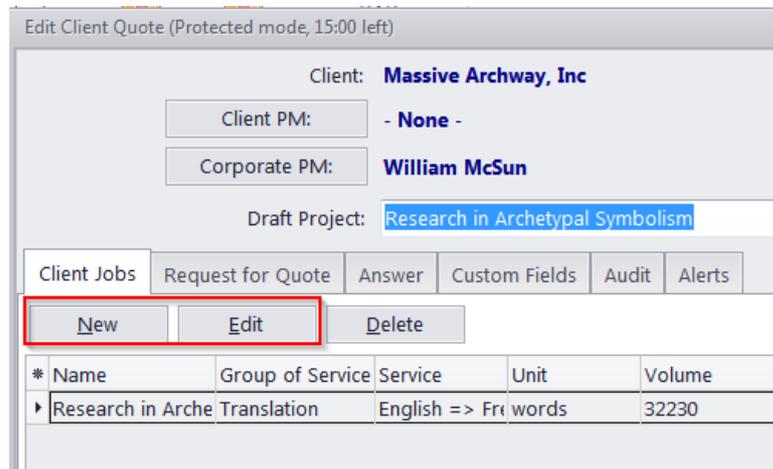
Saving, Printing and E-Mailing Quotes

# Creating Draft Client/Prospect Jobs

Draft client jobs can be created and edited either in the **New/Edit Quote** window while creating or editing a quote, or by selecting the quote and managing its draft client jobs in the table to the right.

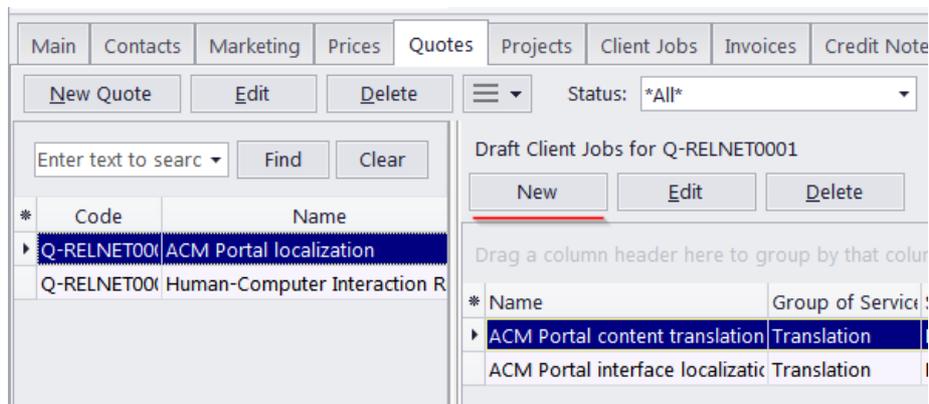
To add a draft client job from within the **New/Edit Quote** window:

1. Click **New Quote** or open a quote by double-clicking it in the list.
2. Click the **New** button on the **Client/Prospect Jobs** tab of the **Edit Quote** window.



Alternatively, draft client jobs can be added without the need to open a quote.

1. Select a quote in the list of quotes on the **Quotes** tab of the **Client** window.
2. With the quote selected, click the **New** button on the panel to the right.



See also:

[New/Edit Draft Client/Prospect Job Window](#)

# New/Edit Draft Client/Prospect Job Window

The New/Edit draft job Window includes the following elements:

**Name** — maximum 100 characters long.

**Group of services** — you can select any group of services available. To add or edit a new group of services, in the Backstage view click **Corporate Settings**, and select the **Groups of Services** section.

**Service** — each group of services contains a separate list of services. Before selecting a service, select group of services first. To add or edit a service, in the Backstage view click **Corporate Settings**, and select the **Services** section.

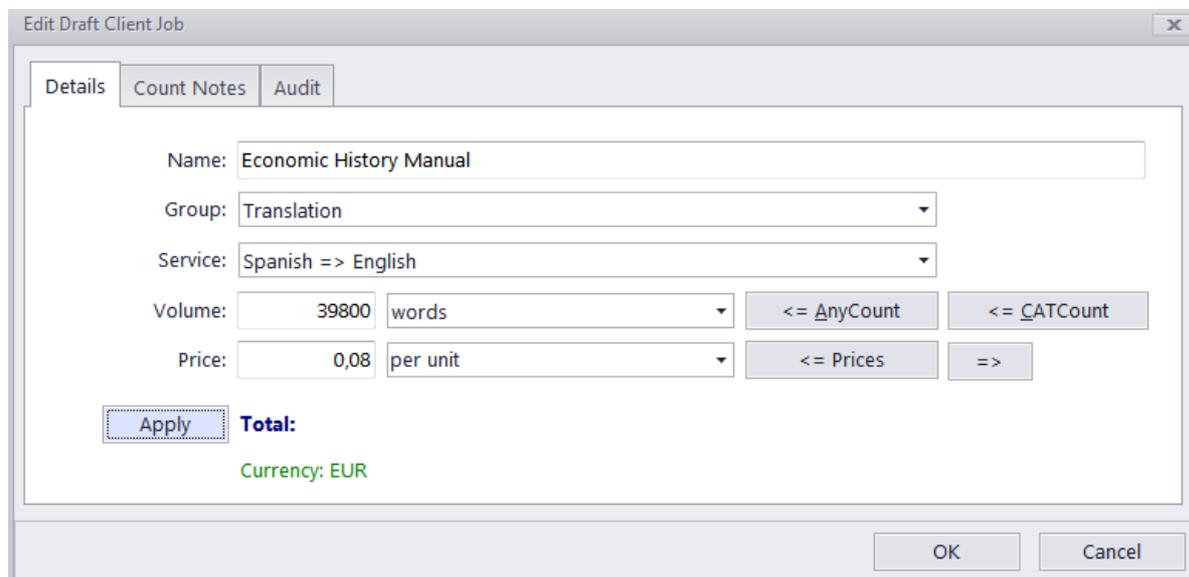
**Volume** — when entering the volume being quoted, you can either use the volumes specified by client, or count the client's file with the built-in AnyCount module. CAT analysis can also be used to determine the draft job volume. To count a file, click the **<=AnyCount** button. To enter a CAT analysis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

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

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

**Count Notes** — displays the results of AnyCount processing

**Audit** — tracks who and when created or modified the draft job.



The screenshot shows the 'Edit Draft Client Job' window with the following fields and buttons:

- Name:** Economic History Manual
- Group:** Translation
- Service:** Spanish => English
- Volume:** 39800 words
- Price:** 0,08 per unit
- Buttons:** <= AnyCount, <= CATCount, <= Prices, =>
- Apply** button
- Total:** Currency: EUR
- OK** and **Cancel** buttons at the bottom right.

See also:

Creating/Editing Draft Client/Prospect Jobs

# Creating/Editing Freelancer/Applicant quotes

A quote to a freelancer or applicant can be created or edited on the **Quotes** tab of the **Freelancer/Applicant** window. To create/edit a quote, follow the steps below:

1. Open the **Main** tab of the **Freelancer/Applicant** window and select the client or prospect.
2. Click the **Quotes** tab.
3. Click **New** or select an existing quote and click **Edit**.

Freelancer/applicant quotes can contain the following data:

**Freelancer/Applicant** — the name of the freelancer or applicant. Can not be edited manually.

**Date sent** — aside from reference purposes, this date will also be used by the Global Date filter.

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

**Note:** Although the quote code cannot be edited directly, the quote counter can be advanced forward by assigning a higher next code value in the client's profile.

**Status** — settings in this drop-down list determine the color in which the quote will be shown in the list on the **Quotes** tab of the **Freelancer/Applicant** window or on the **Clients/Prospects: Quotes** window.

**Possible Job** — the name of the quote.

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

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

**Audit** — this tab tracks when and by whom the quote was created or modified.

**Draft Timeline** — expert quotes have a *Start* and *Completion* date, but no *Deadline*.

If the expert's currency differs from your base currency, the **Currency Exchange Rate** button will be available. By clicking this

button, you may change the *currency exchange rate* used in this *quote*. Note that this button does not change the general exchange rate stored in your Projetex database. To change the exchange rate for all future quotes, go to the **Exchange Rates** tab of the **Corporate Settings** menu.

---

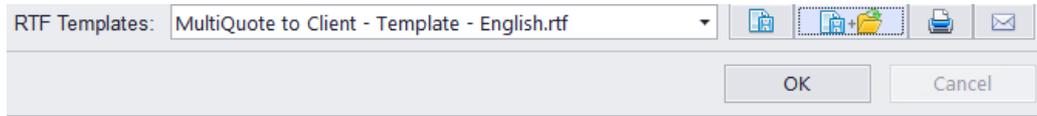
See also:

[Creating/Editing Client/Prospect Quotes](#)

[Saving, Printing and E-Mailing Quotes](#)

# Saving, Printing and E-Mailing Quotes

To print, save, or e-mail a **Client Quote** as an RTF document, use the RTF template controls near the bottom of the **New/Edit** window.



Use the **RTF Templates** drop-down list to select the template which must be used for printing, saving or e-mailing this client quote in an RTF file. Click the Save, Save & Open, Print, or Send Mail button to save, print or e-mail this client quote.

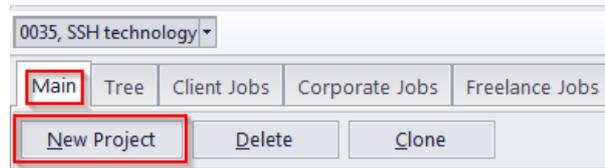
**Note:** You can choose to save the output file in *RTF*, *DOC* or *PDF* format by selecting this format in the **Save As** window via the **Save as type** drop-down list.

To edit templates for quotes, in **Backstage** view click **Corporate Settings** and select **Templates. Templates** for client quotes are located in the *D:\BusinessServer\Templates\CLIENTS\Quotes* folder.

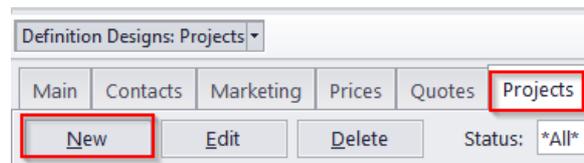
# Creating a project

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

**A:** On the **Main** tab of the **Project** window by clicking the **New Project** button. If you use this option you are prompted to select a client or create a new one first.



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



---

See also:

[New/Edit Project window](#)

[Creating client jobs](#)

[Creating Corporate Jobs](#)

[Creating Freelance Jobs](#)

# New/Edit Project window

The **New/Edit Project** window contains the following data:

**Code** — a unique project code is created automatically along with the project itself. It is a simple numerical counter.

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

**Product Line** — this button can be used to assign a project to a different product line of the client. The current product line's name and the list of responsible product line project managers are displayed next to the **Product Line** button. See the Client Product Lines 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 the default *client's PM* for all new client jobs of this project. See the Contacts List topic for details on adding and editing contacts.

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

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

**Information** — a plain text note for additional information.

**Project Folder** — the project's folder is created automatically when you click OK and create a new project. Once the folder has been created, its contents can quickly be accessed via the button on the right side of the **Project Folder** field.

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

You can use the buttons above the corresponding date fields to quickly set the assignment date to the current date, the deadline to the assignment date, or the completion date to the deadline or the current date.

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

**Special Status** — these are used when a project needs to be put *on hold*, *canceled* or when you create *heads-up* (or potential) projects. Projects with the *on hold* status have their deadlines undetermined, thus *on hold* projects cannot become overdue. Projects with the *heads-up* status cannot be set as completed, since the status assumes that work has not yet started. *Canceled projects* also can not be set as completed, since the status assumes that the project was abandoned.

 **Note:** All project data except project the code and client can be edited at any time later. See the Project Window Main Tab topic for details.

 **Note:** Job data, like volumes, pricing and so on is added to an existing project in the form of client jobs and expert jobs. See the Creating Client Jobs, Creating Corporate Jobs and Creating Freelance Jobs topics for details.

**Custom Fields** — project information can be customized by adding custom fields for additional information not foreseen by the default controls.

 **Note:** Only users with access to the Projetex Server Administrator can add or remove custom fields. See the Custom Fields topic for details.

**Audit** — keeps track of when and by whom the project was modified.

**Alerts** — keeps track of messages received from the Projetex 3D Automation Engine.

You can save project data in a printable file, print it, or e-mail it with the help of *RTF templates*.

Templates for printing project data can be edited via **Corporate Settings** in the **Backstage** view. Click the **Templates** section to quickly access all template folders. Templates for printing projects are saved in the *D:\BusinessServer\Templates\PROJECTS\* folder.

Client: **The Lightning Graphics** Code: 0034

Client PM: **Lane Ellis Annan** None

Product Line: **Main**

Details Custom Fields Audit Alerts

Project Name: **Norby workshop**

Corporate PM: **Fernando Lucena**

Information:

Project Folder: D:\Business\Projects\0034 Fernando Lucena Norby workshop

Timeline: =Now =Assigned =Deadline =Now

Assigned: 12/06/2016 00:00 (268 days ago)

Deadline: 28/06/2016 18:00 (252 days ago)

Completed:  28/06/2016 18:00 (252 days ago)

Special Status: None

RTF Templates: Project - Simple Template.rtf

OK Cancel

See also:

Creating a project

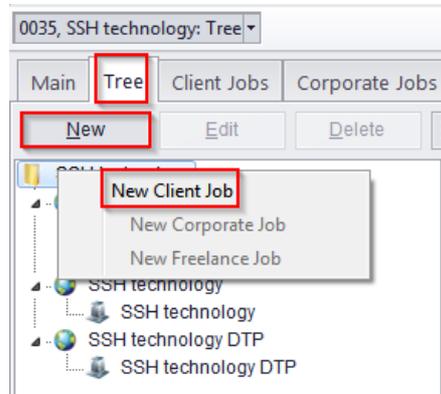
Saving Printing and E-Mailing Projects and Jobs

# Creating client jobs

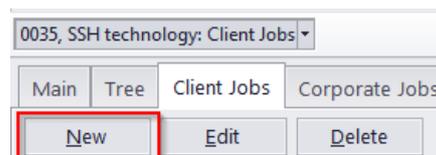
Client jobs can be created in the following areas of Projctex:

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

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



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



---

See also:

New/Edit Client Job window

# New/Edit Client Job window

The **New/Edit Client Job** window contains the following data:

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

**Client Ref.** — the client reference can be maximum 20 characters long.

**Client PO** — the number of the client's purchase order, can be maximum 40 characters long.

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

**Name** — the name of client job appears in invoices where this job is included (usually this is the name of the document being worked with). This name does not need to include the language pair or service name, since this data is being added separately. Also this will be the default name for any corporate job or freelance job added to this client job. The client job name can be 100 characters long maximum.

**Group** — the group of services. All services in Projetex are broken down into groups. You can select any of the groups of services available. To add or edit a group of services, open **Corporate Settings** in the **Backstage** view, and select the Groups of Services section.

**Service** — each group of services contains a separate list of services. Before selecting a service, select the group of services first. To add or edit a service, open **Corporate Settings** in the **Backstage** view, and select the Services section.

**Volume** — the job volume can be indicated in a number of units (characters, words, lines, hours and so on). To add custom units, open **Corporate Settings** in the **Backstage** view, and select the Volume Units section. All expert jobs of this client job will have their default volumes the same as this volume.

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

**Price** — the price can be entered manually or copied from the client's individual price-list.

To copy a price from price-list click the **<=Price** button. The price for matching service, group of services and unit combination will be copied.

Click the **=>** button to copy the price to this client's price list.

You can set a fixed price for the client job (which will not be multiplied by job volume) by selecting the **flat fee** option in the drop-down list next to the price field. Select the **free** option in the same drop-down list to set the job total to zero. The price and volume in a free job must not necessarily be zero.

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

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

**Create Invoice** — allows for quick invoicing of a job. You will be prompted to add this job either to a newly created or an existing invoice.

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

You can use the buttons above the corresponding date fields to quickly set the assignment date to the current date, the deadline to the assignment date, or the completion date to the deadline or the current date.

To mark a job as completed, click the **Timeline** button and select the **Completed** check box.

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

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

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

**Custom Fields** — client job information can be customized by adding custom fields for additional information not foreseen by the default controls.

 **Note:** Only users with access to the Projetex Server Administrator can add or remove custom fields. See the [Custom Fields](#) topic for details.

**Audit** — keeps track of when and by whom the job was modified.

**Alerts** — keeps track of messages received from the Projetex 3D Automation Engine.

You can save client job data in a printable file, print it, or e-mail it with the help of *RTF templates*.

Templates for printing project data can be edited via the **Corporate Settings** in the **Backstage** view. Click the **Templates** section to quickly access all template folders. Templates for printing client jobs are saved in the *D:\BusinessServer\Templates\CLIENTS\Jobs* folder.

Client: **The Illustrative Designs** Code: J-ILLDES0005  
Project: **0059, Creative Engineering** Client Ref.:  
Client Account: **Main** Client PO:  
Client PM: **Jens Jacobson**

Details | Instructions | Work Notes | Custom Fields | Project Folder | Audit | Alerts

Name: **Creative Engineering - additional materials**  
Group: Translation  
Service: English => Dutch  
Volume: 5900 words <= AnyCount <= CATCount  
Price: 0,12 per unit <= Prices => Client Currency: EUR  
**Total: 708,00**

Project Folder: D:\Business\Projects\0059 William McSun Creative Engineering\ Create Invoice

Timeline: =Now =Assigned =Deadline =Now  
Assigned: 05/02/2017 09:00 (30 days ago) ▶ Deadline: 03/05/2017 18:00 (in 57 days) ▶ Completed:  
Special Status: Heads-Up

RTF Templates: Client Job - Template - English.rtf

OK Cancel

See also:

[AnyCount in Projetex](#)

[CATCount in Projetex](#)

[Client Job Template Variables](#)

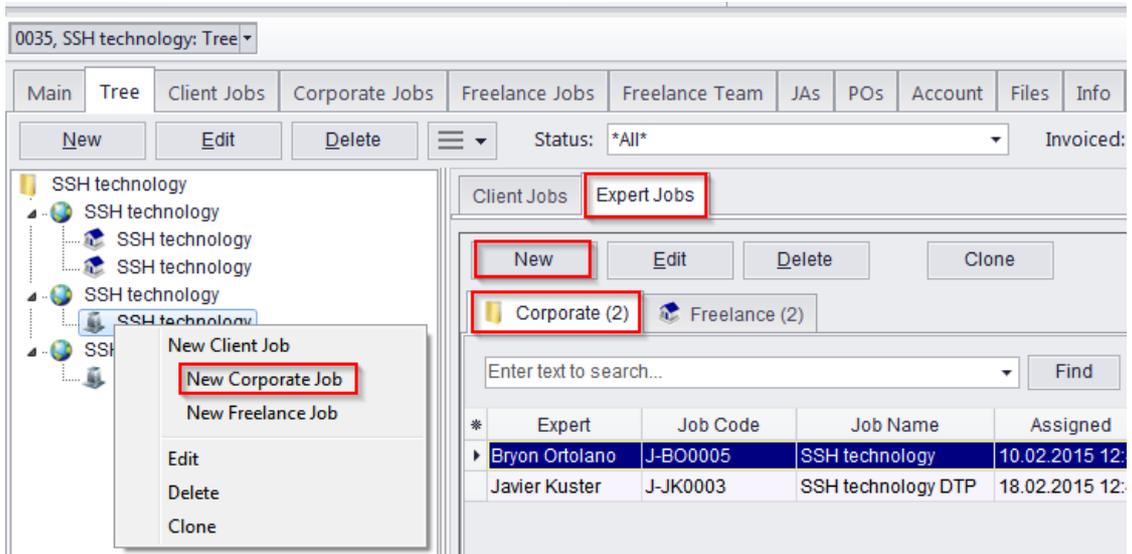
[Saving Printing and E-Mailing Projects and Jobs](#)

# Creating corporate jobs

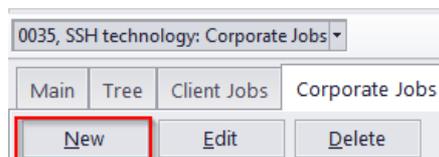
*Corporate jobs* can be created in the following areas of Projctex:

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

- by right-clicking a client job in the tree view and selecting **New Corporate Job**
- by clicking the **Expert Jobs** tab, then clicking the **Corporate Jobs** tab and then clicking the **New** button.



**B:** The **Corporate Jobs** tab of the **Project** window by clicking **New** button.



See also:

New/Edit Corporate Job window

# New/Edit Corporate Job window

The **New/Edit Corporate Job** window contains the following data:

**Code** — the unique job code is created automatically along with the job itself. The first character "J" indicates that this is a job code, the letters afterwards can be either *VACANT* (meaning that no expert has been assigned to the job) or show the assigned expert's code. The number is the value of the corporate job counter for the assigned expert. Each expert has an independent counter for this code. If corporate jobs are reassigned to a different expert, their codes (both the letters and the counter) change accordingly.

**Corporate Expert** — experts can be assigned and reassigned at will as long as this corporate job is not included in a job assignment. Corporate jobs must be removed from a job assignment before expert reassignment.

**Name** — this name does not need to include the language pair or service name, since that data is added separately. By default this is the name of the parent client job. A corporate job name can be 100 characters long maximum.

**Group** — the group of services. All services in Projetex are broken into groups. You can select any of the groups of services available. To add or edit a group of services, open **Corporate Settings** in the **Backstage** view, and select the Groups of Services section.

**Service** — each group of services contains a separate list of services. Before selecting a service, select the group of services first. To add or edit a service, open **Corporate Settings** in the **Backstage** view, and select the Services section.

**Volume** — the job volume can be indicated in a number of units (characters, words, lines, hours and so on). To add custom units, open **Corporate Settings** in the **Backstage** view, and select the Volume Units section.

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

**Price** — the price can be entered manually or copied from the client's individual price-list.

To copy a price from the price-list click the **<=Price** button. The price for matching service, group of services and unit combination will be copied.

Click the **=>** button to copy the price to this client's price list.

You can set a fixed price for the corporate job (which will not be multiplied by the job volume) by selecting the **flat fee** option in the drop-down list next to the price field. Select the **free** option in the same drop-down list to set the job total to zero. The price and volume in a free job must not necessarily be zero.

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

**Time spent** — unlike with client and freelancer jobs, the cost of corporate jobs can also be determined by multiplying the time spent on the job by the average hourly cost (AHC) of the corporate expert who completed it. Results are displayed in the **Total Cost** string. Projetex will also calculate the *productivity* (Volume units per hour) of the corporate job by taking into account the volume, time spent and AHC.

**JA Folder** — job assignment folders contain all files an expert would need to begin working on the job. When creating or editing corporate jobs it is often necessary to work with job files (for example you may need to copy a name of the file or count a job file for its exact volume).

Before creating a JA folder, create the job assignment itself by clicking the **Create JA** button. This will create a job assignment containing this corporate job, or add this job to an existing JA, if there are any. See [Creating job assignments](#) for more details on JAs.

Once a job assignment has been created, the **JA Folder** tab becomes available. This tab can be used to access the JA folder without opening any additional windows. Also, the **JA Folder** tab can be used to quickly find and access a number of folders related to this job, like the project folder, client folder and FTP folders of the client.

**Timeline** — the timeline of a corporate job in Projetex includes the assigned and deadline dates, as well as the date when the corporate job has been actually completed. The **Deadline** and **Completed** values are taken into account when Projetex determines the status of corporate jobs (like due today, overdue and so on).

You can use the buttons above the corresponding date fields to quickly set the assignment date to the current date, the deadline to the assignment date, or the completion date to the deadline or the current date.

To mark a job as completed, click the **Timeline** button and select the **Completed** check box.

**Job Quality** — the job quality parameter allows you to evaluate the quality of a job performed by a corporate expert. The rating ranges between 1 and 100. Unrated jobs have a rating of 0.

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

**Instructions** — any Project Manager instructions or comments regarding a corporate job can be entered here in the form of a plain text note.

**Work Notes** — corporate expert notes can be entered here. It is recommended to enter PM notes and expert notes separately.

**Custom Fields** — corporate job information can be customized by adding custom fields for additional information not foreseen by the default controls.

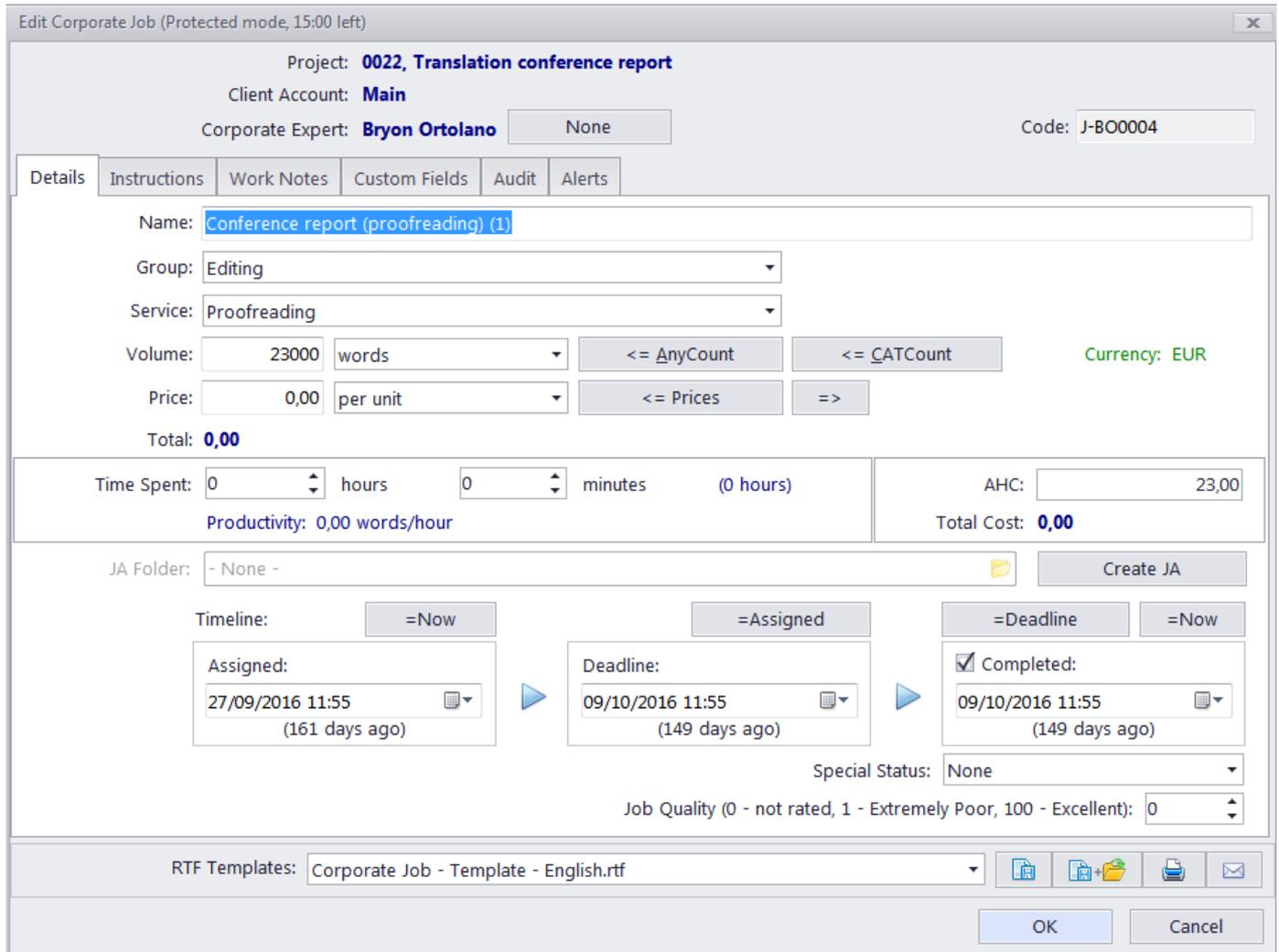
 **Note:** Only users with access to the Projotex Server Administrator can add or remove custom fields. See the Custom Fields topic for details.

**Audit** — keeps track of when and by whom the job was modified.

**Alerts** — keeps track of messages received from the Projotex 3D Automation Engine.

You can save corporate job data in a printable file, print it, or e-mail it with the help of *RTF templates*.

Templates for printing corporate job data can be edited via the **Corporate Settings** in the **Backstage** view. Click the **Templates** section to quickly access all template folders. Templates for printing corporate jobs are saved in the *D:\BusinessServer\Templates\EXPERTS\CORPORATE\Jobs* folder.



Project: **0022, Translation conference report**  
Client Account: **Main**  
Corporate Expert: **Bryon Ortolano**  Code: J-BO0004

Details | Instructions | Work Notes | Custom Fields | Audit | Alerts

Name:   
Group:   
Service:   
Volume:  words   Currency: EUR  
Price:  per unit    
Total: **0,00**

Time Spent:  hours  minutes (0 hours) AHC:   
Productivity: 0,00 words/hour Total Cost: **0,00**

JA Folder:

Timeline:

Assigned:  (161 days ago)  Deadline:  (149 days ago)  Completed:   (149 days ago)

Special Status:   
Job Quality (0 - not rated, 1 - Extremely Poor, 100 - Excellent):

RTF Templates:

See also:

[AnyCount in Projotex](#)

[CATCount in Projotex](#)

[Corporate Job Template Variables](#)

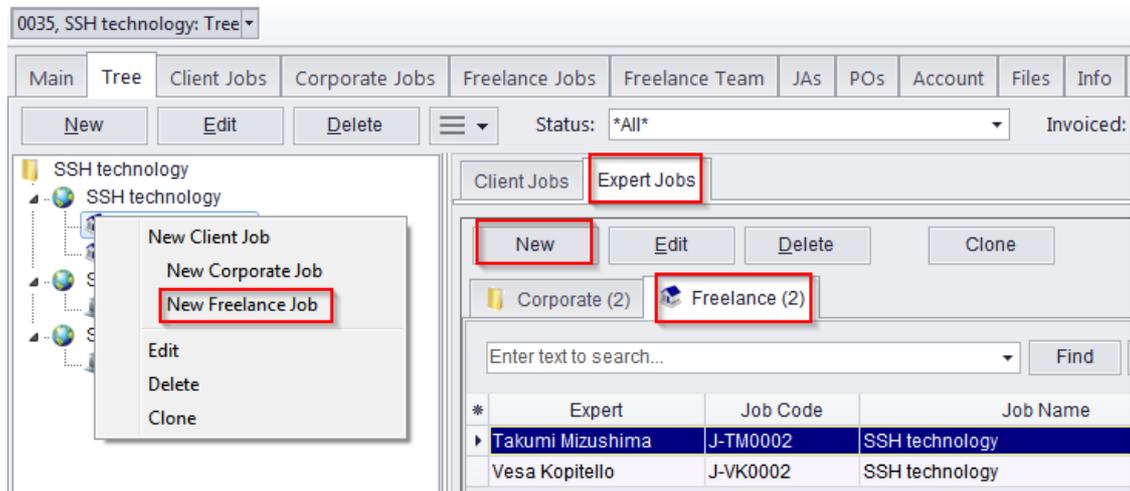
[Saving Printing and E-Mailing Projects and Jobs](#)

# Creating freelance jobs

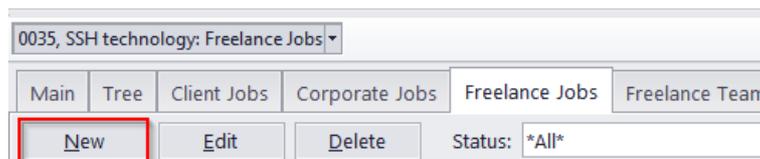
Freelance jobs can be created in the following areas of Projetex:

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

- by right-clicking a client job in the tree view and selecting **New Freelance Job**
- by clicking the **Expert Jobs** tab, then clicking the **Freelance Jobs** tab and then clicking the **New** button.



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



See also:

New/Edit Freelance Job window

# New/Edit Freelance Job window

The **New/Edit Freelance Job** window contains the following data:

**Code** — the unique job code is created automatically along with the job itself. The first character "J" indicates that this is a job code, the letters afterwards can be either *VACANT* (meaning that no expert has been assigned to the job) or represent the assigned freelancer code. The number is the value of the job counter for the assigned freelancer. Each freelancer has an independent counter for this code. If freelance jobs are reassigned to a different freelancer, their codes (both the letters and the counter) change accordingly.

**Freelancer** — freelance experts can be assigned and reassigned at will as long as this freelance job is not included in a purchase order. Freelance jobs must be removed from purchase orders before freelancer reassignment.

**Name** — this name does not need to include the language pair or service name, since that data is being added separately. By default, this is the name of the parent client job. A freelance job's name can be 100 characters long maximum.

**Group** — the group of services. All services in Projetex are broken into groups. You can select any of the groups of services available. To add or edit a group of services, open **Corporate Settings** in the **Backstage** view, and select the Groups of Services section.

**Service** — each group of services contains a separate list of services. Before selecting a service, select the group of services first. To add or edit a service, open **Corporate Settings** in the **Backstage** view, and select the Services section.

**Volume** — the job volume can be indicated in a number of units (characters, words, lines, hours and so on). To add custom units, open **Corporate Settings** in the **Backstage** view, and select the Volume Units section.

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

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

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

**PO Folder** — purchase order folders contain all files the freelancer would need to begin working on the job. When creating or editing freelance jobs it is often necessary to work with job files (for example, you may need to copy the name of the file or count a job file for its exact volume).

Before creating a PO folder, create a purchase order itself by clicking the **Create PO** button. This will create a purchase order containing this freelance job, or add this job to an existing PO, if there are any. See [Creating Purchase Orders](#) for more details on POs.

Once a purchase order has been created, the **PO Folder** tab becomes available. This tab can be used to access the PO folder without opening any additional windows. Also, the **PO Folder** tab can be used to quickly find and access a number of folders related to this job, like the project folder, the client's FTP folder and the JA folders of other JAs in this project.

**Timeline** — the timeline of a freelance job in Projetex includes the assigned and deadline dates, as well as the date when the freelance job has been actually completed. The Deadline and Completed values are taken into account when the program determines the status of freelance jobs (like due today, overdue and so on).

You can use the buttons above the corresponding date fields to quickly set the assignment date to the current date, the deadline to the assignment date, or the completion date to the deadline or the current date.

To mark a job as completed, click the **Timeline** button and select the **Completed** check box.

**Job Quality** — the job quality rating allows you to evaluate the quality of freelance jobs. It may contain any ratings from 1 to 100. *Job Quality* can be displayed when you search for freelancers using the **Search** function. The **Search** button is located on the **Main** tab of the **Freelancer window** and on the **Freelance Team Tab** of the **Project Window**.

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

**Instructions** — any instructions (like terminology to use) regarding a freelance job can be entered here in the form of a plain text note.

**Work Notes** — staff notes can be entered here.

**Custom Fields** — freelance job information can be customized by adding custom fields for additional information not foreseen by the default controls.

**Note:** Only users with access to the Projetex Server Administrator can add or remove custom fields. See the Custom Fields topic for details.

**Audit** — keeps track of when and by whom the job was modified.

**Alerts** — keeps track of messages received from the Projetex 3D Automation Engine.

You can save freelance job data in a printable file, print it, or E-mail it with the help of *RTF templates*.

Templates for printing freelance jobs can be edited via the **Corporate Settings** in the **Backstage** view. Click the **Templates** section to quickly access all template folders. Templates for printing freelance jobs are saved in the `...\Business\Templates\EXPERTS\FREELANCE\Jobs` folder.

Project: **0019, Marketing booklet**  
Client Account: **Main**  
Freelancer: **Emma Woodward**  Code:

Details | Instructions | Work Notes | Custom Fields | PO Folder | Audit | Alerts

Name:   
Group:   
Service:   
Volume:      
Price:      
**Total: 0,00** Currency: **GBP**  
1 GBP = 1,00 EUR

PO Folder:

Timeline:

Assigned:  (385 days ago)

Deadline:  (382 days ago)

Completed:  (382 days ago)

Special Status:   
Job Quality (0 - not rated, 1 - Extremely Poor, 100 - Excellent):

RTF Templates:

See also:

[AnyCount in Projetex](#)

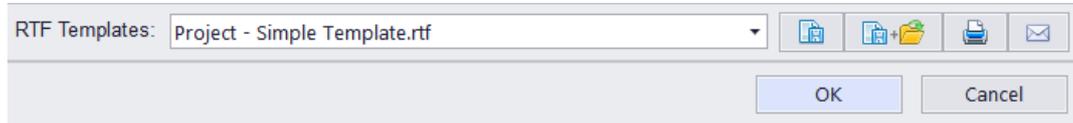
[CATCount in Projetex](#)

[Freelance Job Template Variables](#)

[Saving Printing and E-Mailing Projects and Jobs](#)

# Saving Printing and E-Mailing Projects and Jobs

To print, save or e-mail a **Project/Job** as an RTF document, use the RTF template controls near the bottom of the corresponding **New/Edit** window.



Use the **RTF Templates** drop-down list to select the template which must be used for printing, saving or e-mailing the project/job as an RTF file. Click the **Save**, **Save & Open**, **Print**, or **Send Mail** button to save, print, or e-mail the **Project/Job**.

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

To edit templates for projects, in the **Backstage** view click **Corporate Settings** and select **Templates**. **Templates for Projects** are located in the *D:\BusinessServer\Templates\Projects\* folder. **Templates** for jobs are located in the folders *D:\BusinessServer\Templates\CLIENTS\Jobs*, *D:\BusinessServer\Templates\EXPERTS\CORPORATE\Jobs*, and *D:\BusinessServer\Templates\EXPERTS\FREELANCE\Jobs*.

---

See also:

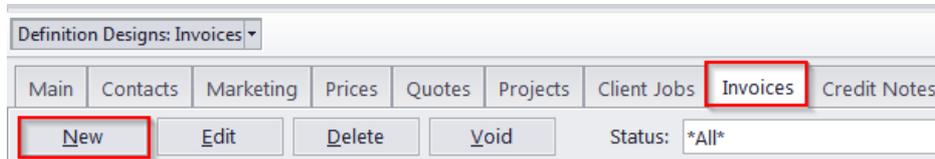
Template Basics

# Creating Invoices

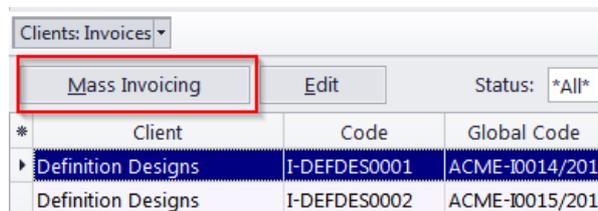
Invoices can be created on the **Invoices** tab of the **Client** window.

To create an invoice to a client,

1. Open the **Main** tab of the **Client** window and select a client.
2. Switch to the **Invoices** tab and click the **New** button.

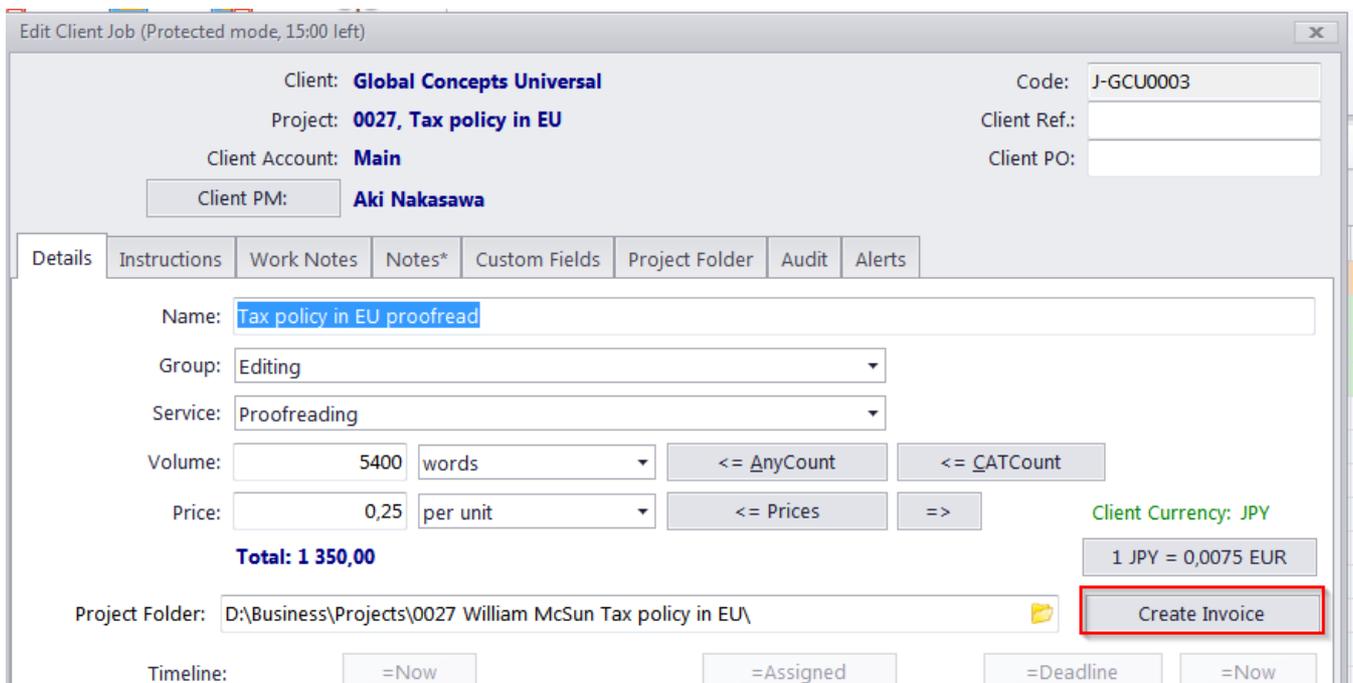


Invoices can also be created via the **Mass Invoicing** function of the **Clients: Invoices** window.



Invoices can also be created directly from the **Edit Client Job** window. To create an invoice this way:

1. Open any client job, which has not yet been added to an invoice. Client jobs can be found on the **Client Jobs** tab of the **Project** window.
2. In the **Edit Client Job** window click the **Create Invoice** button.
3. A client job can be added to existing Invoice, or to a new one. Click the **Add this Job to New Invoice** string to create a new invoice.



See also:

New/Edit Invoice Window

Mass invoicing

# New/Edit Invoice Window

The **New/Edit Invoice** window contains the following data:

**Approved** — once an invoice has been approved by the project manager, its jobs become locked and cannot be edited unless this checkbox is cleared.

**Date Sent** — this date is considered the invoice issue date (no matter when the invoice has actually been created). A client's payment terms client may refer to this date when determining the *paid* status of the invoice.

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

**Global Code** — the global code is generated automatically. The global invoice code layout can be configured in the **Codes** section the **Administrator** settings. The non-configurable portion of the code (digits) represents the global invoice counter.

**Attention** — select one of the client's contact persons in this field. The name of the selected contact person will be displayed in the resulting invoice document.

**Client Jobs** — lists the client jobs ("items") of this invoice. Only uninvoiced Jobs without a Special Status can be added to an invoice. Use the **Customize columns option** to configure which data should be displayed.

**Discount/Markup** — invoices can have up to 2 discounts and markups. These are applied as positive (markup) or negative (discount) percentages to the invoice subtotal. To configure discounts and markups, in the Backstage view click **Corporate Settings** and select the **Discounts/Markups** section.

**Tax** — each invoice can have up to 2 taxes. Taxes are applied as percentages to invoice subtotals plus discounts/markups. To configure taxes, in the Backstage view click **Corporate Settings** and select the **Taxes** section.

 **Note:** After a discount/markup or tax has been selected for an invoice of a client, this discount/markup or tax will be remembered and applied as the default for the client. All subsequent invoices will include this discount/markup or tax. The default discount/markup or tax can be changed in any time, by choosing another value during invoice creation.

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

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

**Payment Method** — you can add payment details (banking, credit card number, PayPal account and so on) to your invoice via the **Payment Method** tab. To configure available payment methods, in the **Backstage** view click **Corporate Settings** and select the **Payment Methods** section.

 **Note:** After a payment method has been selected for an invoice of a client, this payment method will be remembered and applied as the default for the client. All next invoices will include this payment method. The default payment method can be changed in any time, by choosing another value during invoice creation.

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

Also, phantom payments can be created on the **Linked with Payments** tab. Phantom payments are not added to the actual balance, yet they can make an "outstanding" invoice "settled".

## Example:

The invoice total is 1000EUR, and the invoice is linked with a payment of 997EUR (suppose your client did not account for banking fees). When you click **Add Phantom Payment** you will be prompted to create a phantom payment of 3EUR. After the payment has been created, the invoice will be automatically labeled as "settled".

**Linked Credit Note** — displays the credit notes linked to this invoice.

**Notes** — any additional notes which your invoice must include, can be added on this tab. These notes can be automatically added to the printed invoice.

**Custom Fields** - custom information can be entered or selected in proper custom fields on this tab. Custom database fields can be added in the Projotex Server Administrator.

**Audit** — keeps track of when and by whom the invoice was modified.

**Alerts** — keeps track of messages received from the Projotex 3D Automation Engine.

Edit Client Invoice (Protected mode, 15:00 left)

From: **Vitaliy Gutyk** Date Sent: 12/02/2017

To: **Network Community Technologies** Code: I-NETCOM0003

Approved (Jobs Locked) Global Code: ACME-I0071/2017

Attention: Melisa Lederer

Client Jobs Adjustments Payment Method Linked with Payments Linked Credit Note Notes Custom Fields Audit Alerts

* Completed	Job Code	Job Name	Client PM	Group of Services	Service
25.12.2016 18:00:00	J-NETCOM0	Analog deviation part 3	Melisa Lederer	Translation	English = Spanish
14.01.2015 18:00:00	J-NETCOM0	FAQ file Proofreading	Melisa Lederer	Editing	DTP check

2 of 2

Discount/Markup: - None - (0,00%) 0,00 Client Currency: EUR

Discount/Markup 2: - None - (0,00%) 0,00 Invoice Total: 2050,00

Net Jobs Total: 2050,00 Paid: 0,00

Tax: - None - (0,00%) 0,00 Balance Due: 2050,00

Tax 2: - None - (0,00%) 0,00

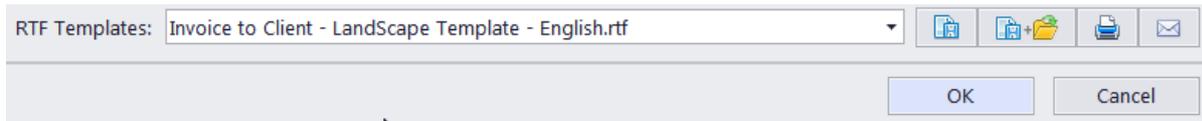
RTF Templates: Invoice to Client - LandScape Template - English.rtf

See also:

Saving, Printing and E-Mailing Invoices

# Saving, Printing and E-Mailing Invoices

To print, save or e-mail an **Invoice** as an RTF document, use the RTF template controls near the bottom of the **New/Edit** window.



Use the **RTF Templates** drop-down list to select the template which must be used for printing, saving or e-mailing this invoice as an RTF file. Click the **Save**, **Save & Open**, **Print**, or **Send Mail** button to save, print, or e-mail the **Invoice**.

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

To edit templates for invoices, in the **Backstage** view click the **Corporate Settings** command and select **Templates**. Templates for invoices are located in the *C:\BusinessServer\CLIENTS\Invoices\* folder.

---

See also:

[Creating Invoices](#)

[Template Basics](#)

# Void Invoices

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

To void invoice, open the **Invoices Tab** of the **Client Window**, select an invoice and click the **Void** button.

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

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

- Client Jobs: Code, Client Ref., PO Number, Name, Assigned, Deadline, Completed, Price, Volume, Exchange Rate: Total
- Discounts: name, percentage, and volume
- Taxes: name, percentage, and volume

An invoice cannot be voided if it has linked payments. Void invoices are displayed in all invoice lists.

**View Voided Invoice**

Sent: **04.12.2016**

From: **Vitaliy Gutyk**

To: **Enigma Server Technologies, Inc**

Date Marked Void: 07/03/2017

Code: I-ENISERV0003

Global Code: ACME-I0067/2016

Reason:

Details:

--- Client Jobs ---  
Code: J-ENISERV0005  
Client Ref.:  
PO Number:  
Name: Serv-client tech. - DTP  
Assigned: 14.09.2016  
Deadline: 01.12.2016 18:00:00  
Status: 03.12.2016 18:00:00  
Completed: 03.12.2016 18:00:00  
Price: 5,00  
Volume: 230  
Pricing: per unit

OK Cancel

See also:

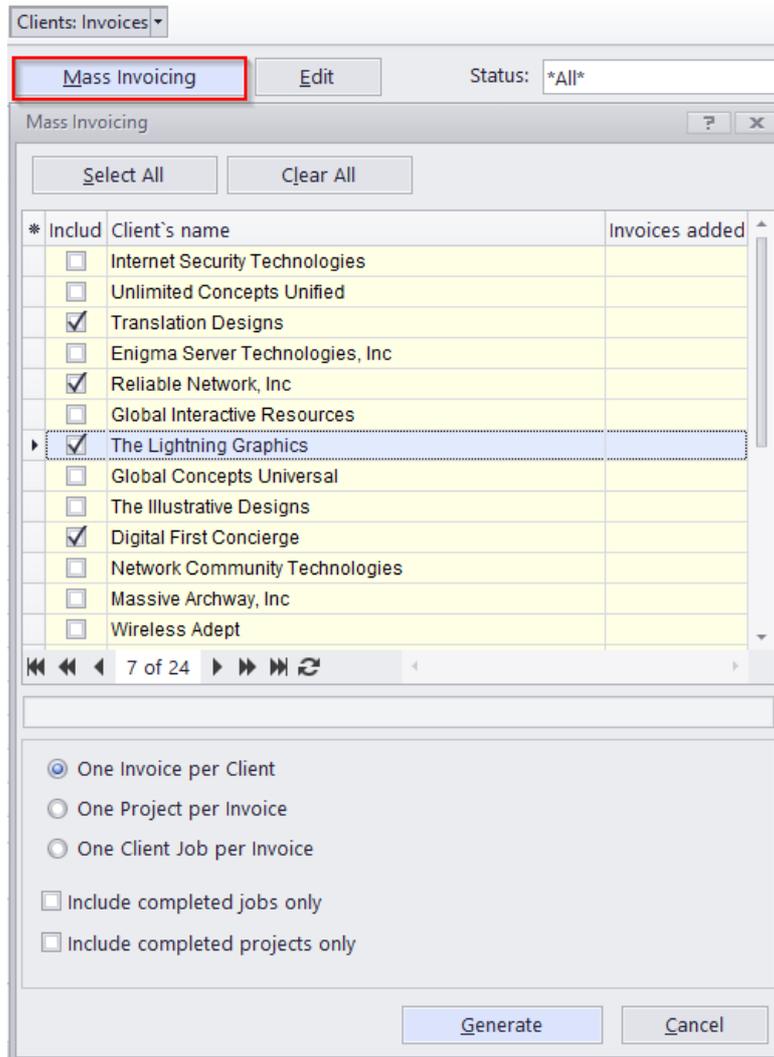
[Creating Invoices](#)

[Mass invoicing](#)

# Mass invoicing

Mass invoicing can be done from the **Invoices to Clients** window. It allows to quickly invoice all or certain client jobs stored in the database.

1. To begin the invoicing procedure, open the **Clients: Invoices** window and click **Mass Invoicing** (shortcut Alt+M).
2. This will open the **Mass Invoicing** window.



Select the clients whose jobs you wish to invoice by double-clicking the check box next to the client.

Select one of the invoicing methods:

- **one Invoice per Client** (all uninvoiced client jobs of each client will be included into one invoice);
- **one Project per Invoice** (all uninvoiced client jobs of each project will be included into one invoice);
- **one Client Job per Invoice**.

3. You may check **Include completed jobs only** to limit invoicing to completed jobs or **Include completed projects only** to limit invoicing to jobs from completed projects.

4. After selecting the required clients and setting up **Mass Invoicing** options, click the **Generate** button. The program will start creating invoices, which will be indicated by a progress bar.

5. Once all specified invoices have been generated, the **Mass Invoicing** window will display the number of invoices generated opposite each client.

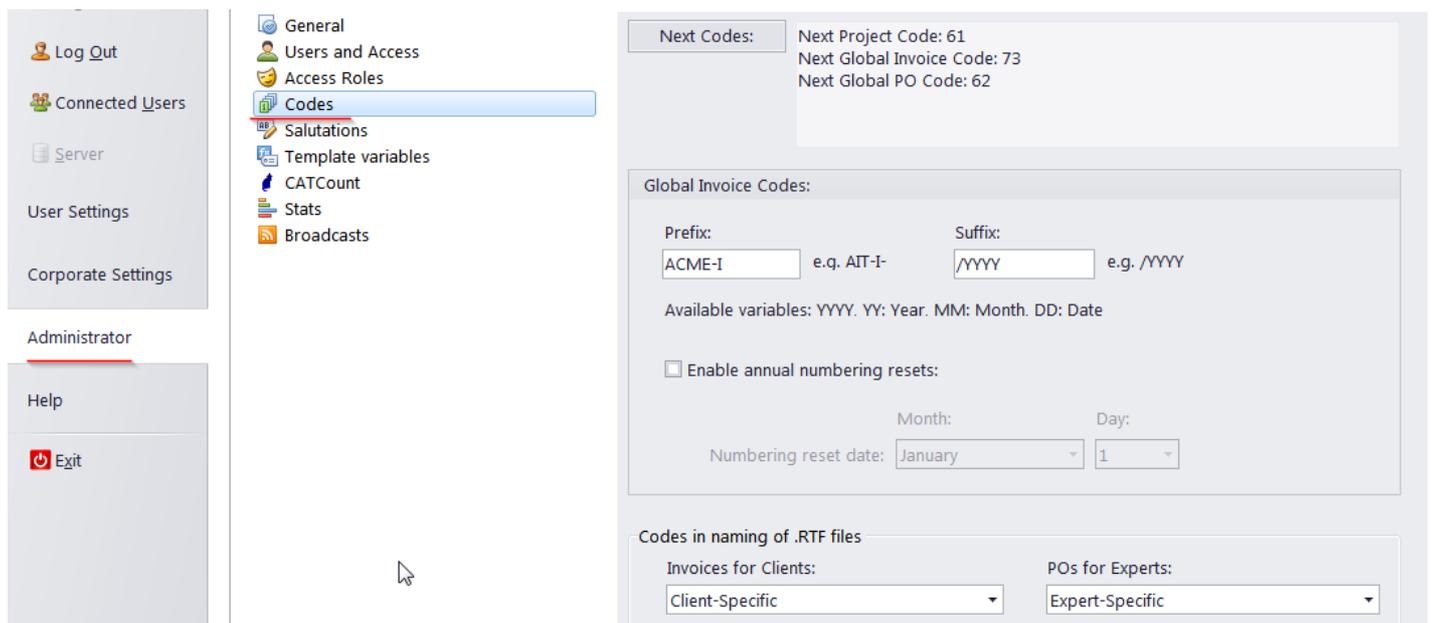
**Note:** Once the invoices have been generated, they can be opened and edited in the **Invoices to Clients** window or on the **Invoices tab** of the **Client** window.

See also:

Creating Invoices

# Managing Global Codes

Global codes of invoices and purchase orders can be managed in the **Codes** area on the **Administrator** tab of the Backstage view.



The screenshot displays the 'Codes' configuration interface. On the left, a navigation pane includes 'Log Out', 'Connected Users', 'Server', 'User Settings', 'Corporate Settings', 'Administrator', 'Help', and 'Exit'. The main content area is titled 'Codes' and is divided into three sections:

- Next Codes:** Shows the next codes to be assigned: Next Project Code: 61, Next Global Invoice Code: 73, and Next Global PO Code: 62.
- Global Invoice Codes:** Allows customization of the prefix and suffix. The prefix is 'ACME-I' (example: AIT-I) and the suffix is '/YYYY' (example: /YYYY). Available variables are listed as YYYY, YY: Year, MM: Month, and DD: Date. There is an unchecked checkbox for 'Enable annual numbering resets' and a 'Numbering reset date' field set to 'January 1'.
- Codes in naming of .RTF files:** Contains two dropdown menus: 'Invoices for Clients' (set to 'Client-Specific') and 'POs for Experts' (set to 'Expert-Specific').

## Setting Next Codes

Click the **Next Codes** button to set the global code which will be assigned to the:

- next *Project*;
- next *Invoice* issued to a client;
- next *PO* issued to a freelancer.

**Note:** The next code cannot be less than last code of this type in the database. Thus if you already have a project with code 10, the next project code cannot be set to 10 or less (even if some projects with codes 1-9 have been deleted).

## Editing Global Invoice Code display format

Also, you can customize the prefix and suffix of global invoice and purchase order codes, and enable annual numbering resets. Regulations in some countries may require you to reset invoice counters each year.

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

## Codes in naming RTF files

**Codes in naming of .RTF files** options determine what code will be used when automatically generating file names for POs and invoices (it can be Client/Expert-Specific or Global).

See also:

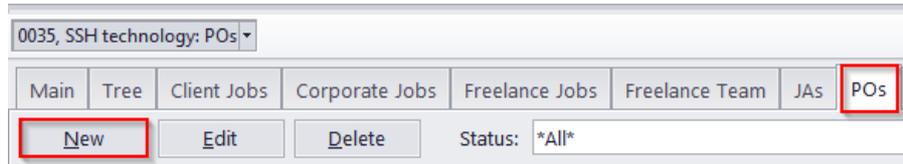
Codes

# Creating Purchase Orders

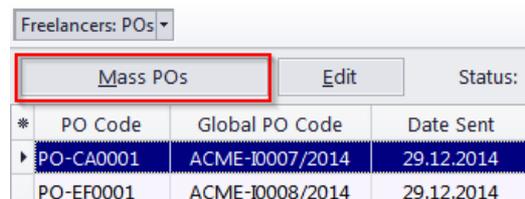
Purchase orders (or *POs*) in Projetex are formal orders to a freelance expert requesting them to perform a certain freelance jobs for a certain fee.

To create a purchase order:

1. Open the **Main** tab of the **Project** window and click the required project.
2. Click the **POs** tab.
3. Click the **New** button. You will be prompted to choose a freelancer among those assigned to the project's jobs before being taken to the **New PO** window.

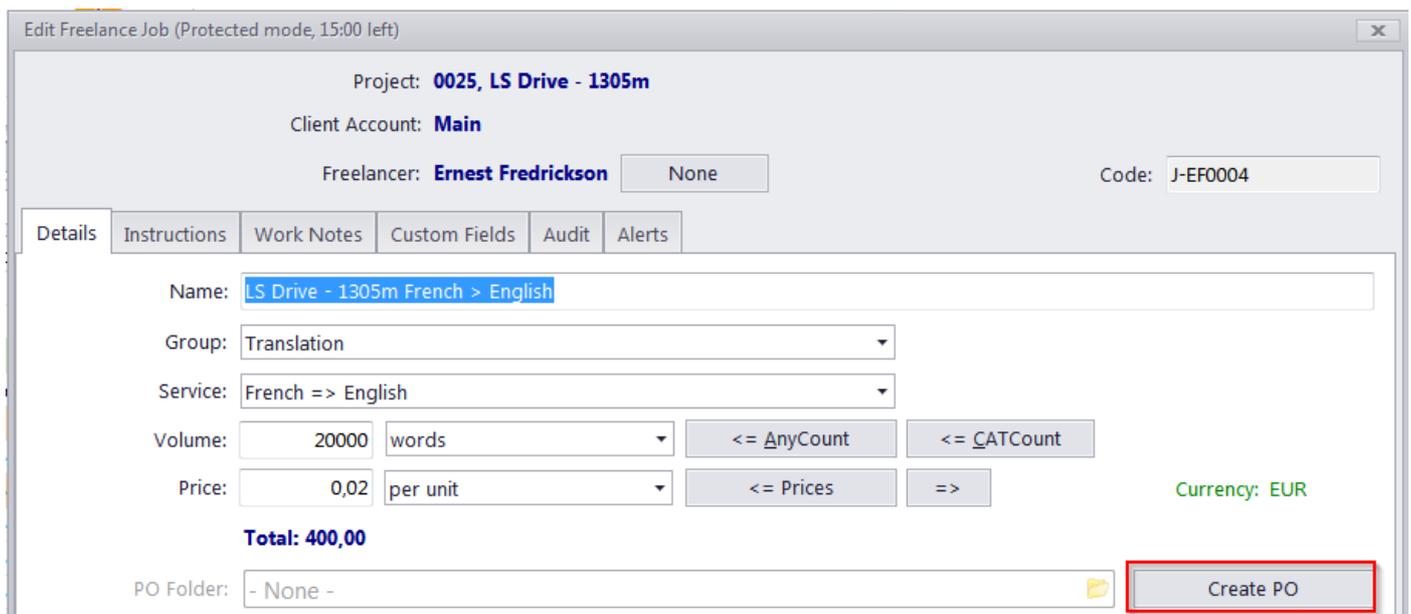


Invoices can also be created via the **Mass POs** function of the **Freelancers: POs** window.



Purchase orders can also be created directly from the **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 a purchase order. Freelance jobs can be found on the **Freelance Jobs** tab of the **Project** window.
2. In the **Edit Freelance Job** window click the **Create PO** button.
3. A freelance job can be added to an existing purchase order, or to a new one. Click the **Add this Job to New PO** string to create a new purchase order.



Freelance Jobs can be accessed in the following locations:

- The **Tree** tab of the **Project** window;
- The **Freelance Jobs** tab of the **Project** window;
- The **Freelance Jobs** tab of the **Freelancer** window;

- The **Calendar** tab of the **Project** window (double-click a calendar block to edit that job);
- The **Calendar** tab of the **Freelancer** window (double-click a calendar block to edit that job);
- The **Freelance Jobs** window;

 **Note:** Alternatively, purchase orders can be created by using the **Mass POs** function of the **POs to Freelancers** window.

---

See also:

[New/Edit PO Window](#)

[Mass purchase orders](#)

# New/Edit PO Window

The **New/Edit PO** window contains the following data:

**Date Sent** — the date when purchase order has been sent to freelancer. Payment terms of freelancer may refer to this date when determining the paid status of the PO.

**Code** — also called the "*Freelancer-specific*" code, generated automatically. The "*PO*" characters indicate that this is a purchase order code, the letters afterwards represent the code of the freelancer, and the number is the value of the expert's PO counter. Each freelancer has an independent counter for this code.

**Global Code** — the global code is generated automatically. The global PO code layout can be configured in the **Codes** section of the Backstage View **Administrator** tab. The non-configurable portion of the code (digits) represents the global PO counter value.

**Approved** — once a PO assignment has been approved by the project manager, its freelance jobs become locked and cannot be edited unless this checkbox is cleared.

**Freelance Jobs** — the list of freelance jobs added to this PO. Use the **Customize columns** option to configure displayed data.

**Discount/Markup** — POs can have up to 2 discounts and markups. These are applied as positive (markup) or negative (discount) percentages to the PO subtotal. To configure discounts and markups, in **Backstage** view click **Corporate Settings** and select the **Discounts/Markups** section.

**Tax** — each PO can have up to 2 taxes. Taxes are applied as percentages to PO subtotals plus discounts/markups. To configure taxes, in **Backstage** view click **Corporate Settings** and select the **Taxes** section.

 **Note:** After a discount/markup or tax has been selected for a PO of a freelancer, this discount/markup or tax will be remembered and applied as the default for the freelancer. All next POs will include this discount/markup or tax. The default discount/markup or tax can be changed in any time, by choosing another value during PO creation.

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

**Expert Invoice** — you can enter the freelancer's invoice data for future reference. POs can be filtered by their invoiced status.

**Adjustment** — adjustments added to PO totals. Discounts and taxes are not applied to adjustments.

**Linked with Payments** — to settle a PO, link it with your payments to freelancers. A PO can also be settled by creating a "*phantom payment*". By adding a phantom payment you link the entire unlinked sum of this PO to a virtual payment (will not be shown on the **Payments** tab of the **Freelancer** window).

**Notes** — any additional notes which your PO must include can be added on this tab.

**Custom Fields** - custom information can be entered or selected in proper custom fields on this tab. Custom database fields can be added in the Projetex Server Administrator.

**Audit** — keeps track of when and by whom the PO was modified.

**Alerts** — keeps track of messages received from the Projetex 3D Automation Engine.

Edit PO (Protected mode, 15:00 left)

From: **Vitaliy Gutyk** Date Sent: 16/12/2016  
 To: **Takumi Mizushima** Code: PO-TM0004  
 Project: **0052, GlobalSYS manual (consulting only)** Global Code: ACME-10049/2016  
 Project Manager: **William McSun**  
 Approved (Jobs Locked)

Freelance Jobs Adjustment Linked with Payments Notes Custom Fields Audit Alerts

* Completed	Project Code	Job Code	Job Name	Group of Services	Service	Units
16.12.2016 18:00	0052	J-TM0005	GlobalSYS manual (consul Consulting		Multilingual Copywrit	words

1 of 1

Discount/Markup 1: - None - (0,00%) **0,00**  
 Discount/Markup 2: - None - (0,00%) **0,00**  
 Net Jobs Total: **1000,00**  
 Tax 1: - None - (0,00%) **0,00**  
 Tax 2: - None - (0,00%) **0,00**

Currency: JPY  
 1 JPY = 0,0075 EUR

PO Total: **1000,00**  
 Paid: **0,00**  
 Balance Due: **1000,00**

Expert Invoice received  
 Invoice Code:   
 Invoice Date: - None -

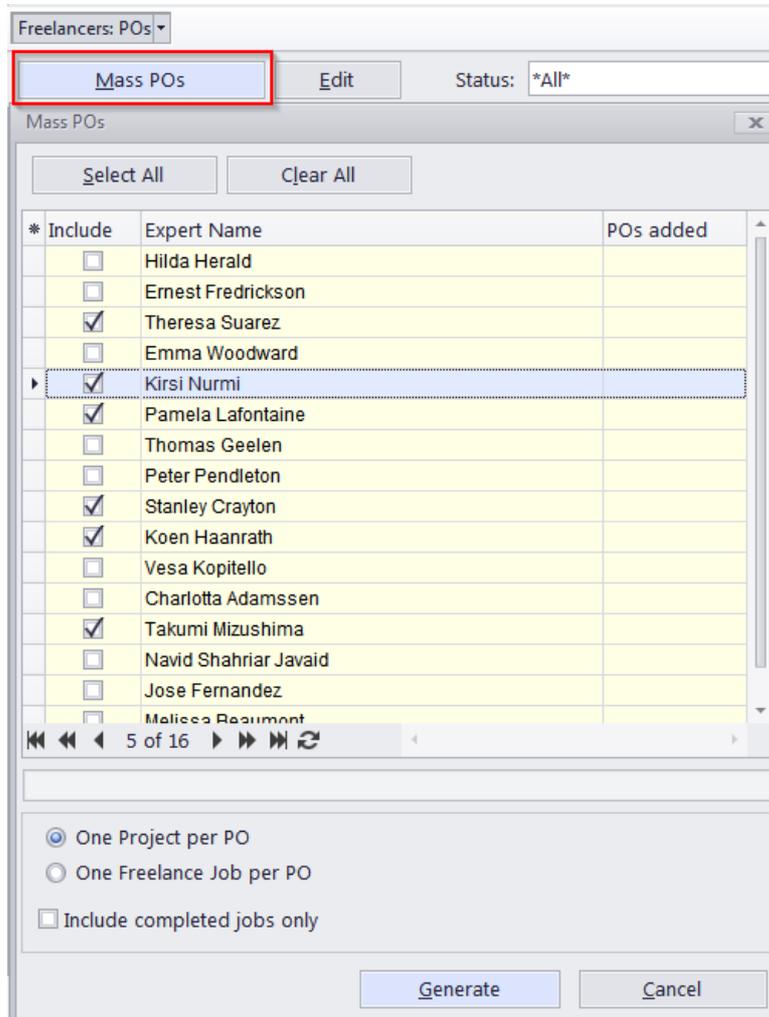
RTF Templates: Purchase Order to Freelancer - Template - English.rtf

See also:  
 Saving, Printing and E-Mailing Purchase Orders

# Mass purchase orders

Use the **Mass POs** feature to quickly issue purchase orders for a number of freelance jobs.

1. Open the **Freelancers: POs** window and click the **Mass POs** button (shortcut Alt+M).
2. This will open the **Mass POs** window:



Select the freelance experts for which POs should be created by double-clicking the check boxes in front of each expert

Select PO issuing options:

- **One Project per PO** (one PO for all freelance jobs in each project);
- **One Freelance Job per PO** (create a separate PO for each freelance job).

3. You may check **Include completed jobs only** to limit PO generation to completed jobs.

4. After selecting the required freelancers and setting up mass PO options, click the **Generate** button. The program will start creating purchase orders, which will be indicated by a progress bar.

5. Once all specified POs have been generated, the **Mass PO** window will display the number of generated purchase orders opposite to each freelancer.

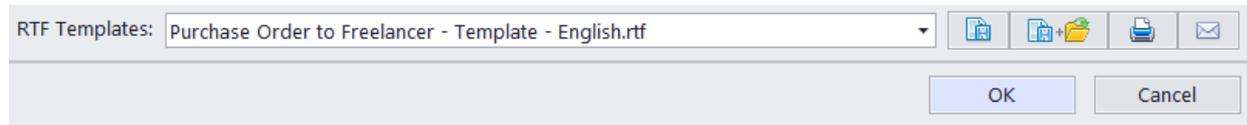
**Note:** Once the POs have been generated, they can be opened and edited in the **POs to Freelancers** window or on the **POs** tab of the **Freelancer** window.

See also:

Creating Purchase Orders

# Saving, Printing and E-Mailing Purchase Orders

To print, save or e-mail a **Purchase Order** as a text document, use the RTF template controls near the bottom of the **New/Edit** window.



Use the **RTF Templates** drop-down list to select the template which must be used for printing, saving or e-mailing this PO as an RTF file. Click the **Save**, **Save & Open**, **Print**, or **Send Mail** button to save, print, or e-mail the **PO**.

 **Note:** You can save the output file in *RTF*, *DOC* or *PDF* format by selecting this format in the **Save As** window via the **Save as type** drop-down list.

To edit templates for purchase orders, in the **Backstage** view click **Corporate Settings** and then click **Templates**. **Templates** for purchase orders are located in the *D:\BusinessServer\Templates\EXPERTS\FREELANCE\POs* folder.

---

See also:

[New/Edit PO Window](#)

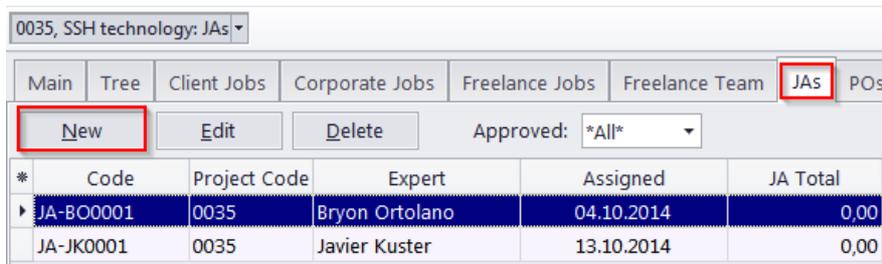
[Template Basics](#)

# Creating Job Assignments

*Job assignments* (or "JAs") are printable requests which project managers send to in-house experts. Job assignments contain a number of *corporate jobs* and optionally — some *instructions*. Also, a folder can be automatically created for each *JA*, allowing project managers to copy workflow files for the specific expert to access.

To create a job assignment to translator:

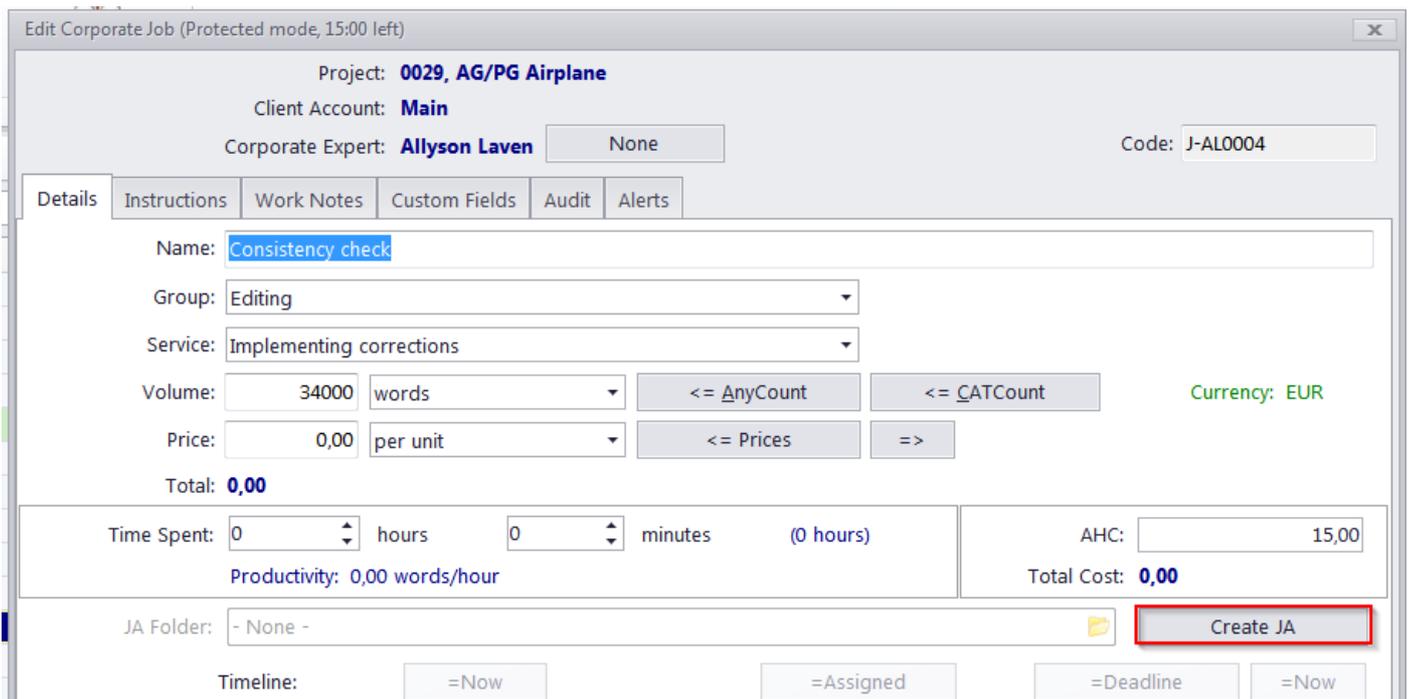
1. Open the **Main** tab of the **Project** window and click the required project.
2. Click the **JAs** tab.
3. Click the **New** button. You will be prompted to choose a corporate expert among those assigned to the project's jobs before being taken to the **New JA** window.



* Code	Project Code	Expert	Assigned	JA Total
JA-BO0001	0035	Bryon Ortolano	04.10.2014	0,00
JA-JK0001	0035	Javier Kuster	13.10.2014	0,00

Job assignments can also be created directly from the **Edit Corporate Job** window. To create a job assignment this way:

1. Open any corporate job, which has an expert assigned, but has not yet been added to a job assignment. Corporate jobs can be opened on the **Corporate Jobs** tab of the **Project** window.
2. In the **Edit Corporate Job** window click the **Create JA** button.



Project: **0029, AG/PG Airplane**  
Client Account: **Main**  
Corporate Expert: **Allyson Laven**  Code:

Details | Instructions | Work Notes | Custom Fields | Audit | Alerts

Name:   
Group:   
Service:   
Volume:  words   Currency: EUR  
Price:  per unit    
Total: **0,00**

Time Spent:  hours  minutes (0 hours) AHC:   
Productivity: 0,00 words/hour Total Cost: **0,00**

JA Folder:

Timeline:

See also:

New/Edit JA Window

# New/Edit JA Window

The **New/Edit JA** window contains the following data:

**Date Assigned** — the job assignment date can be edited no matter when the JA has actually been created.

**Code** — a unique JA code is created automatically along with the job assignment itself. The first characters "JA" indicate that this is a job assignment code, the letters afterwards represent the assigned expert's code. The number is the value of the JA counter for the assigned expert. Each expert has an independent counter for the job assignment code.

**Approved** — once a job assignment has been approved by the project manager, its corporate jobs become locked and cannot be edited unless this check box is cleared.

**Expert Jobs** — the list of corporate jobs added to the JA. Only Jobs without a JA can be added.

**Linked with Payments** — to settle a JA, link it with your payments to the corporate expert. A JA can also be settled by creating "phantom payments". By adding a phantom payment you link the entire unlinked sum of this JA to a virtual payment (will not be shown on the **Payments** tab of the **Corporate Expert** window).

**Instructions** — any additional instructions which your JA must include, can be added on this tab

**Notes** — any additional notes which your JA must include, can be added on this tab.

**Custom Fields** - custom information can be entered or selected in proper custom fields on this tab. Custom database fields can be added in the Projotex Server Administrator.

**Audit** — keeps track of when and by whom the JA was modified.

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

The screenshot shows the 'Edit JA' window with the following details:

- Corporate Expert: **Sheryl Hirsch**
- Date Assigned: 27/03/2014
- Project: **0026, Localization of H-210 instruction**
- Code: JA-SH0002
- Approved (Jobs Locked)

Navigation tabs: Expert Jobs (selected), Linked with Payments, Instructions, Custom Fields, Audit.

Buttons: Add Job to JA, Edit Job, Remove Job from JA.

* Assigned	Job Code	Job Name	Group of Serv	Service	Volume	Units	Price	Pricing	To
02.11.2016	J-SH0003	H-210 instruction t	Translation	English => Sw	4000	words	280,67	flat fee	280,67

Summary statistics (Currency: EUR):

- JA Total: **280,67**
- Paid: **0,00**
- Balance Due: **280,67**

RTF Templates: Job Assignment - Template - English.rtf

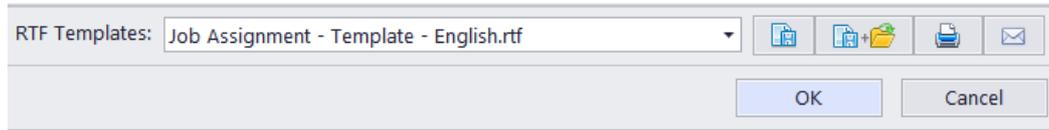
Buttons: Mark as Paid, OK, Cancel.

See also:

Saving, Printing and E-Mailing Job Assignments

# Saving, Printing and E-Mailing Job Assignments

To print, save or E-mail a job assignment as a file with the help of *RTF templates*, use the RTF template controls near the bottom of the **New/Edit** window.



Use the **RTF Templates** drop-down list to select the template which must be used for printing, saving or e-mailing this JA as an RTF file. Click the **Save**, **Save & Open**, **Print**, or **Send Mail** button to save, print, or e-mail this JA.

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

To edit templates for printing job assignments, in the **Backstage** view click **Corporate Settings**. Click the **Templates** section to quickly access all template folders. Templates for printing client jobs are stored in the *D:\BusinessServer\Templates\EXPERTS\CORPORATE\JAs* folder.

---

See also:

[Creating Job Assignments](#)

[Template Basics](#)

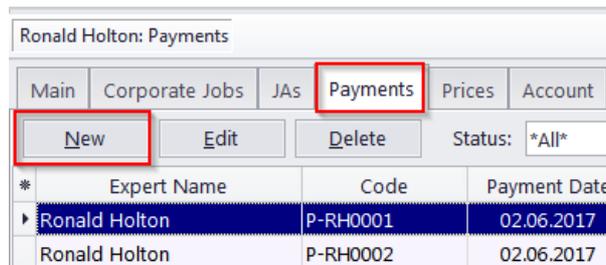
# Creating Payments

*Payments* are records of the funds received from clients and given to experts for their services, and are used to settle Invoices, Purchase orders, and Job Assignments.

To create a payment:

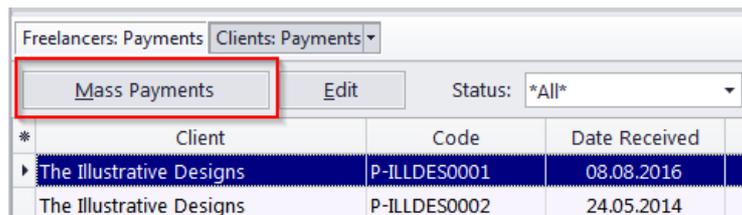
1. Open the **Main** tab of the **Client/Corporate Expert/Freelancer** window.
2. Click required record and switch to the **Payments** tab.
3. Click **New** button.

(Screenshot shows the Payment tab of the Corporate Expert window)



Ronald Holton: Payments						
Main	Corporate Jobs	JAs	Payments	Prices	Account	
			<b>New</b>	Edit	Delete	Status: *All*
*	Expert Name	Code	Payment Date			
▶	Ronald Holton	P-RH0001	02.06.2017			
	Ronald Holton	P-RH0002	02.06.2017			

Invoices can also be created via the **Mass Payments** function of the **Clients: Payments** and **Freelancers: Payments** windows.



Freelancers: Payments					
Clients: Payments					
			<b>Mass Payments</b>	Edit	Status: *All*
*	Client	Code	Date Received		
▶	The Illustrative Designs	P-ILLDES0001	08.08.2016		
	The Illustrative Designs	P-ILLDES0002	24.05.2014		

Payments can also be created and linked automatically from the **Edit Invoice/PO/JA** window. To create a payment this way:

1. Open any invoice, PO, or JA that has not been paid yet.
2. In the **Edit Invoice/PO/JA** window, click the **Mark As Paid** button.

This will automatically create a payment that completely covers the invoice/PO/JA and link it to the invoice/PO/JA in question.

Edit JA (Protected mode, 15:00 left)

Corporate Expert: **Latoya Pittman** Date Assigned: 26/07/2014

Project: **0025, LS Drive - 1305m** Code: JA-LP0002

Approved (Jobs Locked)

Expert Jobs | Linked with Payments | Instructions | Custom Fields | Audit

* Assigned	Job Code	Job Name	Group of Serv	Service	Volume	Units	Price Pricing	To
01.12.2014	J-LP0001	LS Drive - 1305m - Translation		English => Sw	25000	words	234,00 flat fee	234,

1 of 1

Currency: EUR

JA Total: **234,00**  
Paid: **0,00**  
Balance Due: **234,00**

RTF Templates: Job Assignment - Template - English.rtf

See also:

New/Edit Payment Window

Mass Payments from Clients

Mass Payments to Freelancers

# New/Edit Payment Window

The **New/Edit Payment** window contains the following data:

**Date Received** — except for accountant's reference, this date will also be used by Global Date filter.

**Code** — the payment code is generated automatically. In this code, the "P" character means that this is a payment, the letters afterwards represent the code of the client (or expert), and the number is the value of the payment counter for the client/expert. Each client and expert has an independent code counter for payments.

**Value** — the total amount of payment in client's or expert's currency. Projetex will calculate your revenues in your base currency according to the exchange rates.

If a client's or expert's currency differs from your base currency, the **Currency Exchange Rate** button will be available. By clicking this button, you may change the *currency exchange rate* used in this *payment*. Note that this button does not change the general exchange rate stored in your Projetex database. To change the exchange rate for all future payments, go to the Exchange Rates tab of the Corporate Settings.

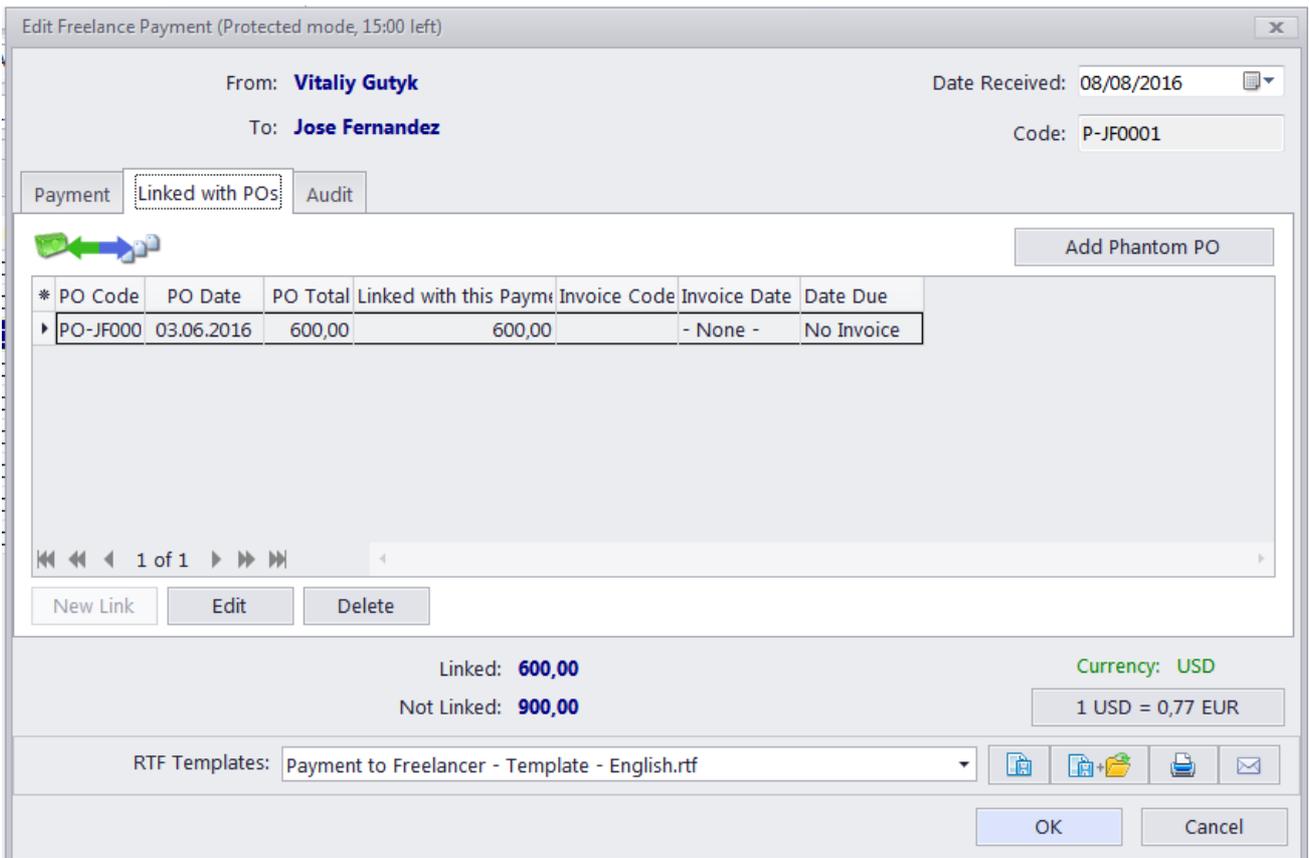
**Notes** — any additional notes by accounting or other staff. For example if this is an advance payment for a future project.

**Linked with Invoices/POs/JAs** — a payment's value can be linked with invoices, purchase orders, or job assignments — fully or partially. The table on the **Linked with Invoices/POs/JAs** tab indicates which amount is linked to which invoice/purchase order/job assignment.

 **Note:** The target in the **Linked with...** tab depends on whether the payment was created in the Payments tab of the **Client, Corporate Expert, or Freelancer** windows.

**Phantom invoices/POs/JAs** mean to make the payment linked, without settling any of the actual invoices, job assignments, or purchase orders. Phantom invoices/POs/JAs can be used for ensuring account consistency in case the payment for some reason should not be used to cover invoices, job assignments, or purchase orders.

**Audit** — keeps track of when and by whom the payment was modified.

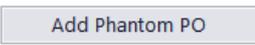


Edit Freelance Payment (Protected mode, 15:00 left)

From: **Vitaliy Gutyk** Date Received: 08/08/2016

To: **Jose Fernandez** Code: P-JF0001

Payment **Linked with POs** Audit



* PO Code	PO Date	PO Total	Linked with this Payment	Invoice Code	Invoice Date	Date Due
PO-JF000	03.06.2016	600,00	600,00	- None -		No Invoice

1 of 1

New Link Edit Delete

Linked: **600,00** Currency: USD  
Not Linked: **900,00** 1 USD = 0,77 EUR

RTF Templates: Payment to Freelancer - Template - English.rtf

OK Cancel

See also:

Linking Payments with Invoices, POs or JAs

Saving, Printing and E-Mailing Payments

# Linking Payments with Invoices, POs or JAs

Any invoice, PO or JA in Projetex will be always shown as outstanding unless it is linked with proper payment, that completely covers this invoice, PO, or JA amount.

To create a link between a payment and an invoice/PO/JA:

1. Open the required **Payment** record and switch to the **Linked with...** tab

**Note:** The target in the **Linked with...** tab depends on whether the payment was created in the Payments tab of the **Client, Corporate Expert,** or **Freelancer** windows.

2. Click the **New link** button and select the invoice/PO/JA to create a link with

3. Click **OK** twice to complete linking

The screenshot shows the 'Edit Payment' window with the 'Linked with Invoices' tab selected. A 'Select Invoice' dialog is open, showing a table of 'Approved Unsettled Invoices'. The 'New Link' button is highlighted in red.

* Invoice Code	Invoice Date	Invoice Total	Linked with this Payment	Balance	Date
I-TDES0004	16.06.2017	800,00		800,00	16.07.2017

**Note:** A new link will automatically cover as much of the invoice/PO/JA amount as possible. To change the linked amount select the link and click Edit.

The screenshot shows the 'Edit Payment' window with the 'Linked with Invoices' tab selected. The 'Edit Link with Invoice' dialog is open, showing the 'Link Value' field set to 500,00. The 'Edit' button is highlighted in red.

* Invoice Code	Invoice Date	Invoice Total
I-TDES0004	16.06.2017	800,00

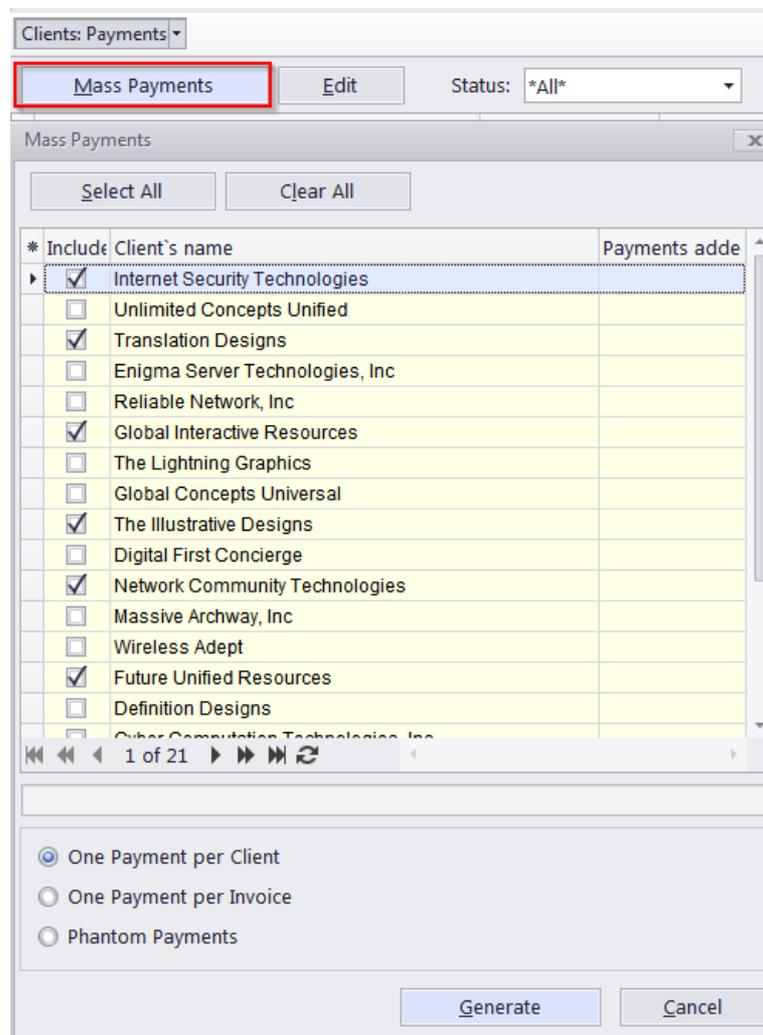
See also:

New/Edit Payment Window

# Mass Payments from Clients

Multiple payments from clients can be created according to existing invoices and linked with them.

1. To open the **Mass Payments** window, open the **Clients: Payments** window and then click the **Mass Payments** button (shortcut Alt+M).



2. This will open the **Mass Payments** window:

Select the clients, whose invoices you wish to mark as paid, by double-clicking the check box in front of each.

Select one of the available payment generation methods:

- **One Payment per Client** (one payment from each Client, covering the whole due amount of outstanding invoices);
- **One Payment per Invoice** (separate payments, covering the due amount of each outstanding invoice).
- **Phantom Payments** (phantom payments will be created to cover the unpaid balance of invoices).

3. After selecting the required clients and setting up mass payment options, click the **Generate** button. The program will start creating payments, which will be indicated by a progress bar.

4. Once all specified payments have been generated, the **Mass Payments** window will display the number of new payments created for each client.

**Note:** Once the payments have been generated, they can be opened and edited in the **Payments from Clients** window or the **Payments** tab of the **Client** window.

See also:

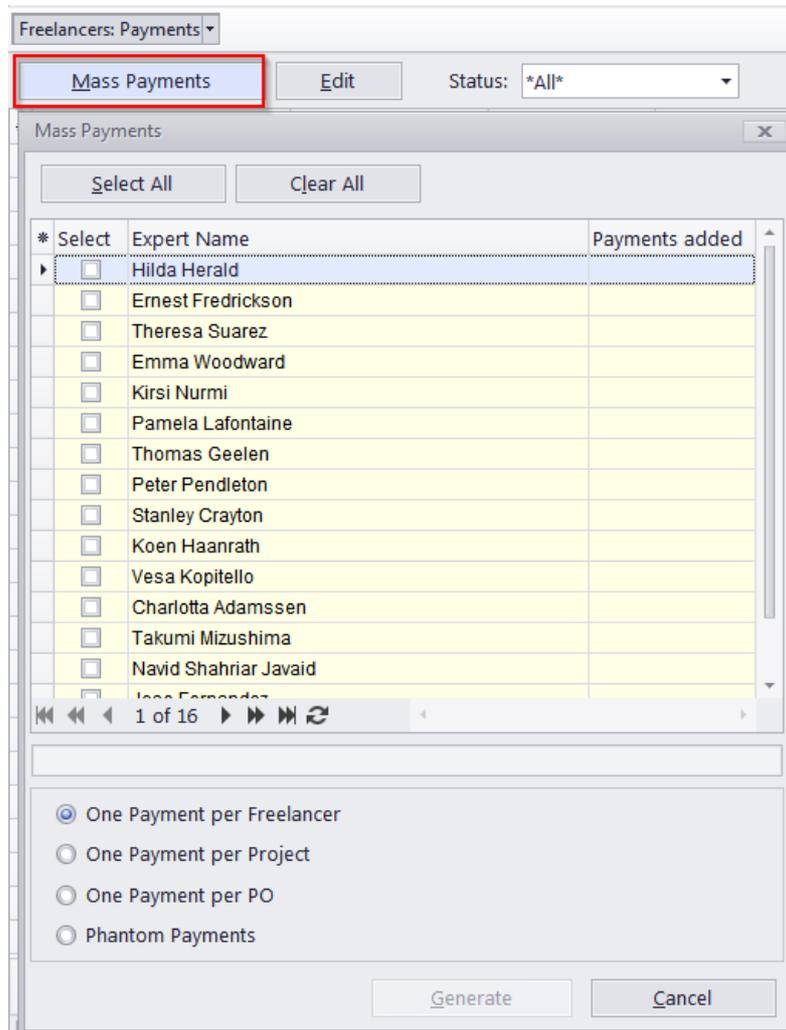
Mass Payments to Freelancers

Creating Payments

# Mass Payments to Freelancers

Multiple payments to freelancers can be created in the same way as multiple payments from clients.

1. To open the **Mass Payments** window, open the **Payments to Freelancers** window first, and then click the **Mass Payments** button (shortcut Alt+M).



2. This will open the **Mass Payments** window:

Select the experts whose POs need to be paid by double-clicking the check boxes in front of each.

Select one of the available payment options:

- **One Payment per Freelancer** (one payment to each Freelancer, covering the whole due amount of outstanding POs);
- **One Payment per Project** (separate payments, covering the total amount of POs in each Project).
- **One Payment per PO** (separate payments, covering the total amount each PO).
- **Phantom Payments** (generate phantom payments for the total unpaid amount of each PO).

3. After selecting the required freelancers and setting up mass payment options, click the **Generate** button. The program will start creating payments, which will be indicated by a progress bar.

4. Once all specified payments have been generated, the **Mass Payments** window will display the number of generated payments for each freelancer.

**Note:** Once the payments have been generated, they can be opened and edited in the **Payments to Freelancers** window or the **Payments** tab of the **Freelancer** window.

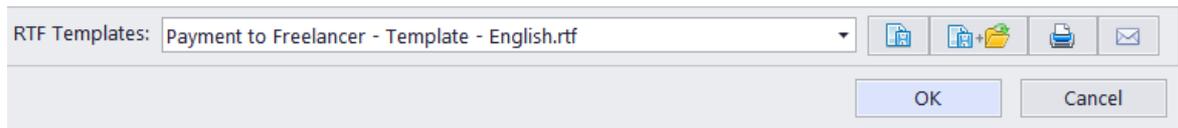
See also:

Mass Payments from Clients

Creating Payments

# Saving, Printing and E-Mailing Payments

To print, save or E-mail a **Payment** as a text document, use the RTF template controls near the bottom of the **New/Edit** window.



Use the **RTF Templates** drop-down list to select the template which should be used for printing, saving or e-mailing a payment as an RTF file. Click the **Save**, **Save & Open**, **Print**, or **Send Mail** button to save, print, or e-mail the payment.

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

To edit templates for payments, in the **Backstage** view click **Corporate Settings** and select **Templates**. **Templates** for payments are located in the following folders:

- *D:\BusinessServer\Templates\CLIENTS\Payments\* folder for client payments.
- *D:\BusinessServer\Templates\EXPERTS\FREELANCE\Payments\* folder for payments to freelancers.
- *D:\BusinessServer\Templates\EXPERTS\CORPORATE\Payments\* folder for payments to corporate experts.

---

See also:

New/Edit Payment Window

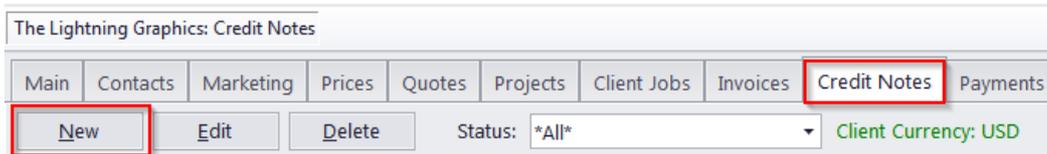
Template Basics

# Creating Credit Notes

Credit notes can be created on the **Credit Notes** tab of the **Client** window.

To create a credit note to a client,

1. Open the **Main** tab of the **Client** window and select a client
2. Switch to the **Credit Notes** tab.
3. Click the **New** button. You will be prompted to select the invoice that the credit note will be linked with before being taken to the **New Credit Note** window.



---

See also:

[New/Edit Credit Note Window](#)

# New/Edit Credit Note Window

The **New/Edit Credit Note** window contains the following data:

**Date Sent** — this date is considered the credit note's issue date (no matter when the credit note has actually been created).

**Credit Note Code** — a credit note ID number, generated automatically. The "CN" characters mean that this is a credit note, the letters afterwards represent the client code and the number is the value of the credit note counter for this client. Each client has an independent counter for this code.

**Linked Invoice Code** — the code of the invoice linked to this credit note during creation.

**Value** — the total value of the credit note in the client's currency. Projetex will calculate the equivalent in your base currency according to the exchange rates.

**Notes** — any additional notes which your credit note must include, can be added on this field. These notes can be automatically added to the printed credit note.

**Tax** — each credit note can have up to 2 taxes. Taxes are applied as percentages to credit note subtotals. To configure taxes, in the Backstage view click **Corporate Settings** and select the **Taxes** section.

**Note:** After a tax has been selected for a client's credit note, this tax will be remembered and applied as the default for the client. All next credit notes will include this tax. The default tax can be changed in any time, choosing another value during credit note creation.

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

**Linked Invoice** — displays the basic information of the invoice linked to this credit note.

**Linked Refunds** — on this tab you can check whether this credit note has been linked with any refunds. Refunds can be linked to credit notes from the **Edit Refund** window only.

**Audit** — keeps track of when and by whom the credit note was modified.

The screenshot shows the 'Edit Credit Note' window with the following details:

- From:** Vitaliy Gutyk
- To:** The Illustrative Designs
- Date Sent:** 01/03/2017
- Credit Note Code:** CN-ILLDES0001
- Linked Invoice Code:** I-ILLDES0002
- Value:** 300,00
- Tax:** - None - (0,00%) **0,00**
- Tax 2:** - None - (0,00%) **0,00**
- Credit Note Total:** 300,00
- Credits Used:** 0,00
- Paid:** 150,00
- Balance Due:** 150,00
- Status:** Partially Paid
- Client Currency:** EUR
- Refunds started. Credit Note is Locked.**
- Notes:** (Empty text area)
- RTF Templates:** Credit Note to Client - Template - English.rtf

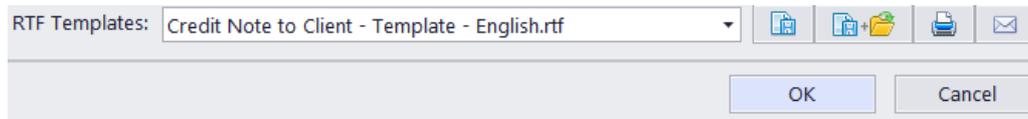
See also:

[Saving, Printing and E-Mailing Credit Notes](#)



# Saving, Printing and E-Mailing Credit Notes

To print, save or e-mail a **Credit Note** as an RTF document, use the RTF template controls near the bottom of the **New/Edit** window.



Use the **RTF Templates** drop-down list to select the template which must be used for printing, saving or e-mailing this credit note as an RTF file. Click the **Save**, **Save & Open**, **Print**, or **Send Mail** button to save, print, or e-mail the **Credit Note**.

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

To edit templates for credit notes, in the **Backstage** view click **Corporate Settings** command and select **Templates**. Templates for credit notes are located in the *C:\BusinessServer\Templates\CLIENTS\Credit Notes\* folder.

---

See also:

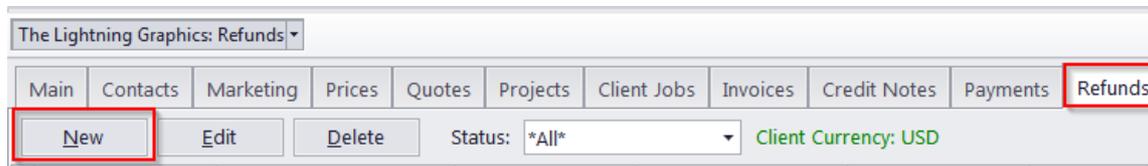
New/Edit Credit Note Window

# Creating Refunds

*Refunds* are records of the funds returned to clients, and are used to settle Credit notes

To create a Refund:

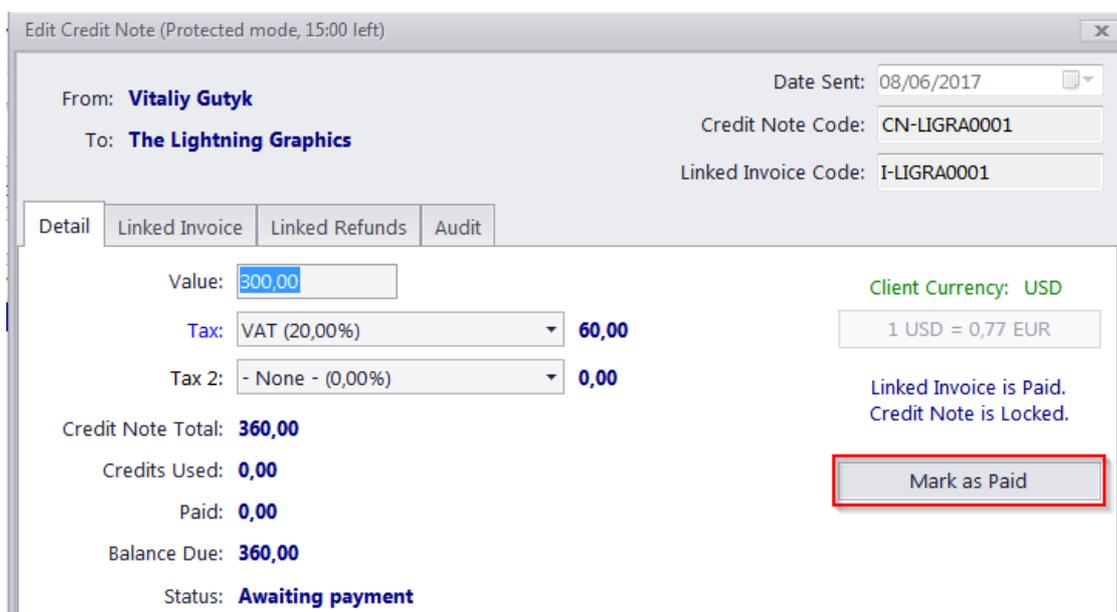
1. Open the **Main** tab of the **Client** window and select a project.
2. Switch to the **Refunds** tab and click the **New** button.



Refunds can also be created and linked automatically from the **Edit Credit Note** window. To create a refund this way:

1. Open any credit note that has not been paid yet.
2. In the **Edit Credit Note** window click the **Mark As Paid** button.

This will automatically create a Refund that completely covers the credit note and link it to the credit note in question.



See also:

New/Edit Refund Window

# New/Edit Refund Window

The **New/Edit Refund** window contains the following data:

**Date Received** — apart from accountant's reference, this date will also be used by the Global Date filter.

**Code** — the refund code is generated automatically. In this code, the "R" character means that this is a refund, the letters afterwards represent the client (or freelancer) code, and the number is the value of the refund counter for this client/freelancer. Each client and freelancer has an independent code counter for refunds.

**Value** — the total amount of the refund in the client's currency. Projetex will calculate the equivalent in your base currency according to the exchange rates.

If the client or freelance currency differs from your base currency, the **Currency Exchange Rate** button will be available. By clicking this button, you may change the *currency exchange rate* used in this *refund*. Note that this button does not change the general exchange rate stored in your Projetex database. To change the exchange rate for all future refunds, go to the Exchange Rates tab of the Corporate Settings.

**Notes** — any additional notes by accounting or other staff.

**Linked with Credit Notes** — the refund value can be linked with credit notes — fully or partially. The table on the **Linked with Credit Notes** tab indicates which amount is linked to which credit note

**Audit** — keeps track of when and by whom the refund was modified.

The screenshot shows the 'Edit Refund' window with the following details:

- To:** The Lightning Graphics
- From:** Vitaliy Gutyk
- Date Sent:** 08/06/2017
- Code:** R-LIGRA0001
- Value:** 360,00 (Linked with Credit Notes. Value of Refund is Locked.)
- Notes:** (Empty text area)
- Linked:** 260,00
- Not Linked:** 100,00
- Client Currency:** USD
- Exchange Rate:** 1 USD = 0,77 EUR
- RTF Templates:** Refund to Client - Template - English.rtf
- Buttons:** OK, Cancel

See also:

[Linking Refunds with Credit Notes](#)

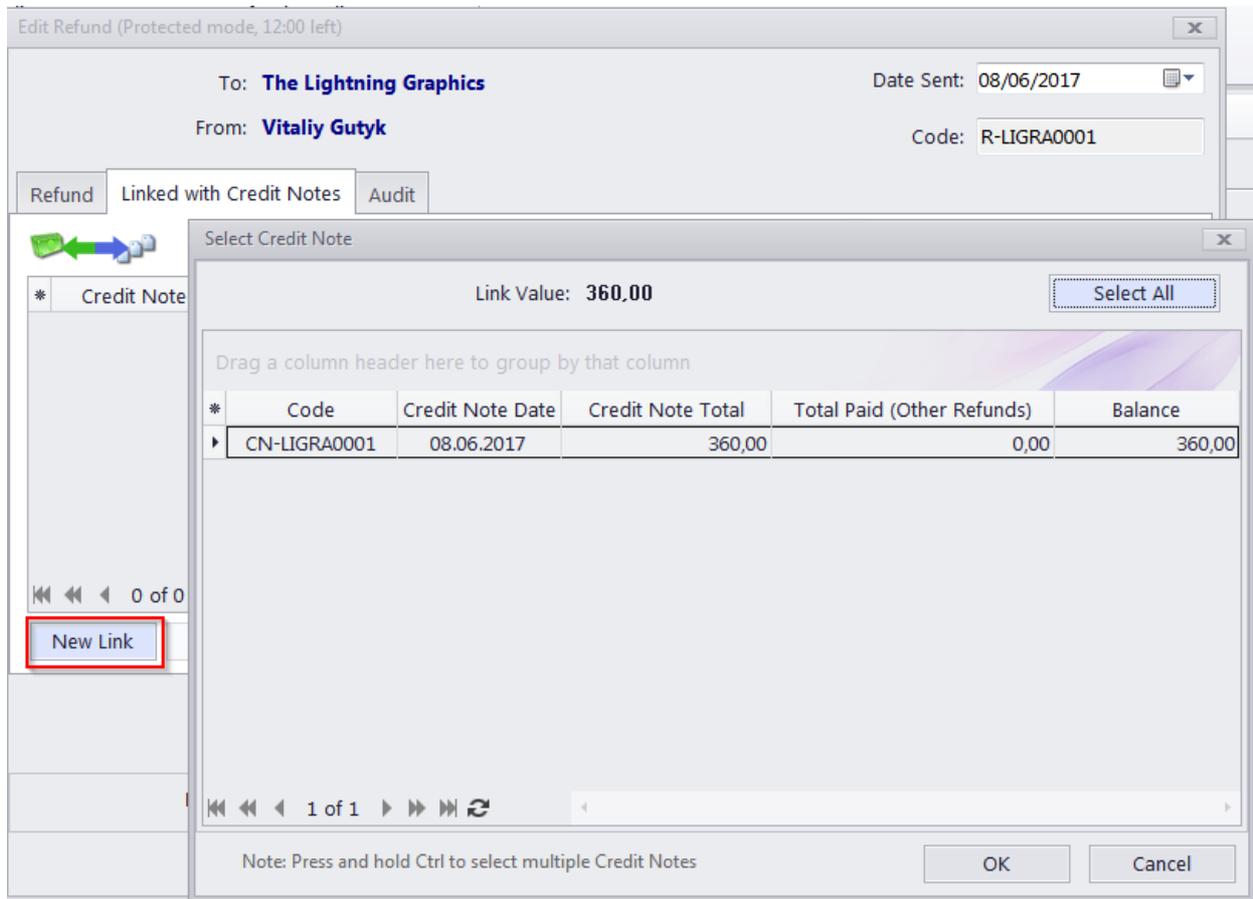
[Saving, Printing and E-Mailing Refunds](#)

# Linking Refunds with Credit Notes

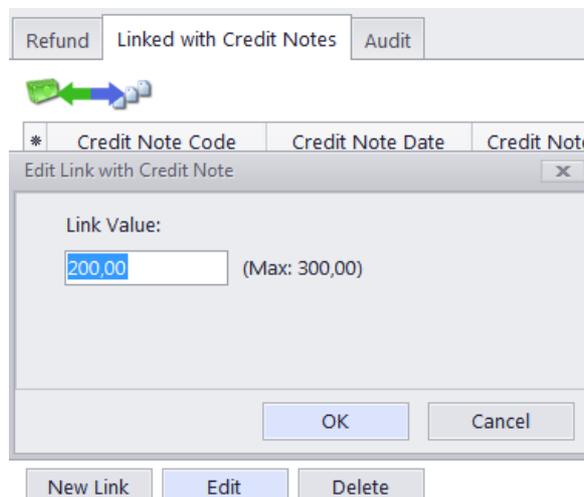
Any credit note in Projetex will not be shown as paid unless it is linked with a proper refund, that completely covers this credit note.

To create a link between a refund and a credit note:

- Open the required **Refund** record for editing and switch to the **Linked with...** tab
- Click the **New link** button and select the credit note to link with
- Click **OK** twice to complete the link



**Note:** A new link will automatically cover as much of the credit note amount as possible. To change the linked amount select the link and click Edit.

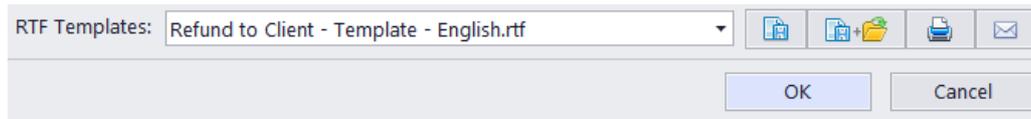


See also:



# Saving, Printing and E-Mailing Refunds

To print, save or E-mail a **Refund** as a text document, use the RTF template controls near the bottom of the **New/Edit** window.



Use the **RTF Templates** drop-down list to select the template which should be used for printing, saving or e-mailing this refund as an RTF file. Click the **Save**, **Save & Open**, **Print**, or **Send Mail** button to save, print, or e-mail the Refund.

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

To edit templates for refunds, in the **Backstage** view click **Corporate Settings** and select **Templates**. **Templates** for refunds are located in the *D:\BusinessServer\Templates\CLIENTS\Refunds\*.

---

See also:

[New/Edit Refund Window](#)

[Template Basics](#)

# Data Import Utility

The Projetex 3D Data import Utility is used to import information about Clients and Freelancers from outside sources without the need to manually enter it.

The utility can import data from the following file types: XLS and XLSX (Microsoft Excel), TXT, CSV, DBF (dBase 3, 4 and 5), XML (Data Packet 2.0)

Import settings can also be saved in special scenario files, allowing you to import data from the same source regularly, without having to fiddle with the settings every time.

**NOTE:** It is highly recommended to backup your database before using the Data Import utility. This will allow you to quickly roll back unintended or undesired changes.

The next topics will cover the process of importing data from the different file formats.

---

See also:

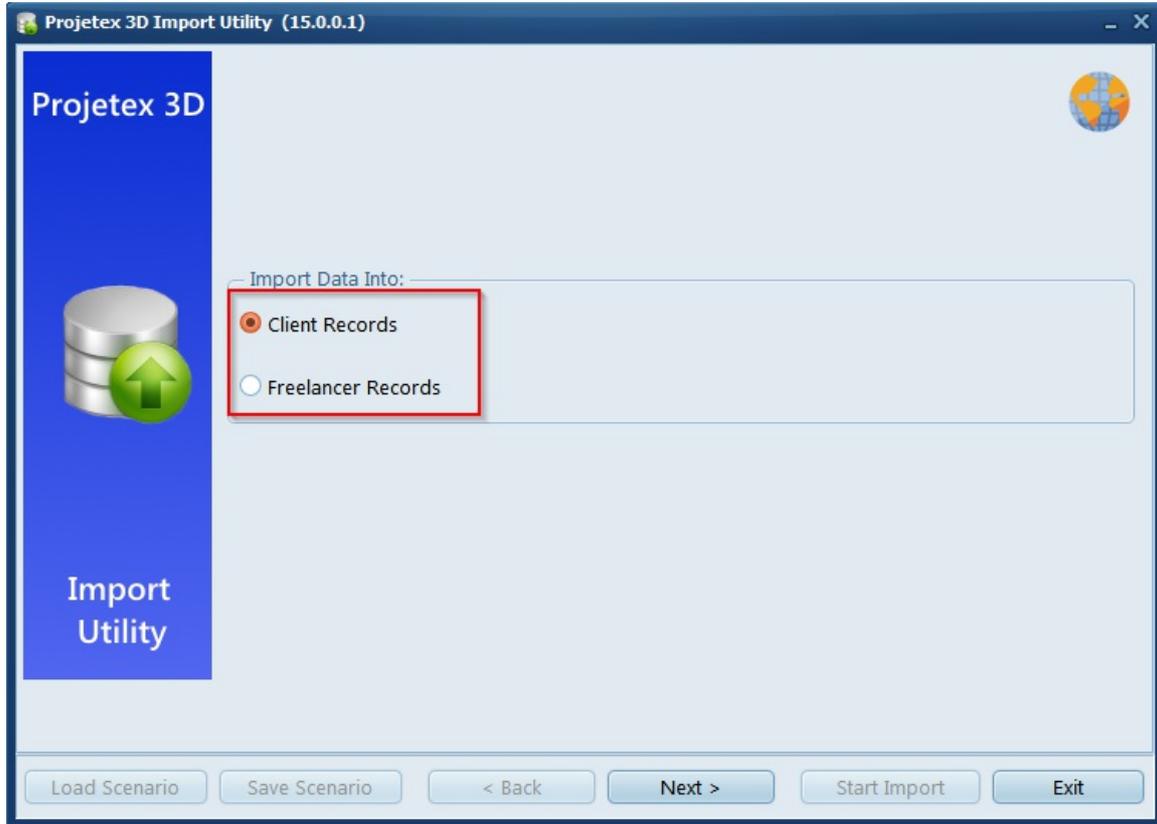
[Selecting the mode and file](#)

[Importing Custom Queries](#)

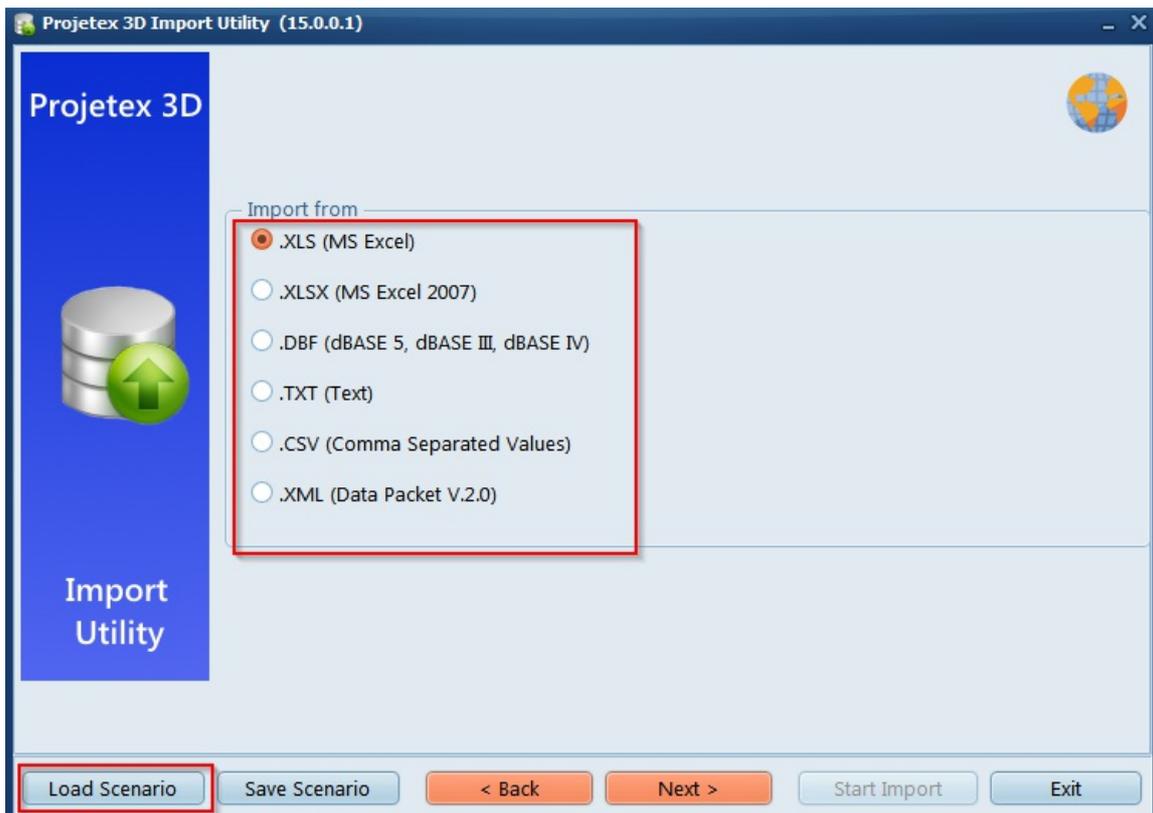
[Importing Custom Reports](#)

# Selecting the mode and file

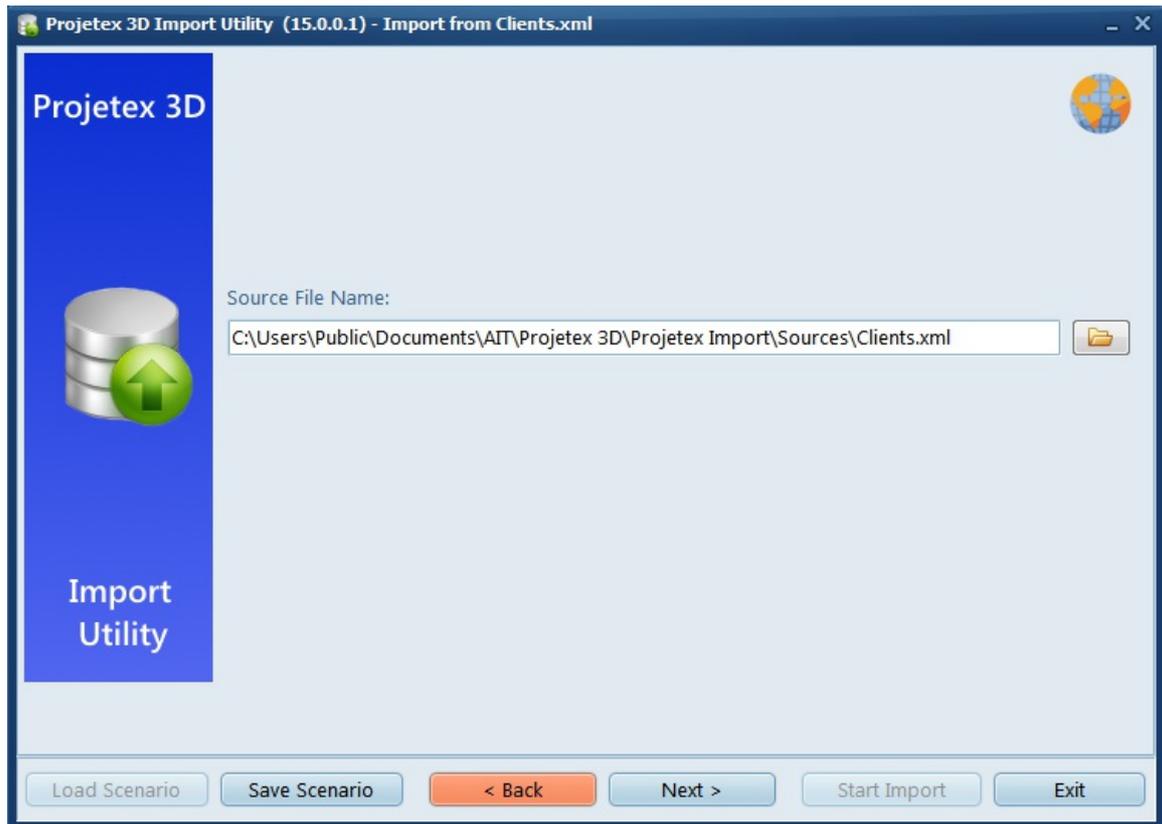
The first step when using the Data import utility is choosing whether you are importing Clients or Freelancers. Once the import is complete the data will be added to the corresponding table in Projetex.



Next, you choose the format of the source file. This is the step at which you can load a scenario file.



Finally, you select the actual source file. If you loaded a scenario beforehand, the file path to the source file will likely be pre-entered.



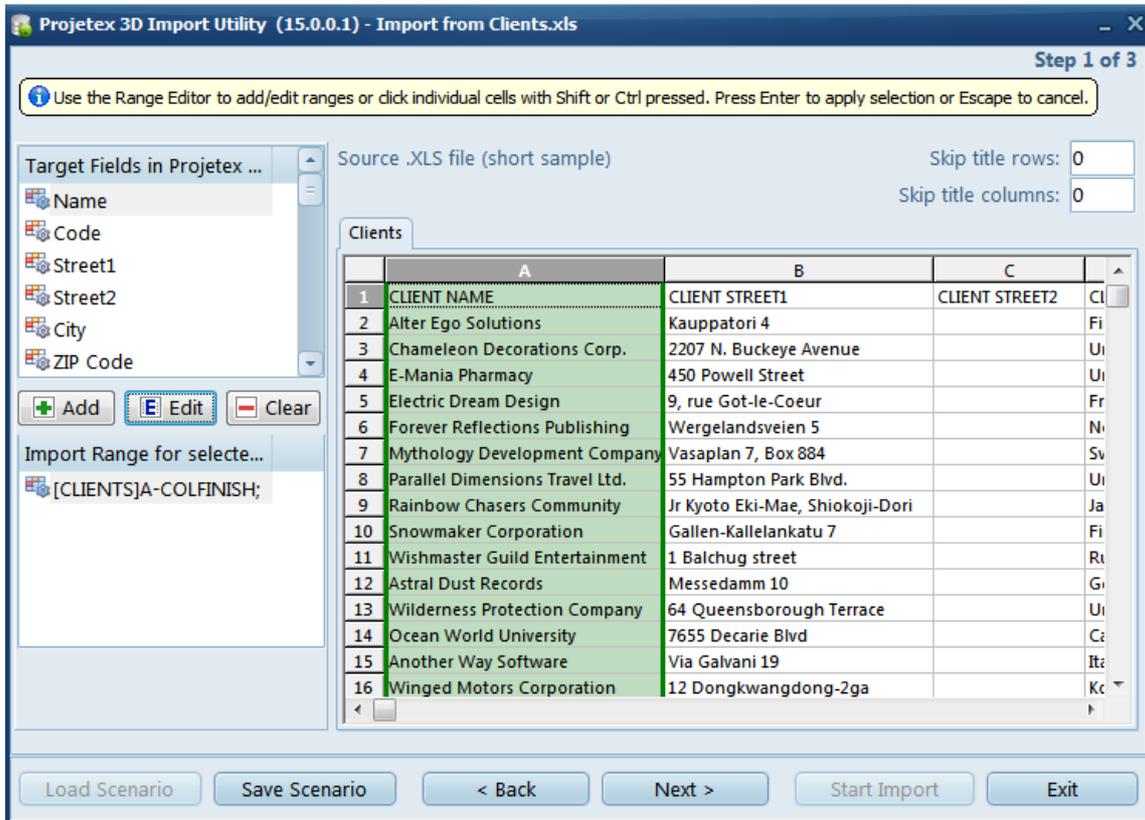
The next screen is the Range Editor. Its appearance will vary depending on the chosen format. See the topics for each format for more details: XLS, XLSX, DBF, TXT, CSV, XML.

---

See also:  
Import Scenarios

# XLS Range Editor

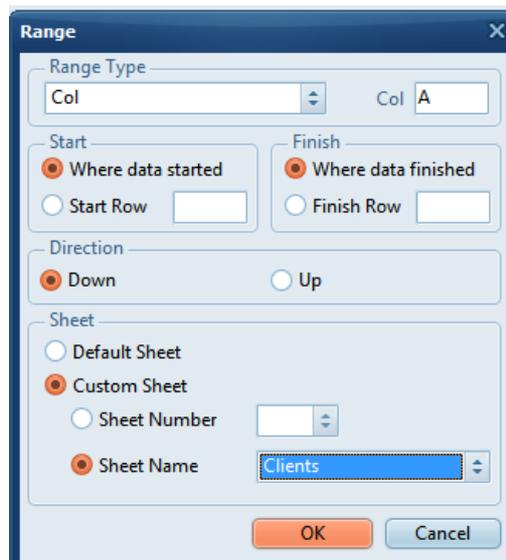
Used for pre-2007 Microsoft Excel files.



The two main elements are the **Target Field List** in the upper-left, and the file contents on the right side of the screen.

To designate a range of cells to be imported into a field of the Client (or Freelancer) table in Projetex, select the target field and click **Add**.

This will bring up the New/Edit Range dialog:



Here you can determine the range's type (row or column or single cell), its location and boundaries, as well as the direction in which the data in it should read.

A single target field can have multiple ranges. An existing range can be edited or removed.

Alternatively, you can hold **Ctrl** or **Shift** and click the rows/columns/cells you want to add to a particular range. Press **Enter** to

confirm your selection or **Escape** to cancel it.

If the table has a number of title rows and/or columns, they can be skipped by inputting their number into the **Skip title rows/columns** filed in the upper-right corner of the main editor.

---

See also:

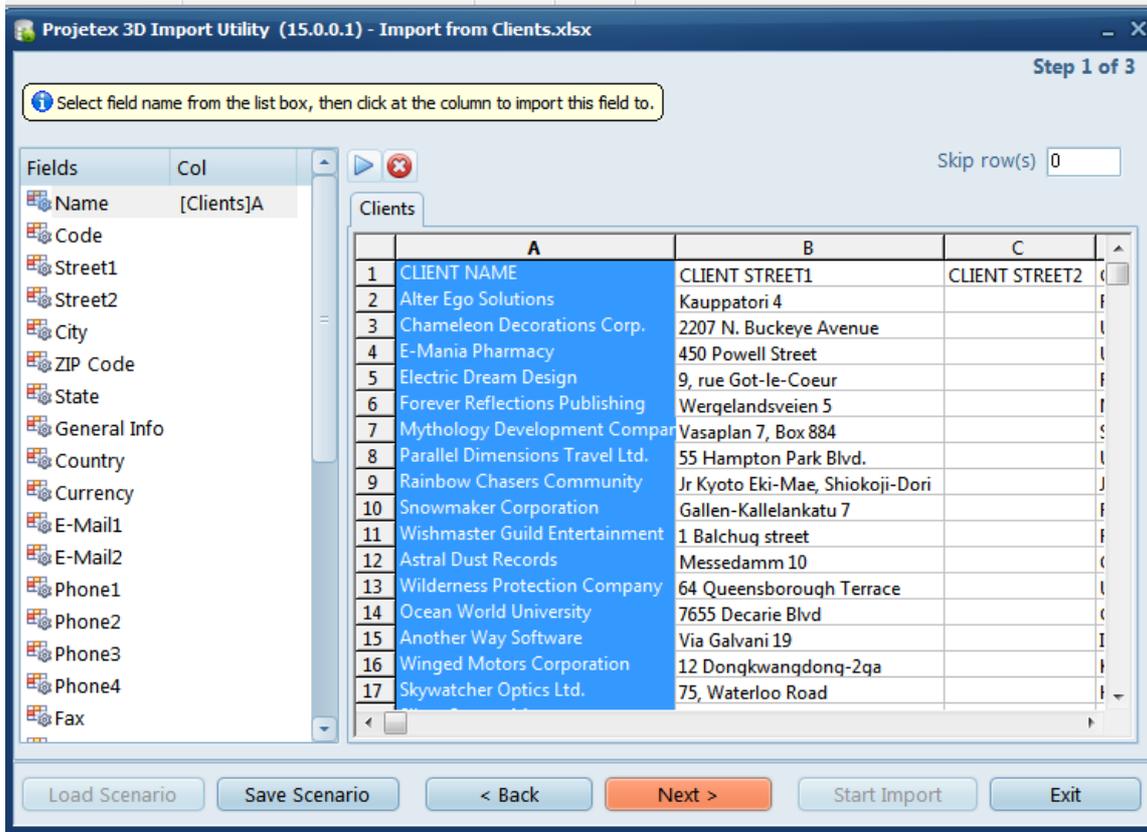
[Selecting the mode and file](#)

[Formatting Options](#)

[Import Options](#)

# XLSX Range Editor

Used for Microsoft Excel 2007 and newer files.



Select a Projetex database field from the left-hand list and click the corresponding column in the table to the left to assign that column to the field.

The **Auto-assign**  button will automatically assign columns to fields based on their order and **Cancel**  will clear all selections.

Use the **Skip Row(s)** field to exclude title rows from the import.

---

See also:

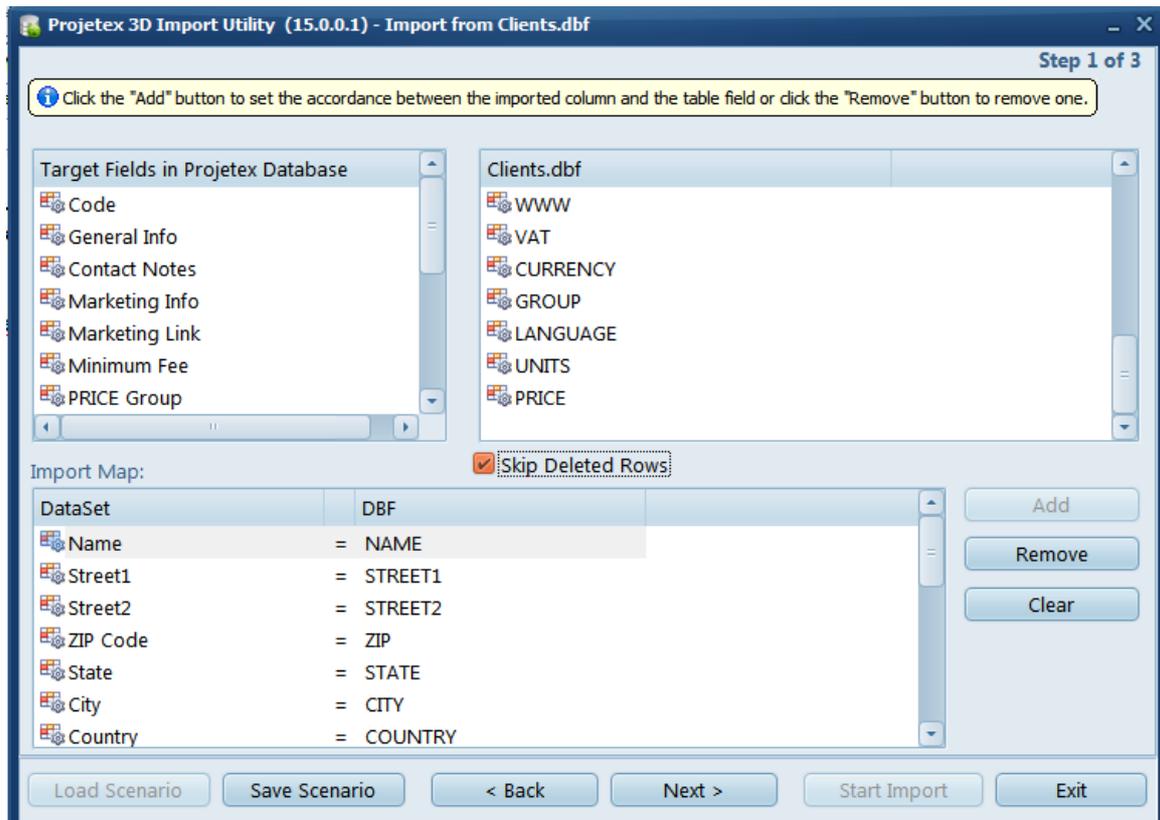
Selecting the mode and file

Formatting Options

Import Options

# DBF Range Editor

Used for dBase 3, dBase 4 and dBase 5 files.



Select the target and source fields in the top half off the screen and click **Add** to set up a link between them. Click **Remove** or **Clear** to cancel a particular link or all links, respectively.

One peculiar feature of dBase is that deleted records are not immediately removed from the database, instead they are just given the "deleted" status, emulating a "recycling bin" kind of functionality.

You can choose to either skip these rows or import them with the **Skip Deleted Rows** checkbox.

---

See also:

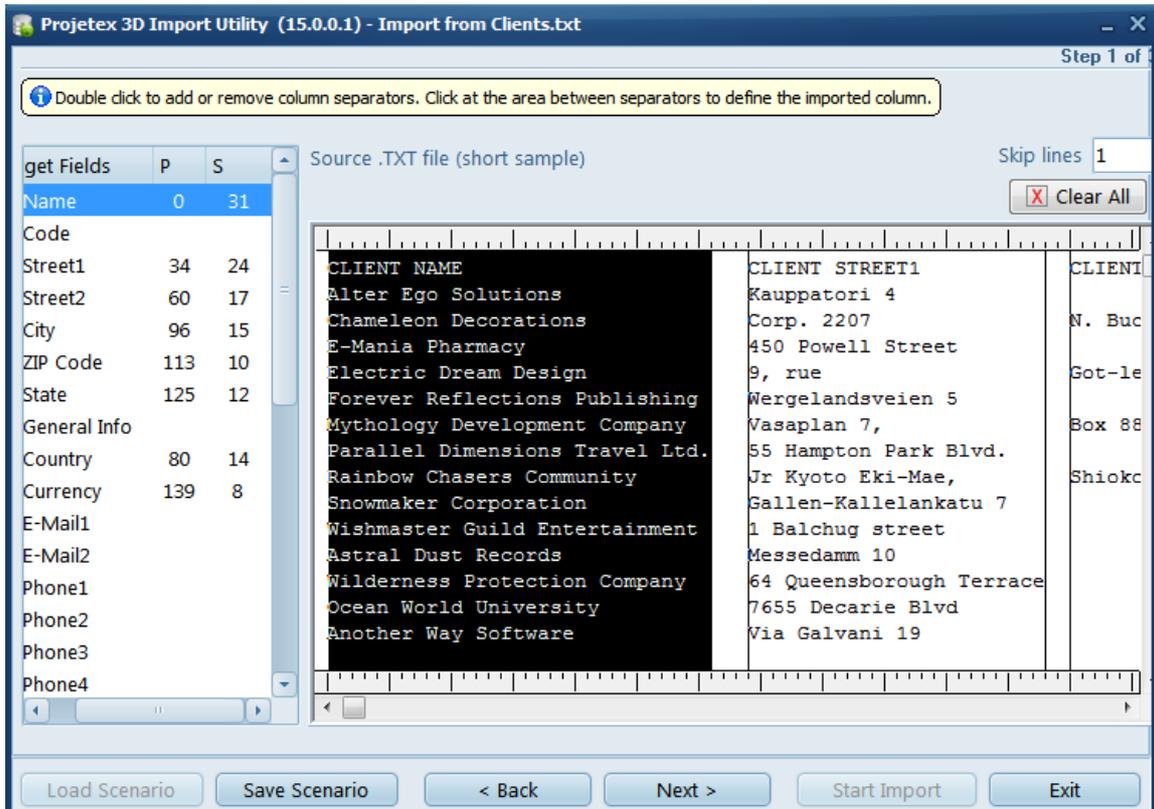
Selecting the mode and file

Formatting Options

Import Options

# TXT Range Editor

Used for whitespace-separated TXT databases.



**Important Note:** The spaces between the columns in the file must be filled with **whitespace** characters, not tab characters.

To import data from a TXT file, you must first define the columns by placing separator lines.

Double click to place and remove separators, click and drag to move them. The space between two separators should completely cover the longest entry in that column.

Once all separators are placed, select fields from the list to the right and click the required columns in the table. The import utility will record the starting point and width of the column for each field.

Use the **Skip Lines** field to skip title lines.

Clicking **Clear all** will remove the mapping between the columns and database fields, but not the separators.

See also:

Selecting the mode and file

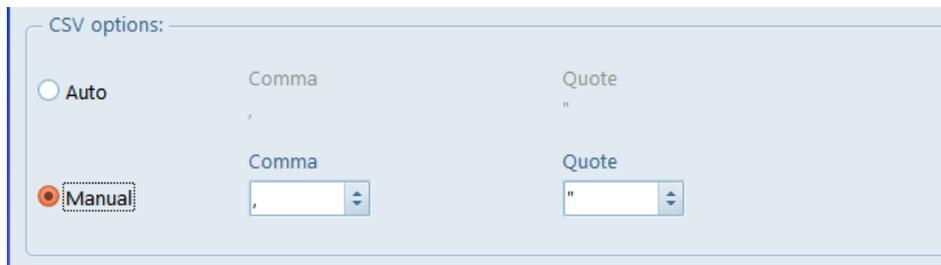
Formatting Options

Import Options

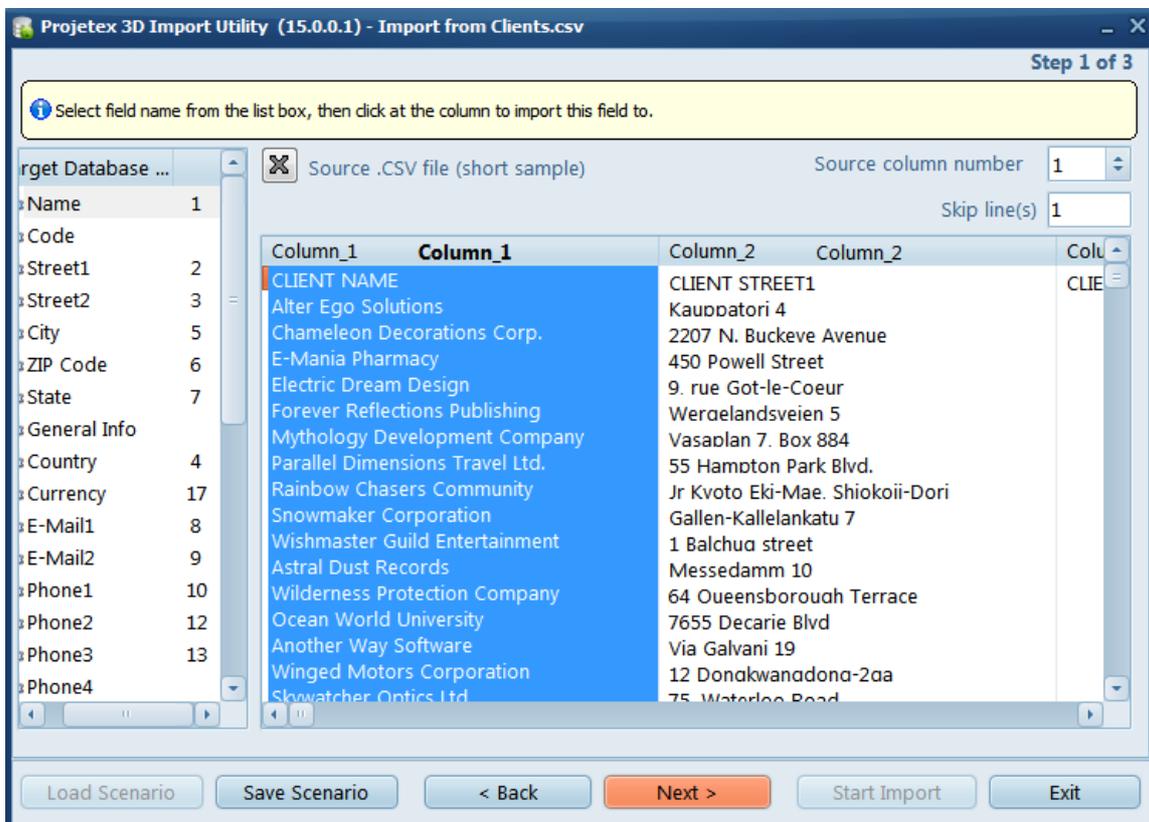
# CSV Range Editor

Used for Comma Separated Values files.

Before going to the range editor itself, you can adjust the "comma" and "quote" symbols that the utility will be looking for while reading the file, since some files can use symbols different from the standard.



The interface of the CSV Range Editor proper is quite similar to that of the XLSX range editor.



Select a database field and click a Column in the file display to link it to that field. Click the 'X' button to clear all links. Use the **Skip lines** field to exclude title lines.

See also:

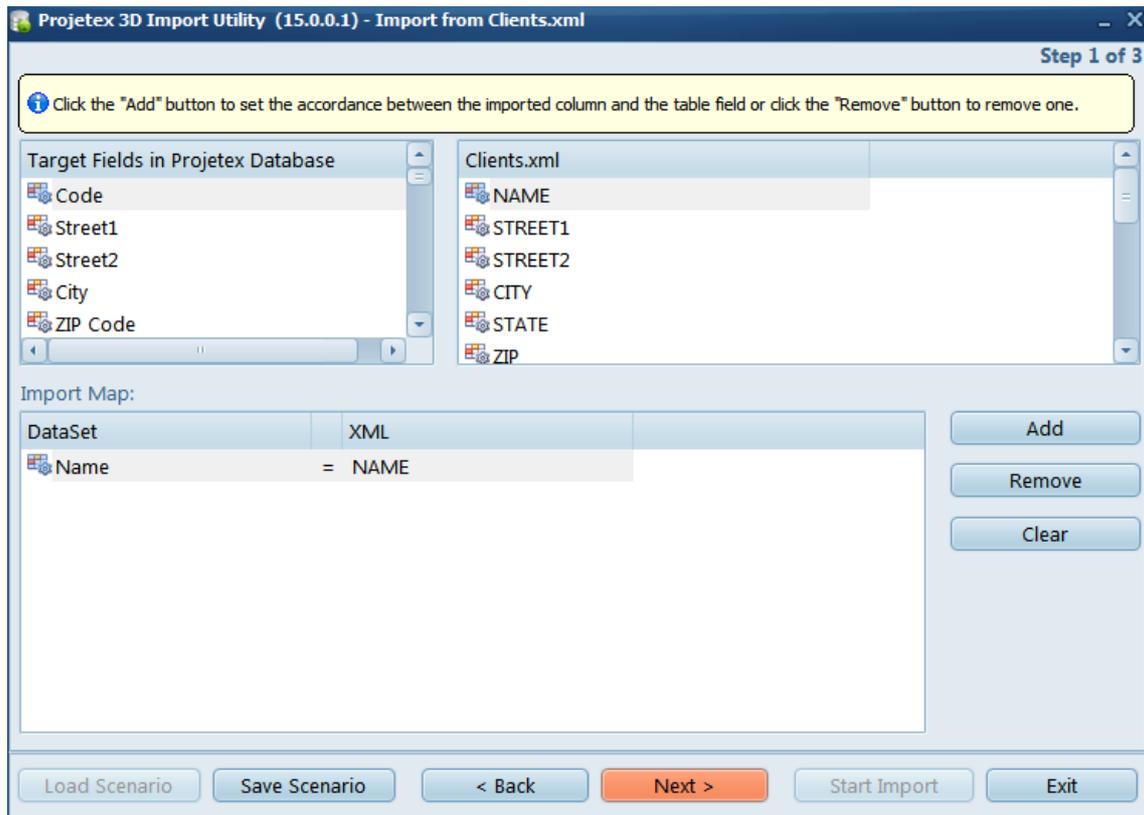
Selecting the mode and file

Formatting Options

Import Options

# XML Range Editor

Used for Data Packet V 2.0 files.



Select the target and source fields in the top half off the screen and click **Add** to set up a link between them. Click **Remove** or **Clear** to cancel a particular link or all links, respectively.

---

See also:

Selecting the mode and file

Formatting Options

Import Options

# Formatting Options

The next step after the Range editor involves setting the options for parsing some of the formatting in the source file. These options are separated between two tabs.

## Base Formats

Step 2 of 3

Base Formats | Data Formats

Date & Time Formats

Short date: dd.MM.yyyy

Long date: d MMMM yyyy 'y.'

Short time: h:mm

Long time: h:mm:ss

Separators

Decimal: .

Thousand: #160

Date: .

Time: :

Boolean True: True

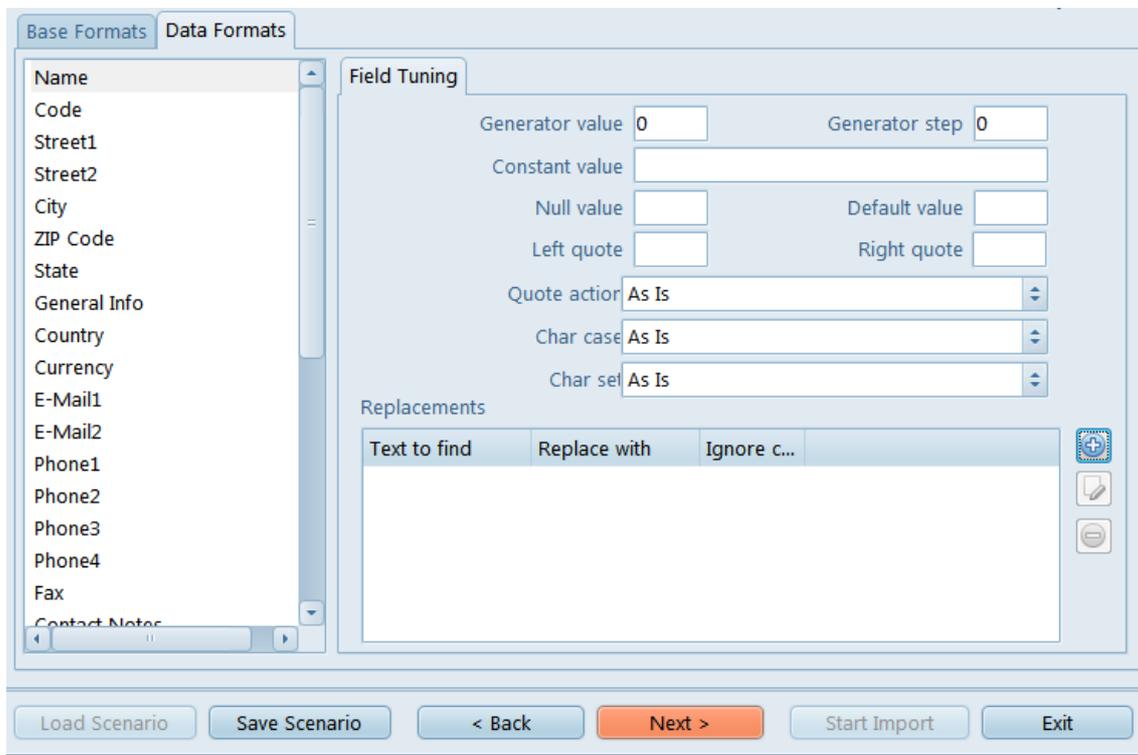
Boolean False: False

Null Values: Null

Load Scenario | Save Scenario | < Back | Next > | Start Import | Exit

Here you can tell the utility how the source file records dates and time, what separators are used for decimals, thousands (by default set to #160: non-breaking space), date and time, as well as enumerate the values used to represent the boolean states and the null state.

## Data Formats



On this tab you can customize the format of each imported field in case when additional formatting is required. Select the field in the 'Field Name' list and set its format in the proper edit fields. The available options are as follows:

**Generator Value** - use this edit field to set the initial value of the auto-increment field.

**Generator Step** - set the step of the auto-increment field. If it is 0 then the value of the generator will be ignored.

**Constant Value** - use this edit field to set the constant value of the field.

**Null Value** - set the value, which will be understood as NULL to set the default value.

**Default Value** - set the default value of the NULL field.

**Left quotation** - set a character or a number of characters, which denote quoting in the imported string.

**Right quotation** - set a character or a number of characters, which denote unquoting in the imported string.

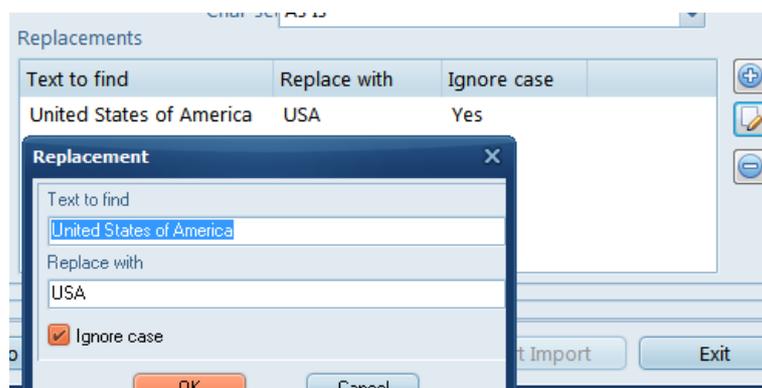
**Quotation action** - you can select 'Add' to add quotation marks to the imported string, 'Remove' to remove all the quotation marks from the imported string or 'As is' to save the original quotation marks.

**Char case** - set the case of the imported string. 'As is' saves the original string, 'Upper' sets the whole string to upper case, 'Lower' sets the whole string to lower case, 'UpperFirst' sets the first letter of the string to upper case, 'UpperFirstWord' sets the first letter of each word to upper case.

**Char set** - set the char set of the imported string to ANSI or OEM. 'As is' saves the original string char set.

## Replacements

Here you can set the replacement list for the selected field.



Every time the utility finds cell in that field, with a value matching one in the list, it will be automatically replaced. The **Ignore Case** option allows you to treat strings with different capitalizations as the same string and replace them all with a single alternative

string.

---

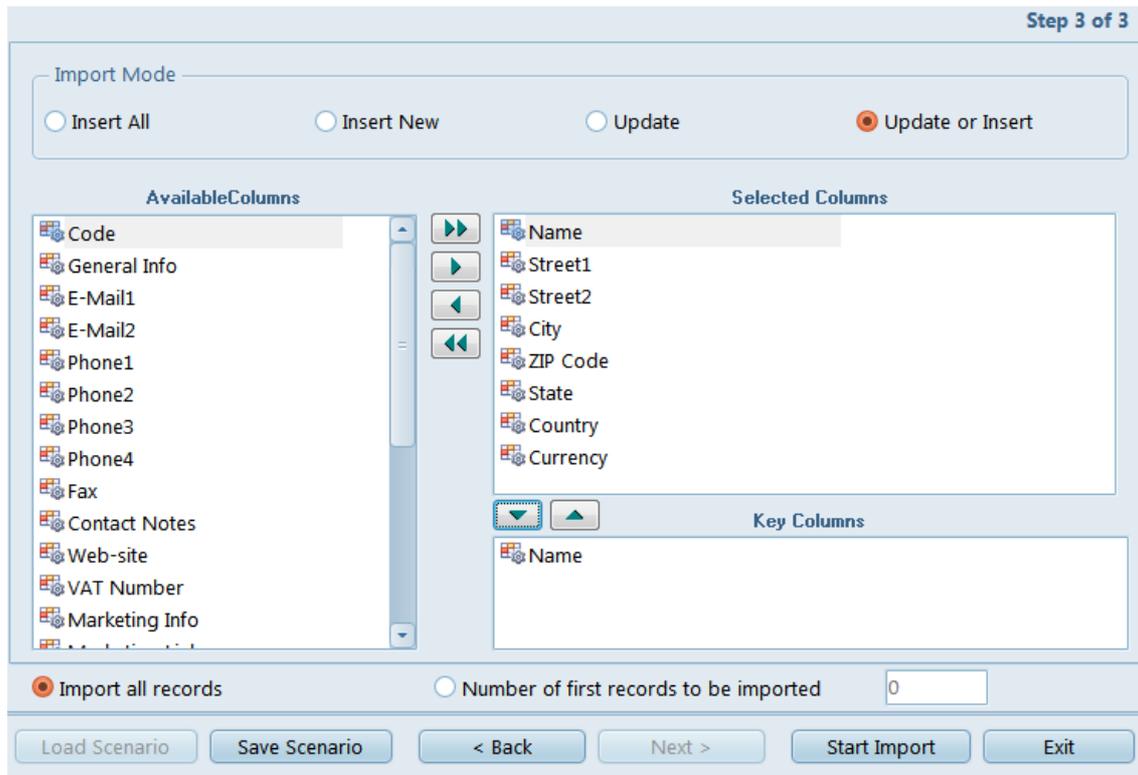
See also:

Selecting the mode and file

Import Options

# Import Options

Here you can select the import mode and set the extent of the import.



Four Import modes are available:

**Insert All** - Inserts all the records from the source file to the target object

**Insert New** - Inserts records which are not in the target object yet, others are skipped

**Update** - Updates those records which already exist in the target object, others are skipped

**Update or Insert** - Updates existing records and inserts new records

To choose which columns to import data into, select them in the "Available/Selected Columns" lists and use the four buttons between the lists to move the columns back and forth.

When using any Import mode other than **Insert All**, you will be required to designate one or more Key Columns. If a particular record's Key Column values match those of a record already in the database, the matching record will be updated. Otherwise, the data will be placed into a new record. Choose Key columns by using the "up/down" buttons next to the "Selected Columns" list.

At the bottom of the window you can choose whether you want to import all the records in the file or only a certain number (starting from the top).

Once you are satisfied with the settings, click **Start Import**.

**NOTE:** If you want to save an import scenario for later use, it is recommended to do so at this step, immediately before or immediately after performing the actual import.

---

See also:

Selecting the mode and file

Formatting Options

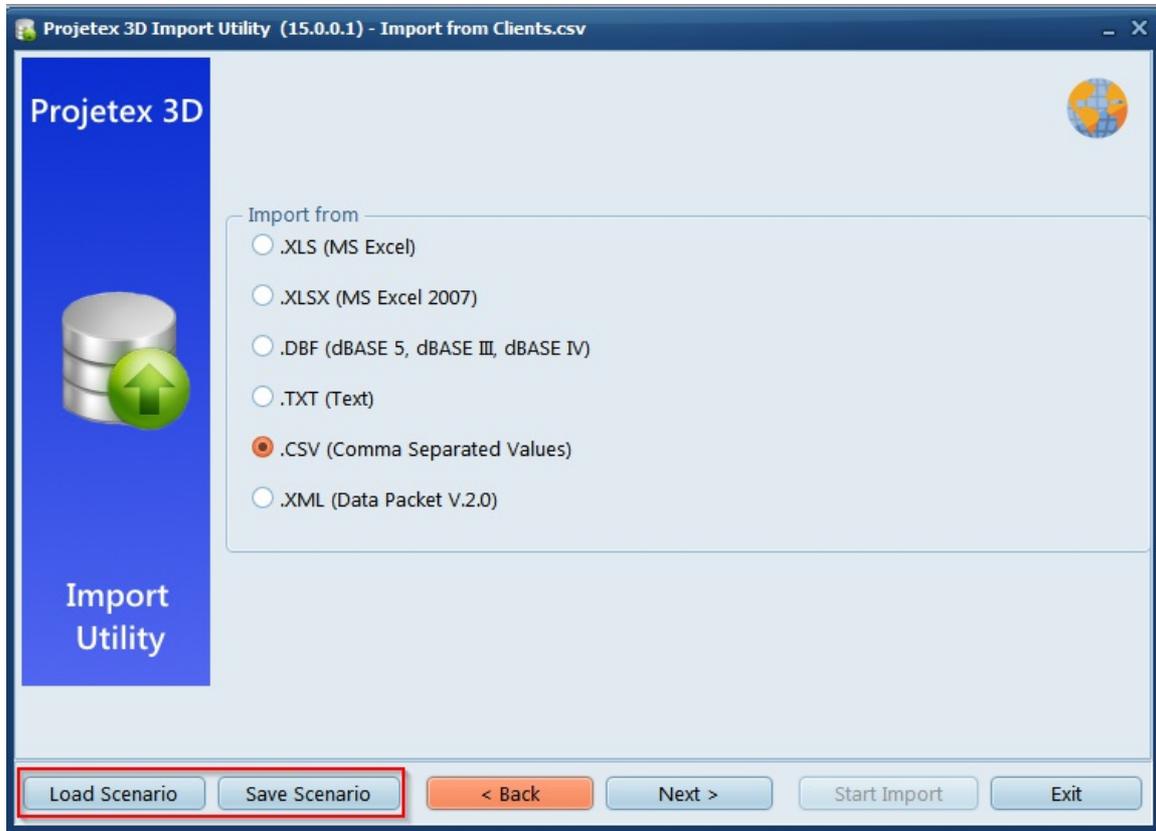
Import Scenarios

# Import Scenarios

Import scenarios are special files that store the configuration of import sessions.

They are very useful for those who regularly import files from the same source, as using them allow to avoid having the configure the import session by hand.

To manage import scenarios, use the **Save Scenario** and **Load Scenario** buttons in the bottom-left corner of the window.



A scenario can be saved at any point during the configuration process, but it is recommended to save scenarios immediately before or immediately after performing the actual import.

A scenario can be loaded only during the "select format" step.

---

See also:

Selecting the mode and file

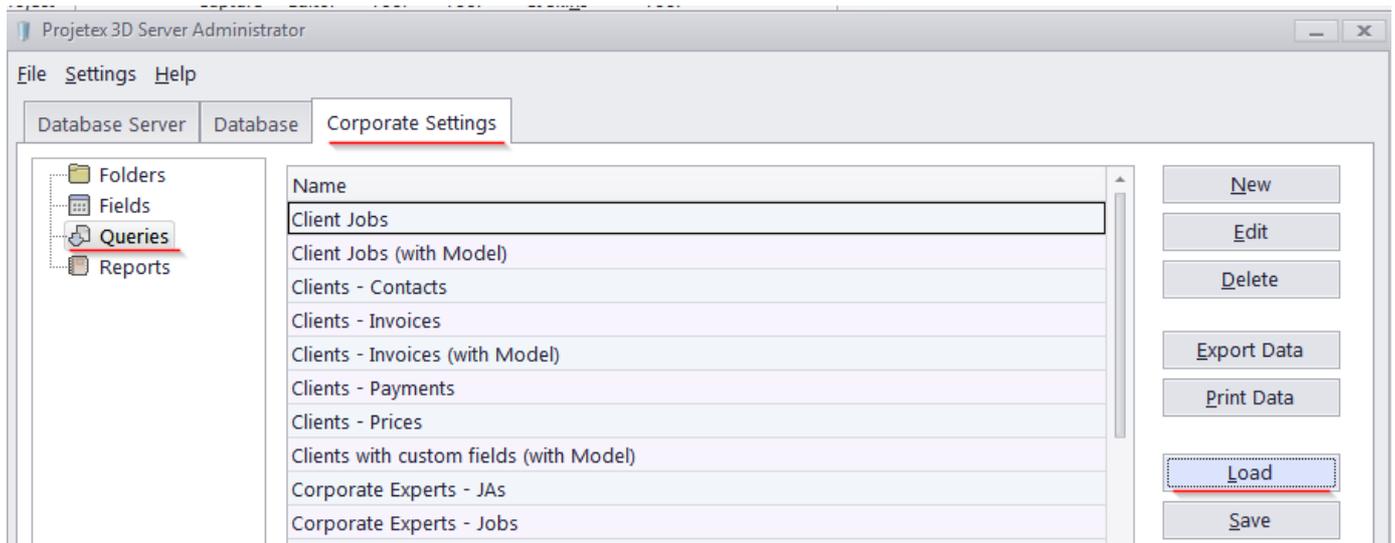
# Importing Custom Queries

You can import custom queries into your database from *pxq* files.

**Note:** Custom queries which are displayed in the **Queries** section of the Projetex Server Administrator are the ones currently integrated into the Projetex database. *PXQ* files are used solely for export-import purposes, simply copying a new *PXQ* file into `\AIT\Projetex 3D\Projetex Server\Queries\` will not import the new query to the database.

To import a custom query, do the following.

1. Save *PXQ* file being imported into the `\AIT\Projetex 3D\Projetex Server\Queries\` folder.
2. In the **Queries** section of the **Server Administrator**, click the **Load** button.
3. Locate *PXQ* file to be imported, select it and click the **Open** button.



See also:

[Query settings](#)

[Custom Queries](#)

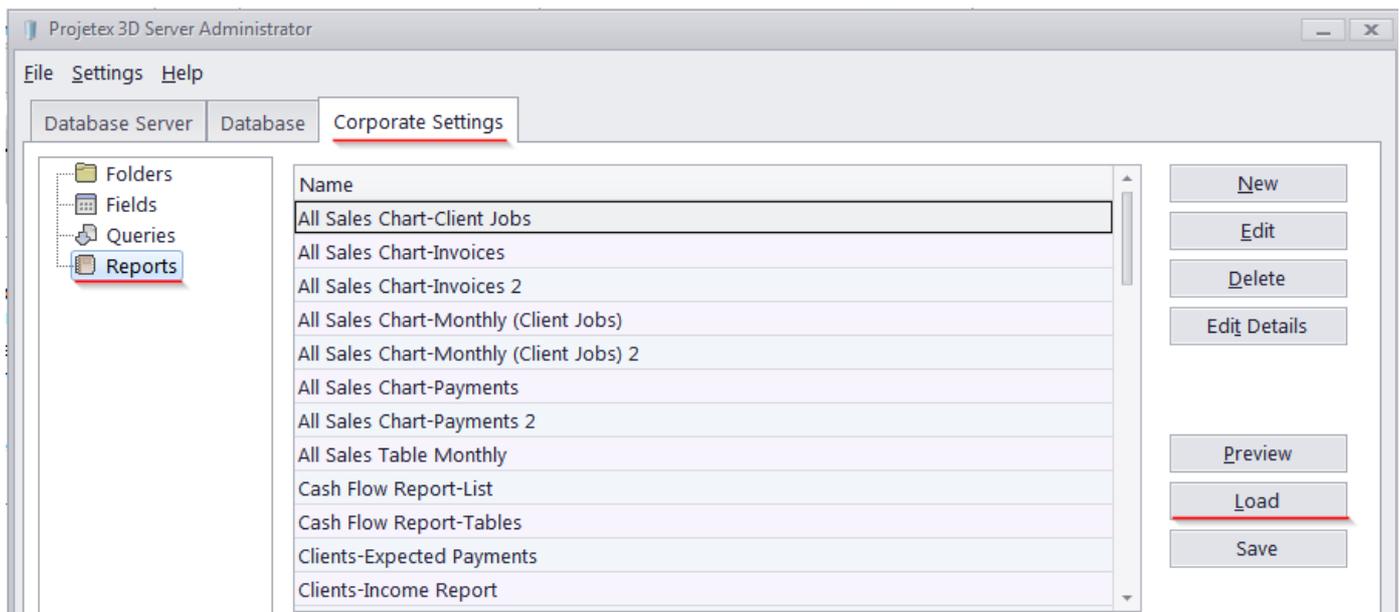
# Importing Custom Reports

You can import custom reports into your database from *PX15* files.

**Note:** Custom reports which are displayed in the **Custom Reports** section of the Projetex Server Administrator are the ones currently integrated into the Projetex database. *PX15* files are used solely for export-import purposes, simply copying a new *PX15* file into `\AIT\Projetex 3D\Projetex Server\Reports\` will not import the new report into the database.

To import a custom report, do the following:

1. Save *PX15* file being imported to `\AIT\Projetex 3D\Projetex Server\Reports\` folder.
2. In the **Reports** section of the **Server Administrator**, click the **Load** button.
3. Locate the *PX15* file to be imported, select it and click the **Open** button.



See also:

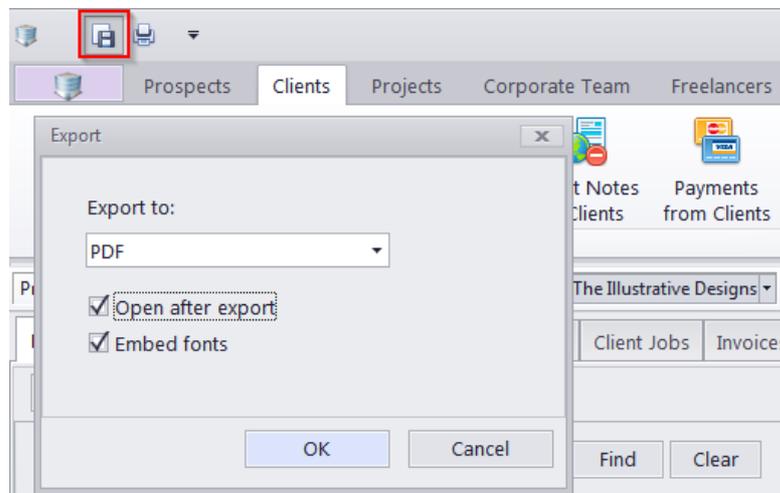
[Report Settings](#)

[Managing custom reports](#)

# Exporting from Projetex Workstation

To export any table from the Projetex Workstation:

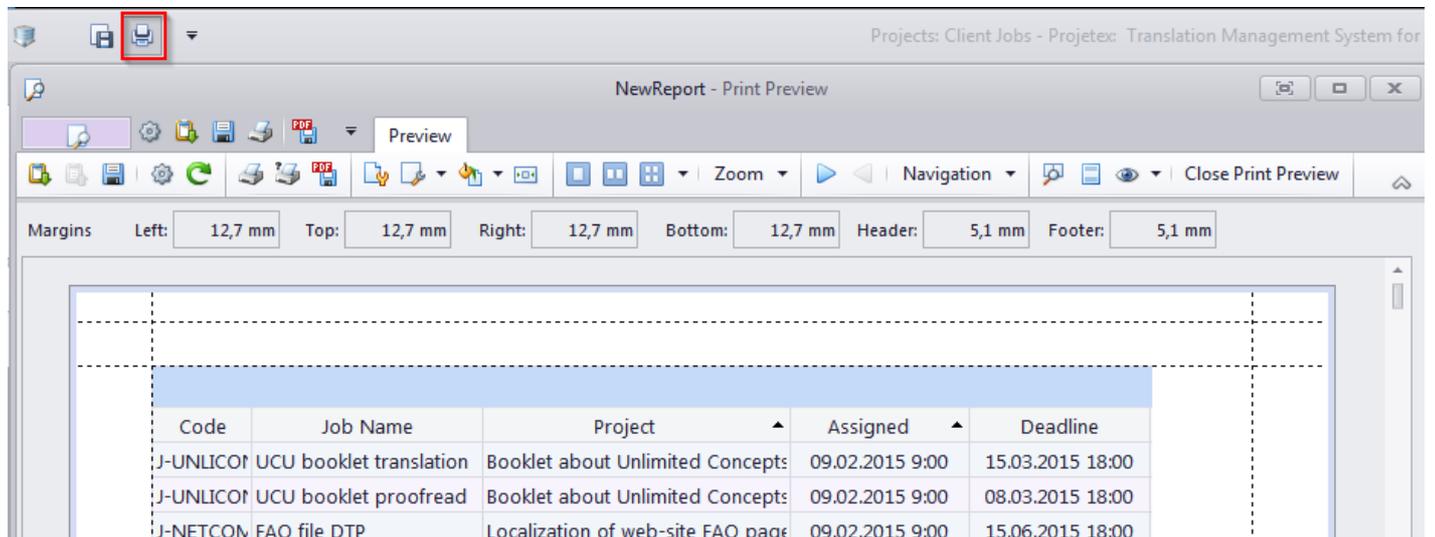
1. Open this table and apply filters until it displays the required data.
2. Click the **Export** button near the top-left corner of the Projetex Workstation window.



3. Select the export format and any additional options, and click the **OK** button.

Alternatively, you can export the table directly to the printer: Click the **Print** button next to the Export button.

This will open the **Print Preview** window and allow you to adjust the appearance of the table (e.g. alter the margins, page parameters, etc.) before printing it.



You can disable the *export and print options* for a user in the **Users and Access** section of the **Administrator** settings.

1. Go into the **Backstage** view and switch to the **Administrator** tab.
2. Click the **Users and Access** section, select the required user in the list and click the **Edit** button.
3. In the **Edit User** window select or clear the **Local Report>>Export** and **Local Report>>Print** options to enable or disable access to corresponding functions.

See also:

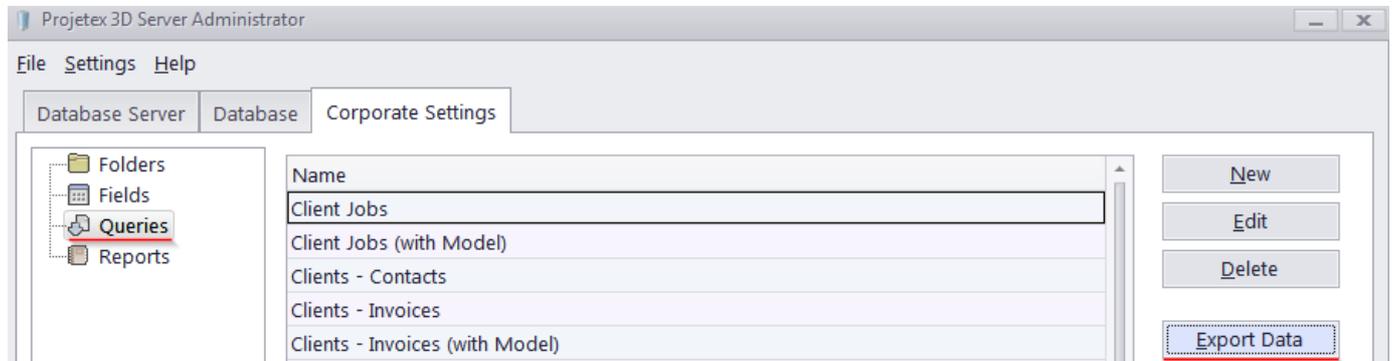
Local Export

# Exporting from Projetex Server

Any data stored in the Projetex Server can be exported directly the from database using custom queries.

To export data directly from database:

1. Run the Projetex Server Administrator and click the **Go Offline** button in the **Database** tab.
2. Go to **Corporate Settings** > **Queries** and select the required query.
3. Click the **Export Data** button, select the export format and click **OK**.



See also:

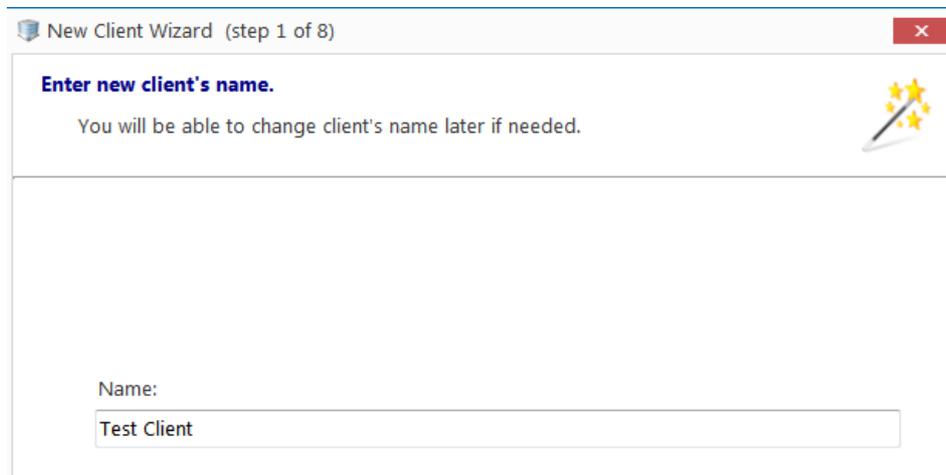
Query settings

Custom Queries

# Client Wizard

The New Client Wizard guides you through the user creation process in 8 steps. After entering the required information

1. Enter the Client's name.



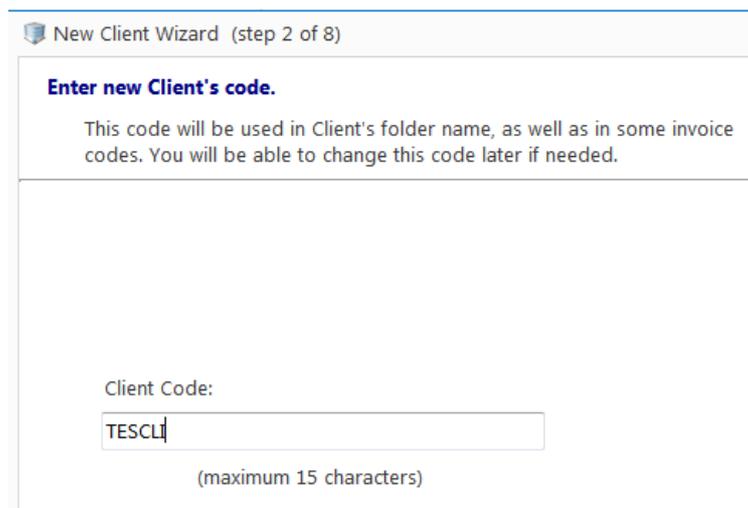
New Client Wizard (step 1 of 8)

**Enter new client's name.**

You will be able to change client's name later if needed.

Name:

2. The client's code is generated from the name. You can confirm or Edit it.



New Client Wizard (step 2 of 8)

**Enter new Client's code.**

This code will be used in Client's folder name, as well as in some invoice codes. You will be able to change this code later if needed.

Client Code:

(maximum 15 characters)

3. Enter the client's Postal address data (street address, city, country, zip code). This and all subsequent steps are optional and can be skipped.
4. Enter the contact details (e-mails, phones, fax, Web-site).
5. Adjust the financial details (client's currency, VAT number, payment and invoicing terms)

### Enter new Client's financial details.

(optional)



Currency: EUR

Payment Terms: From Invoice Date

Within 30 days

On day 10 of the same month

On day 10 of the next month

On day 10 of the month following next

Unknown/Other

Vat Number: (maximum 20 characters)

Invoicing policy: Invoice Client Jobs

Immediately after completing job

Only after total of invoiced jobs reaches 0,00

Wait accrual no longer than 0 days

Back Next Cancel

6. Confirm or adjust the client's locale settings.

### Clients local settings

You can specify client's local settings if they are different than your own. These settings will be used in document templates.



Generation of RTF files: Custom Values

Default Locale

Custom Values

Negative Currency Format: -1,1

Decimal Symbol: ,

No. of digits after Decimal: 2

Digit Grouping Symbol:

Date Separator: .

Short Date Format: dd/MM/yyyy

Long Date Format: d MMMM yyyy' p.'

**Samples:**

Positive Number: 123 456 789,00

Negative Number: -123 456 789,00

Short Date: 06.06.2018

Long Date: 6 червня 2018 р.

7. Enter any General information about the client.

8. Enter data into the client's custom fields (if any). Click **Finish** to create the new client.

See also:  
Wizards

# Product Line Wizard

This Wizard allows you to quickly add new Product Lines to existing clients. The process consists of two steps:

1. Select the client for which you want to create a product line.

New Product Line Wizard (step 1 of 2)

**Select a client.**

Select a client to whom the new Product Line must be added.

Enter text to search... Find Clear

Client

- Digital First Concierge
- Digital Network Entertainment
- Future Unified Resources
- Global Concepts Universal
- Global Interactive Resources
- Intelligent Interworks
- Internet Unified Corp.
- Key Outsourcing Studios
- Massive Archway, Inc
- Network Community Technologies
- The Lightning Graphics
- Translation Designs

1 of 14

New Client Wizard

Back Next Cancel

You can open the New Client Wizard from this window as well.

2. Enter the name of the new product line, select the Client PM and one or more Managers for it.

New Product Line Wizard (step 2 of 2) ✕

**Enter New Product Line data.** 

Specify new Product Line details.

Client: **Key Outsourcing Studios**

Product Line name:

Client PM:

Managers:

Assigned Staff		Available Staff
Micky Holland	<< Assign	Bartholomeo Rodriques
	Remove >>	Fernando Lucena
		John Brown
		William McSun

---

See also:  
Wizards

# Contact Wizard

This wizard can quickly add new contact person records to Clients. The process has 2 steps:

1. Select the client for which you want to create a new contact person record.

New Contact Wizard (step 1 of 2)

**Select a client.**

New contact will be added to the Client which you select.

Enter text to search... Find Clear

Client

- Digital First Concierge
- Digital Network Entertainment
- Future Unified Resources
- Global Concepts Universal
- Global Interactive Resources
- Intelligent Interworks**
- Internet Unified Corp.
- Key Outsourcing Studios
- Massive Archway, Inc
- Network Community Technologies
- The Lightning Graphics
- Translation Designs

8 of 14

New Client Wizard

Back Next Cancel

You can open the New Client Wizard from this window as well.

2. Enter the personal and contact data of the contact. You can also add a photo.

New Contact Wizard (step 2 of 2) ✕

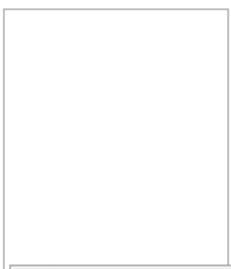
**Enter contact information** 

Enter contact information and photo of your new contact. Name field cannot be empty.

---

Client: **Intelligent Interworks**

---



Salutation:

Name:

Title:

E-Mail:

E-Mail 2:

Phone:

Phone 2:

Phone 3:

Phone 4:

Fax:

Notes:

-  Copy
-  **Paste**
-  Delete

---

-  Load...
-  Assign From Camera...
-  Save As...

Back Finish Cancel

---

See also:  
Wizards

# Service Wizard

This wizard can quickly create new services and add their base prices to the price lists. the process consists of 3 steps:

1. Create a new Service group or select an existing group.

New Service Wizard (step 1 of 3)

**Select group for this service**  
Enter or select a group for this service.

New Group of Services

Group Name:

Existing Groups of Services

- Consulting
- DTP Tasks
- Editing
- Other
- Testing
- Translation

Back Next Cancel

2. Enter the name of the new service. Check against the list of existing services to avoid duplicates.

New Service Wizard (step 2 of 3)

**Enter service name**

It is possible that group-service combination which you wish to enter already exists in Projetex database. Use Existing Services list to check if this is so.

Service Group: **Consulting**

New service:

Existing services:

**Cultural Assessment**  
**Multilingual Copywriting**

Back Next Cancel

3. Set the General price of the service for the Client and Freelancer lists, selecting the currency, unit, and per-unit price for each.

New Service Wizard (step 3 of 3)

**Enter service data**

You can add price list (client and freelance) for the selected service.

Service Group: **Consulting**

New service: **test**

Add general price record for Clients

Units: words  
Price: 0,00 (per unit)  
Currency: EUR

Add general price record for Freelancers

Units: words  
Price: 0,00 (per unit)  
Currency: EUR

Back Finish Cancel

See also:  
Wizards

# Quote Wizard

This wizard can quickly create new quotes. The process has 3 steps:

1. Select the client for which you want to create a new quote.

New Quote Wizard (step 1 of 3)

**Select a client.**  
Select a client to whom this Quote will be sent.

Enter text to search... Find Clear

Client

- Cyber Computation Technologies, Inc
- Definition Designs
- Digital First Concierge
- Digital Network Entertainment
- Enigma Server Technologies, Inc
- Future Unified Resources
- Global Concepts Universal
- Global Interactive Resources
- Intelligent Interworks
- Internet Security Technologies
- Internet Unified Corp.

1 of 21

New Client Wizard

Back Next Cancel

You can open the New Client Wizard from this window as well.

2. Enter the basic quote data (name, client PM, and timeline)

New Quote Wizard (step 2 of 3)

**Enter draft project data**  
Select Client's contact person for this draft Project (Client PM), enter name of the Project and specify draft timeline.

Client: Cyber Computation Technologies, Inc

Client PM: - Not Selected -

Draft Project:

Draft Timeline:

Assigned: 06/06/2018 16:37 (when)

Deadline: 06/06/2018 18:00 (when)

=Assigned

Back Next Cancel

3. Create the quote's Draft Jobs (see New/Edit Draft Client/Prospect Job Window for details). Select the Discounts, markups and taxes, if any.

New Quote Wizard (step 3 of 3)

**Add draft job(s)**  
Add draft client jobs and quote their volumes and prices.

New Edit Delete

Name	Group of Ser	Service	Unit	Volume	Price	Pricing	Total
				0	0,00	per unit 0,00	

1 of 1

Discount/Markup: - None - (0,00%) 0,00 Tax: - None - (0,00%) 0,00

Discount/Markup 2: - None - (0,00%) 0,00 Tax 2: - None - (0,00%) 0,00

Net Jobs Total: 0,00 Quote Total: 0,00

Back Finish Cancel

New Draft Client Job

Details Count Notes Audit

Name:

Group: -None-

Service: -None-

Volume: 0 -None- AnyCount CATCount

Price: 0,00 per unit Prices

Total: 0,00  
Currency: EUR

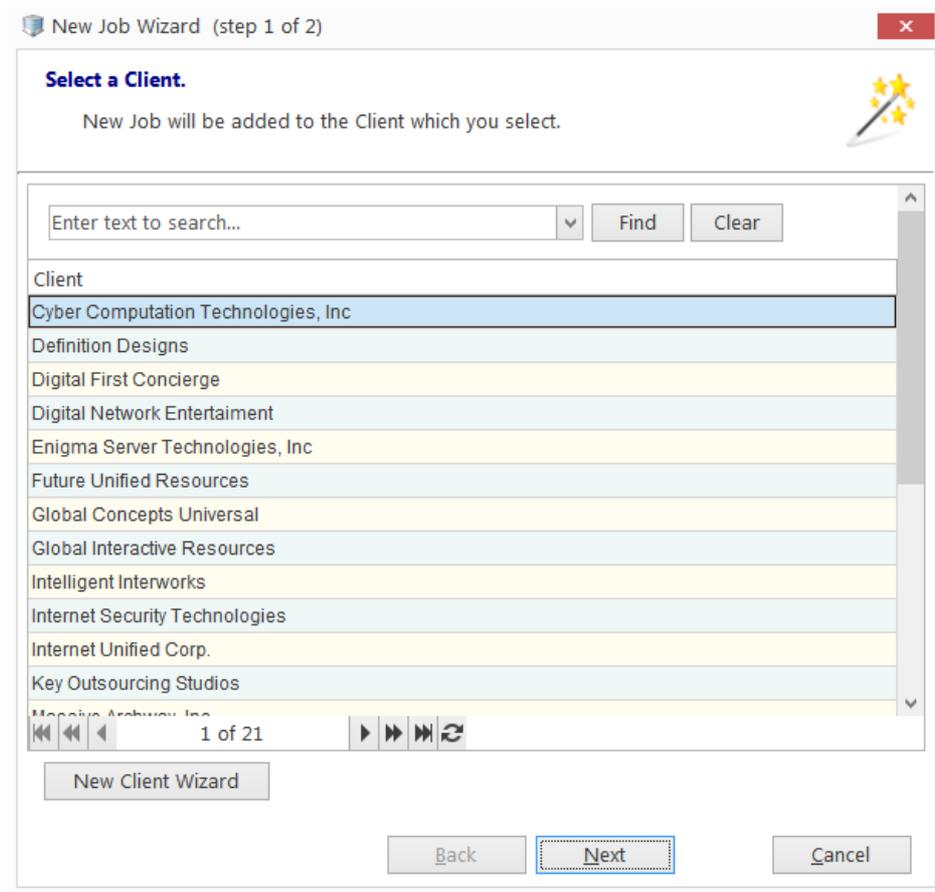
OK Cancel

See also:  
Wizards

# Job Wizard

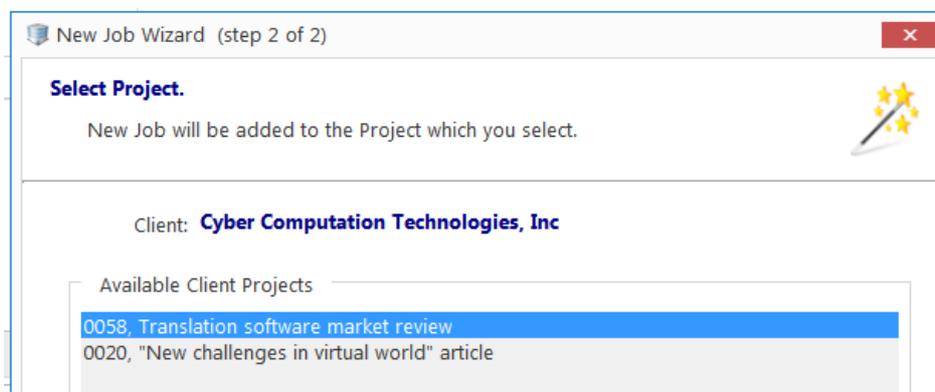
This wizard can quickly create new Client Jobs. The process has 2 steps:

1. Select the client for which you want to create a new Job.



You can open the New Client Wizard from this window as well.

2. Select one of the client's existing projects.



Once you click **Finish**, the New Client Job window will open and you will be able to enter the other details of the job.

---

See also:  
Wizards

# Invoice Wizard

This wizard can quickly create new Invoices. The process has 2 steps:

1. Select the client for which you want to create a new Invoice.

New Invoice Wizard (step 1 of 2)

**Select a client.**

Select a client to whom this invoice will be sent.

Enter text to search... Find Clear

Client

- Cyber Computation Technologies, Inc
- Definition Designs
- Digital First Concierge
- Digital Network Entertainment
- Enigma Server Technologies, Inc
- Future Unified Resources
- Global Concepts Universal
- Global Interactive Resources
- Intelligent Interworks
- Internet Security Technologies
- Internet Unified Corp.

6 of 20

New Client Wizard

Back Next Cancel

You can open the New Client Wizard from this window as well.

2. Select whether you want to add uninvoiced Jobs from all of the Client's projects, or from a specific project.

New Invoice Wizard (step 2 of 2)

**Select Projects.**

You can limit the scope of client jobs to those contained within certain project.

Client: **Digital First Concierge**

Invoice Client Jobs from different Projects

Invoice Client Jobs from certain Project

- 0026, Localization of H-210 instruction
- 0021, HIGHTECHPRO H-210 smartphone specification

Once you click **Finish**, the New Invoice Window will open, with all uninvoiced jobs added, and you will be able to enter the other details of the Invoice.

---

See also:  
Wizards

# PO Wizard

This wizard can quickly create new Purchase Orders. The process has 2 steps:

1. Select the Freelancer for which you want to create a new PO.

New PO Wizard (step 1 of 2)

**Select a Freelancer.**

Select a freelance expert to whom this purchase order(PO) will be sent.

Enter text to search... Find Clear

Freelancer name

Ernest Fredrickson

Hilda Herald

Jose Fernandez

Kirsi Nurmi

Koen Haanrath

Melissa Beaumont

Navid Shahriar Javaid

Pamela Lafontaine

Peter Pendleton

Takumi Mizushima

Theresa Suarez

Thomas Geelen

Vesa Kopitello

1 of 13

Back Next Cancel

2. Select one project, with Freelancer Jobs assigned to the selected freelancer.

New PO Wizard (step 2 of 2)

**Select Project.**

Select a project which freelance jobs you wish to add to purchase order (PO).

Freelancer: Ernest Fredrickson

New PO will contain freelance jobs from selected project

0050, Proofread www.enigmaservertech.com

0025, LS Drive - 1305m

Back Next Cancel

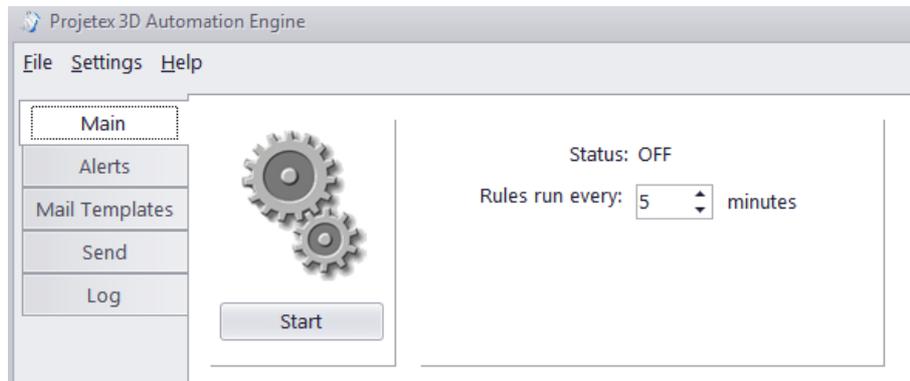
Once you click **Finish**, the New PO Window will open, with all jobs that are assigned to the selected freelancer, but not yet sent in a previous Po, added. Then you will be able to enter the other details of the Invoice.

---

See also:  
Wizards

# Projetex Automation Engine

The Projetex 3D Automation Engine is a server-level utility that automatically sends out internal Projetex alerts and E-mail notifications to project managers, clients, and experts, informing them of alert statuses of jobs, projects, and other documentation.



The automation engine's interface consists of several tabs:

- The **Main** tab allows you to start and stop the engine, as well set the interval between checking for alert statuses.
- In the **Alerts** tab you set up the actual alert checks and their recipients.
- The **Mail Templates** tab contains all the engines e-mail templates and allows you to quickly edit them.
- The **Send** tab contains the connection settings for the SMTP server, the From line of the generated e-mails, and a Test Connection feature.
- The **Log** tab records every alert sent by the engine.

In addition to being sent as an e-mail, each alert will also be visible in the Alerts tab of the record that triggered it.

---

See also:

Alerts Tab

Mail Templates Tab

Send Tab

# Alerts Tab

The **Alerts** tab of the automation engine displays all alerts running on it.

Alerts are displayed as a table, showing the alert's type, subtype, and whether it is currently active.

Use the **New/Edit/Delete** buttons to manage the alerts.

The screenshot shows the 'Alerts' tab interface. On the left is a sidebar with buttons for 'Main', 'Alerts' (highlighted), 'Mail Templates', 'Send', and 'Log'. The main area displays 'Configured Mail Alerts:' as a table:

Alert type	Alert subtype	Active
Client Quotes	Accepted	✓

Below the table is an 'Edit Alert' dialog box. It has a title bar with '?' and 'X' buttons. The dialog contains the following fields and controls:

- Active
- Alert type: Client Quotes (dropdown)
- Alert Subtype: Accepted (dropdown)
- Default notification recipients:  Project Manager,  Client
- Notification recipients by subscription: A table with columns 'Subscribers name' and 'Subscribers email'. One entry is visible: William McSun, wms@translation3000.com.
- Buttons: + Add, - Remove, OK, Cancel.

At the bottom of the main interface are three buttons: + New, Edit (highlighted with a red underline), and - Delete.

## Adding/editing alerts

When adding or editing alerts, you can set the following parameters:

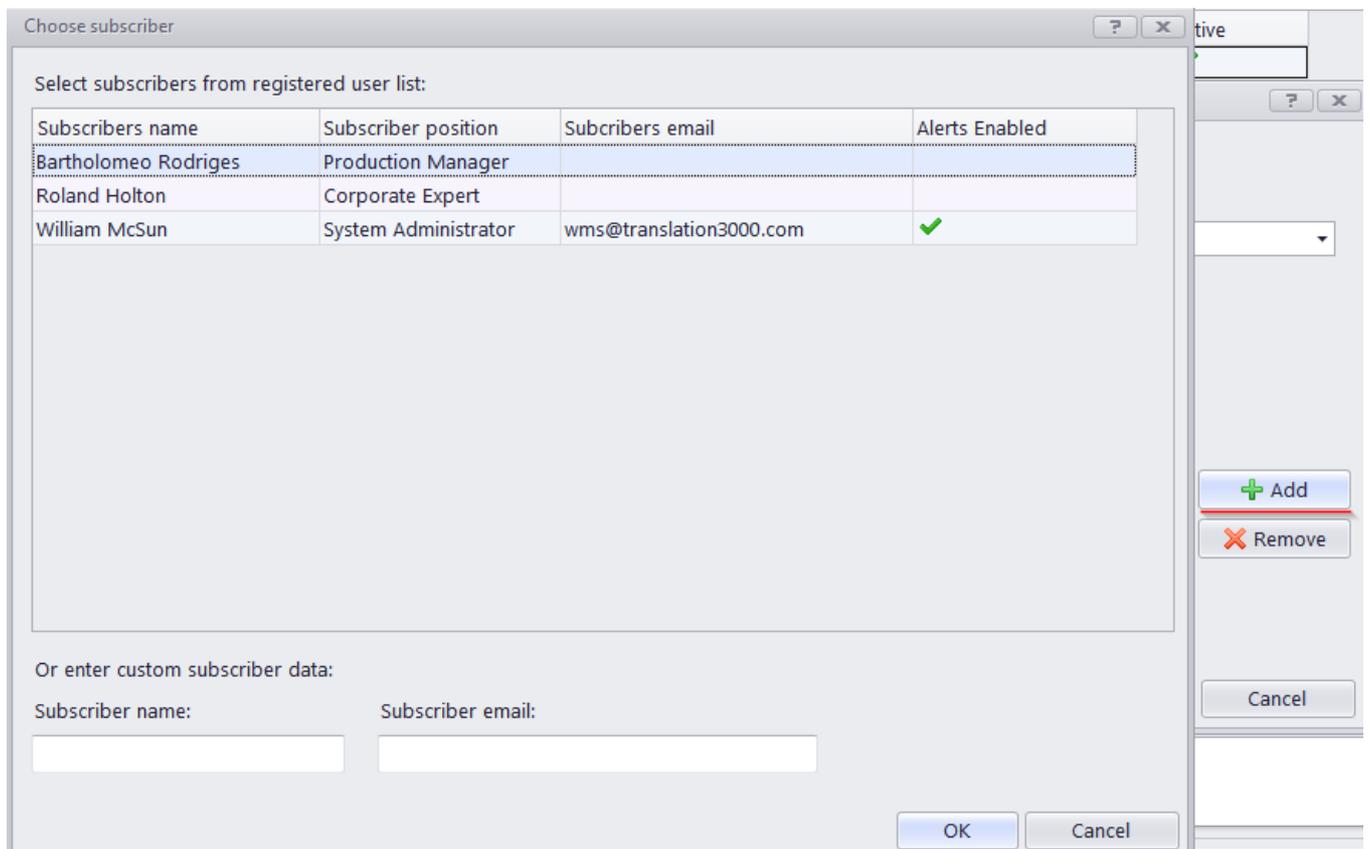
**Active** - check to engage engine monitoring on this alert.

**Alert Type** - the database record type, which the alert monitors.

**Alert Subtype** - the status of the record type, which triggers the alert.

**Default notification recipients** - the persons to receive the notification. The choices available depend on the alert type and subtype.

**Notification Recipients by Subscription** - additional persons to receive the alerts. Click **Add** to select new ones from the user list or enter their name and e-mail directly.



---

See also:

Projetex Automation Engine

Mail Templates Tab

Send Tab

# Mail Templates Tab

The **Mail Templates** tab contains the notification templates.

Every alert type/recipient combination has a unique template.

Each tab represents an alert type. Recipient types can be selected via a drop-down menu.

You can edit the templates directly in their tabs. Right-click to bring up a list of Automation Engine variables and select one to insert it into the text.

Click **Restore Default Template** to undo all changes made to the template.

The screenshot displays the 'Mail Templates' tab for a 'Project Manager' recipient type. The interface includes a sidebar with 'Main', 'Alerts', 'Mail Templates', 'Send', and 'Log'. The main area shows a template titled 'Template "Invoices" for "Project Manager"'. It features tabs for 'Projects', 'Clients', 'Client Quotes', 'Client Jobs', 'Corporate Jobs', 'Freelance Jobs', 'Invoices', and 'POs'. A 'Select recipient type:' dropdown is set to 'Project Manager'. The 'Message Subject' field contains '[Projetex] #ALERTSTATUS as of #NOWDATE, #NOWTIME'. The 'Message Text' field contains: 'Dear #TONAME, Please be advised that the following Invoices for Client Jobs un #ITEMLIST #FROMNAME #FROMORG #FROMMAIL #NOWDATE #NOWTIME This is an automatic notification, please do not reply. Created by Projetex E-mail Alerter automated service'. A context menu is open over the text, listing variables: '#TONAME (Recipient's Full Name)', '#TOMAIL (Recipient's E-Mail Address)', '#ALERTSTATUS (Alert Status)', '#ITEMLIST (Project/Job/Invoice/PO List)', '#FROMNAME (Sender's Full Name)', '#FROMMAIL (Sender's E-Mail Address)', '#FROMORG (Sender's Organization)', '#NOWDATE (Current Date)', and '#NOWTIME (Current Time)'. A 'Restore Default Template' button is located at the bottom right. A note at the bottom left states: 'Note: Right-click anywhere in the message text to insert variables'.

See also:

Projetex Automation Engine

Alerts Tab

Send Tab

# Send Tab

The Send tab contains the settings of the Automation engine's e-mail connection.

The screenshot shows the 'Send' tab in a software interface. On the left is a vertical navigation menu with buttons for 'Main', 'Alerts', 'Mail Templates', 'Send' (which is highlighted), and 'Log'. The main content area is divided into several sections:

- Allow checking database and sending of e-mail notifications:** A checkbox that is currently unchecked.
- SMTP Server:** A section containing:
  - 'Server': An empty text input field.
  - 'Connection': A dropdown menu with 'Regular' selected.
  - 'Port': A text input field containing '25'.
  - 'Use Authentication': An unchecked checkbox.
  - 'User Name': An empty text input field.
  - 'Password': An empty text input field.
- From:** A section containing:
  - 'Name': A text input field containing 'Projetex 3D Notification Service'.
  - 'Email Address': An empty text input field.
  - 'Organization': An empty text input field.
- Message:** A section containing:
  - 'Priority': A dropdown menu with 'Normal' selected.
  - 'Connection Test': A button.

Here you can enable or disable the e-mail notification functionality, as well as enter the Address, connection type (regular, TLS or STARTTLS) and the access credentials (if needed) for your SMTP server.

You can also specify the default 'From' line of the e-mail notifications by entering the sender name, e-mail and company name.

Select the default priority of the notifications and click **Connection Test** to check if the connection parameters were entered correctly.

---

See also:

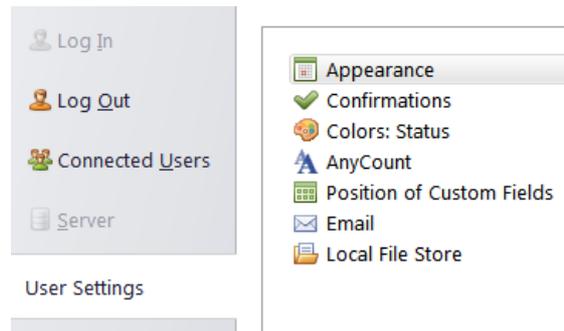
Projetex Automation Engine

Alerts Tab

Mail Templates Tab

# User settings

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



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

- **Appearance** — set up the general appearance of the program.
- **Confirmations** — set the consistency checks in project and job timelines.
- **Colors: Status** — status colors settings for quotes, projects, jobs and invoices.
- **AnyCount** — settings of built-in AnyCount 3D engine for counting various file types.
- **Position of Custom Fields** — customization of custom fields's position.
- **Email** — the settings for the program's Email connection.
- **Local file store** — set the location on the folder containing the local copies of all work files.

---

See also:

Corporate settings

Administrator settings

# Appearance

Here you can customize the general appearance of the Projetex Workstation.

**Skins** - choose between several skins for Projetex.

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

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

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

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

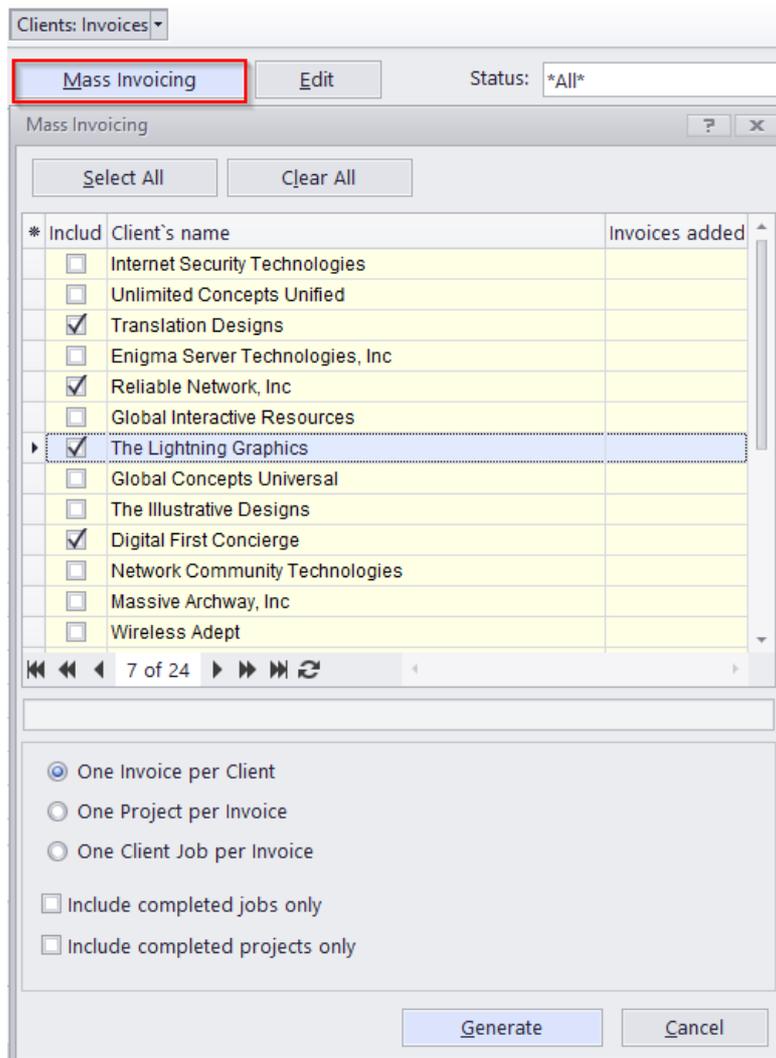
**Use Default Font** resets the RichView font to Times New Roman, size 12.

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

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

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

**Remember last open tab in Clients, Experts, Projects** - check to open new Client/Project/Expert windows on the same tab that the last window of the same type was closed on. Otherwise, new windows will open on the Main tab.



See also:

User settings

# Confirmations

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

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

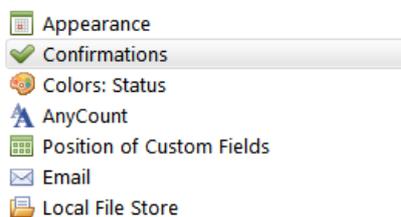
Date Check - checks whether the timelines within jobs and the timelines between projects and their jobs do not contain disparities, (e.g. a job's deadline being earlier than it's assignment, or a job's completion being later than the completion of it's parent project). There are three options for Date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

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

Additional Expert Job Check options:

- **Check Jobs Total** - displays a warning message if the total cost of the Expert Job is greater than that of its parent Client Job.
- **Check Jobs Volume** - displays a warning message if the volume of the Expert Job is greater than that of its parent Client Job.
- **Check Jobs Period** - displays a warning message if the deadline of the Expert Job is later than that of its parent Client Job.
- **Auto Job Price** - searches through the expert's price list when the service or unit of a job is changed and fills in the price if a match is found.

**Approved JA can be 0** - allows for approval on JAs with a total of 0.



Dates check: Assigned, Deadline, Completed:

Notify and deny

Notify and Ignore (optional)

No check

Description:

Middle Level. In case of the dates' disparity, the user will receive an error message with two options: Ignore or Fix the disparity for further processing.

---

Additional Expert Job Check options:

Check Jobs Total

Check Jobs Volume

Check Jobs Period

Auto Job Price

---

Additional JA Check options:

Approved JA can be 0

See also:

User settings

# Colors: Status

Depending on their current status, quotes, projects, jobs, invoices and POs are highlighted with different colors in Projotex. The **Colors: Statuses** section of the **User Settings** window can be used to change these colors.

## Example:

Fragment of the client jobs table, as seen in the Projotex Workstation:

Marital contract translation	01.05.2017 18:00
AG/PG Airplane	- No -
Marital contract translation	- No -
Marital contract translation	- No -

In this case, the job status colors are set as follows:

Black — completed.

Green — not completed, deadline in the future.

Blue — not completed and due today.

Red — not completed and overdue.

The following status colors can be changed:

*Quote* statuses:

- **Accepted** (default: green)
- **In Process** (default: blue)
- **Rejected** (default: red)
- **Received** (default: purple)
- **Corrected** (default: darker purple)

*Current Projects and Jobs* statuses:

- **Deadline is in the future** (default: green)
- **Deadline is today** (default: blue)
- **Deadline is in the past** (default: red)

*Outstanding Invoices/POs* statuses:

- **Not Due Yet** (default: green)
- **Due Today** (default: blue)
- **Overdue** (default: red)
- **Not invoiced (POs only)** (default: orange)

*Currently selected row in all tables*: set the text and background color to indicate the currently selected table entry (default: white text on a deep blue background).

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

**Reset all to Default** restores the default colors of all statuses.

- Appearance
- Confirmations
- Colors: Status
- AnyCount
- Position of Custom Fields
- Email
- Local File Store

Current Projects and Jobs:

Deadline is in the future:  Use warning color

Deadline is today:  0 days and

Deadline is in the past:  1 hours in advance

Outstanding Invoices/POs:

Not Due Yet:

Due today:

Overdue:

Not Invoiced (POs only):

Reset All to Default

Quotes:

Accepted:

In Process:

Rejected:

Received:

Corrected:

Currently selected row in all tables:

Text Color:

Background:

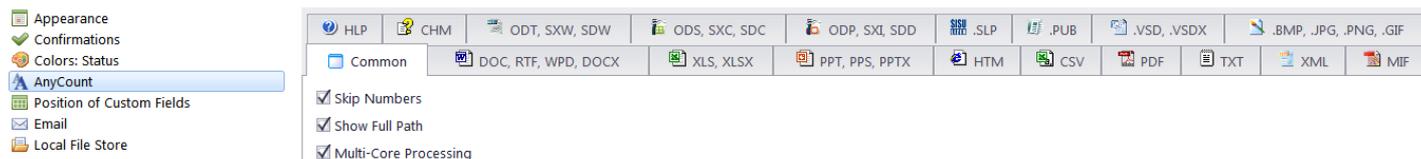
---

See also:  
User settings

# AnyCount

Projetex users can enjoy the built-in AnyCount 3D — a word, character and custom volume unit count tool. It counts single or multiple files of all commonly used file formats: *DOC, DOCX, RTF, XLS, XSLX, PPT, PPS, PPTX, PPSX, PUB, VSD, VSDX, ODT, SXW, SDW, ODS, SXC, SDC, ODP, SXI, SDD, TXT, CSV, GIF, PNG, BMP, JPG, PDF, HTML, XML, HLP, CHM, WPD, SLP, MIF, ZIP, RAR.*

You can specify AnyCount settings (general and specific for different files formats) on the **AnyCount** tab of the **Current User** section in the Backstage view.



## Common Tab

When the **Skip Numbers** check box is selected, AnyCount does not include numbers when performing wordcounts.

If the **Show Full Path** checkbox is selected, then you will see the full path to the processed files in the **AnyCount Notes** field (which appears after you use AnyCount when creating a Client/Expert Job).

Enabling **Multi-core Processing** speeds up counting of large batches of files, but should only be enabled in the host machine is, in fact, multi-core.

## Format-specific Tabs

The rest of tabs can be used to set which elements will be included in count results, and which will not. The number of options is determined by the type of file.

**Note:** You can perform counts of .wpd files only if you can open them with Microsoft Word, i.e. you need special Microsoft Word .wpd processing packages to be installed.

**Note:** To count unrecognized PDF files, go to the **PDF settings** tab, enable the **Enable PDF Graphic Recognition** checkbox and select the **PDF Graphic Recognition Language** from the drop-down list. To count a recognized PDF file, disable the **Enable PDF Graphic Recognition** checkbox

See also:

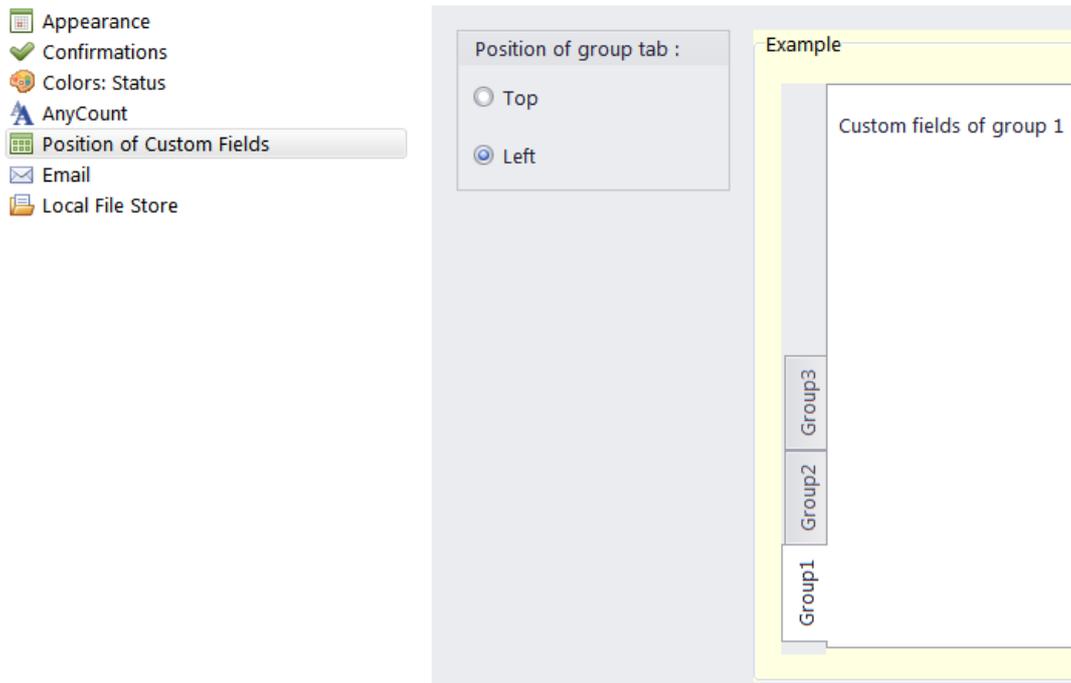
User settings

AnyCount in Projetex

# Position of Custom Fields

On the **Position of Custom Fields** tab of the **User Settings** you can alter the view of custom field groups.

Check the **Top** option to place custom group tabs on the top of the tab main field. Check the **Left** option to place custom group tabs on the left of the field.



---

See also:

User settings

Custom fields

# Email

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

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

The screenshot shows a software interface with a sidebar on the left and a main configuration window on the right. The sidebar contains several menu items: Appearance, Confirmations, Colors: Status, AnyCount, Position of Custom Fields, Email (highlighted), and Local File Store. The main window is titled "SMTP Server" and contains the following fields and controls:

- Server: [Text input field]
- Connection: [Dropdown menu, currently set to "Regular"]
- Port: [Text input field, currently set to "25"]
- Use Authentication
- User Name: [Text input field]
- Password: [Text input field]
- Save outgoing mail into IMAP folder: [Dropdown menu, currently set to "Do not save mail"] and a "Configure..." button.
- From section:
  - Name: [Text input field, currently set to "William McSun"]
  - Email Address: [Text input field, currently set to "wms@translation3000.com"]
  - Organization: [Text input field, currently set to "Vitaliy Gutyk"]
- Connection Test: [Button with a gear icon]

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

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

The screenshot shows the "Edit IMAP Sent Folder" window. It contains the following fields and controls:

- IMAP Server section:
  - Server: [Text input field]
  - Connection: [Dropdown menu, currently set to "Regular"]
  - Port: [Text input field, currently set to "143"]
  - User Name: [Text input field]
  - Password: [Text input field]
- Request IMAP Folder List: [Button]
- IMAP Sent Folder: [Dropdown menu, currently set to "Do not save mail"]
- OK: [Button]
- Cancel: [Button]

You can also specify the default 'From' line of your Projetex-generated e-mails by entering your name, e-mail and company name. Click **Connection Test** to check if the connection parameters were entered correctly.

---

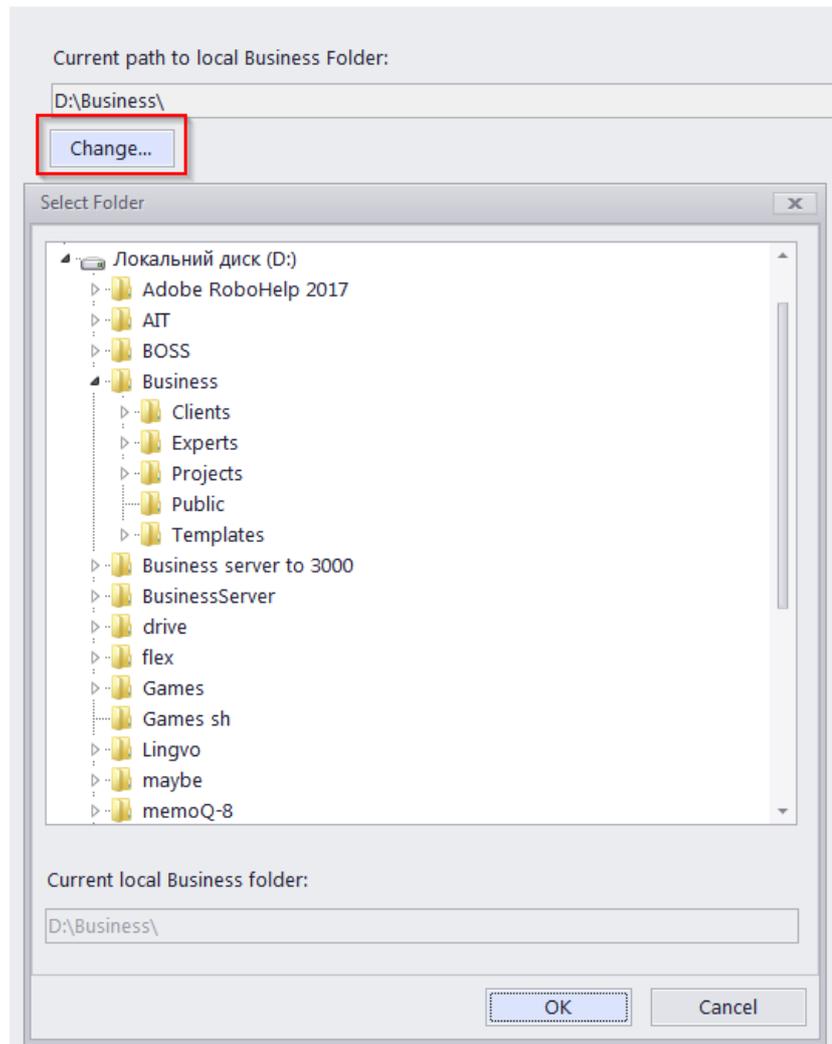
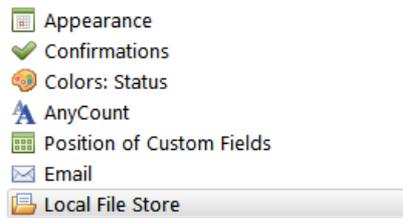
See also:

[User settings](#)

[Mail Sender](#)

# Local File Store

On this tab you can select the location of your local Business folder.



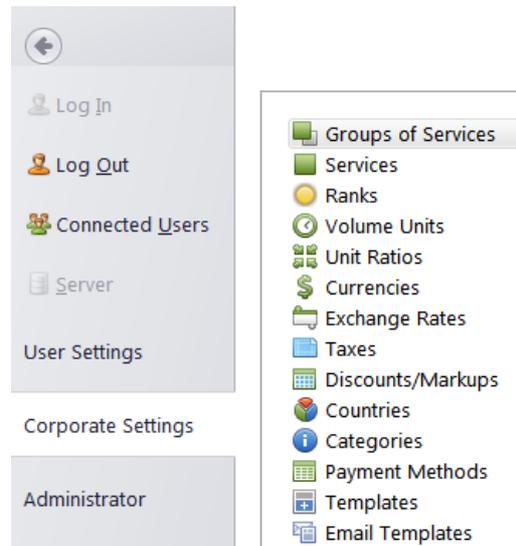
To set the location, click Change and navigate to the desired folder.

---

See also:  
User settings

# Corporate settings

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



- **Groups of Services** — enter broad categories of the services you provide. This info is used in price, quote and job records.
- **Services** — each group contains a separate list of services (most commonly these are language pairs). Also used in price, quote and job records.
- **Ranks** — enter special ranks to link corporate experts with groups of services, according to their specializations.
- **Volume Units** — in addition to standard volume units you can add custom units to account prices, quotes and jobs in.
- **Unit Ratios** — set up "exchange rates" between your base unit and other units. These rates will be used to calculate the total volume of work over a specific periods.
- **Currencies** — currencies can be added from here.
- **Exchange Rates** — set up exchange rates between your base currency and other currencies. These rates will be used to keep records in two currencies for your clients.
- **Taxes** — taxes are used in invoices. You can add or edit taxes here.
- **Discounts/Markups** — add or edit discounts and markups here. Once added, these can later be inserted into invoices.
- **Categories** — add or edit categories which are used in the Info tab.
- **Countries** — by default, the database contains a list of all countries (used in client profiles). This list can be edited here.
- **Payments Methods** — payment methods and their descriptions can be added to invoices.
- **Templates** — manage the RTF templates for all work documentation.
- **Email templates** — manage the text templates for the Mail Sender.

---

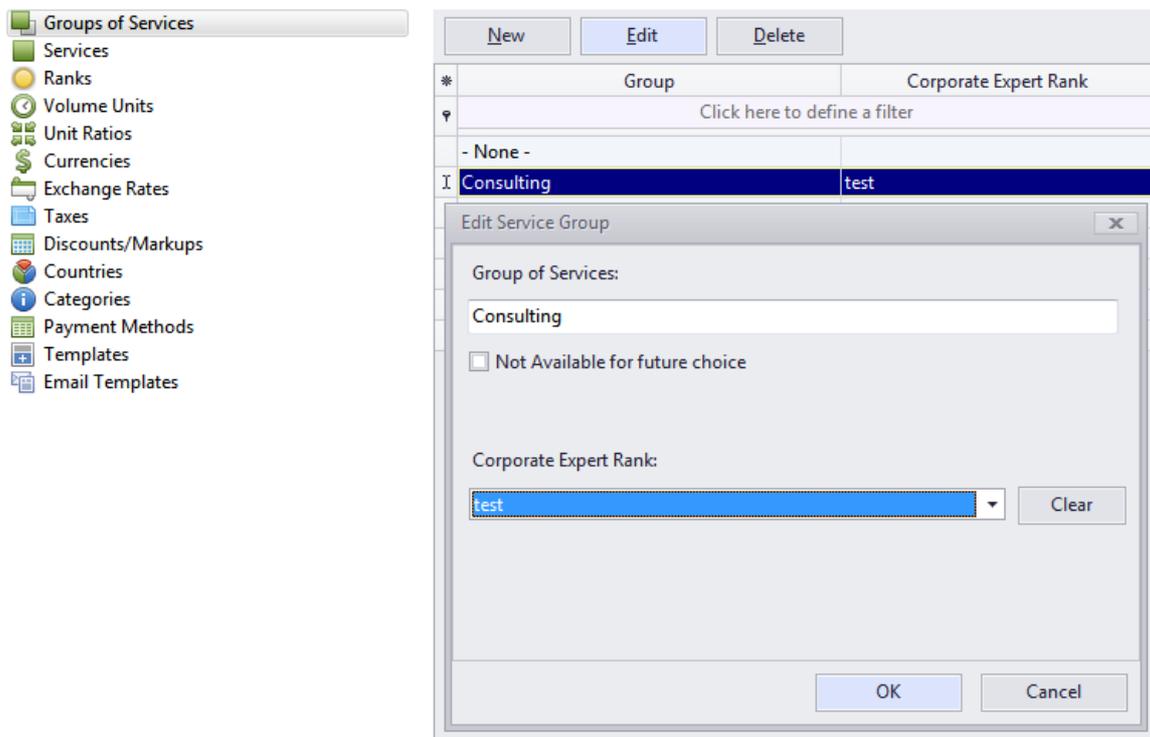
See also:

[User settings](#)

[Administrator settings](#)

# Groups of Services

The **Groups of Services** section of the Projetex Workstation **Corporate Settings** can be used to specify the kinds of services (groups of services, in other words) you offer to your clients (e.g. translating, editing and so on.). When creating jobs or setting prices in Projetex, you will have to select a group of services among those created here.



The **New** button opens the **New Service Group** window, where you can enter the name for a new group of services (50 characters maximum), select whether the group is available in drop-down menus when creating/editing a job, and, optionally, tie the group to a Rank.

The **Edit** button opens the currently highlighted group of services for editing.

The **Delete** button deletes the currently highlighted group of services.

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

---

See also:

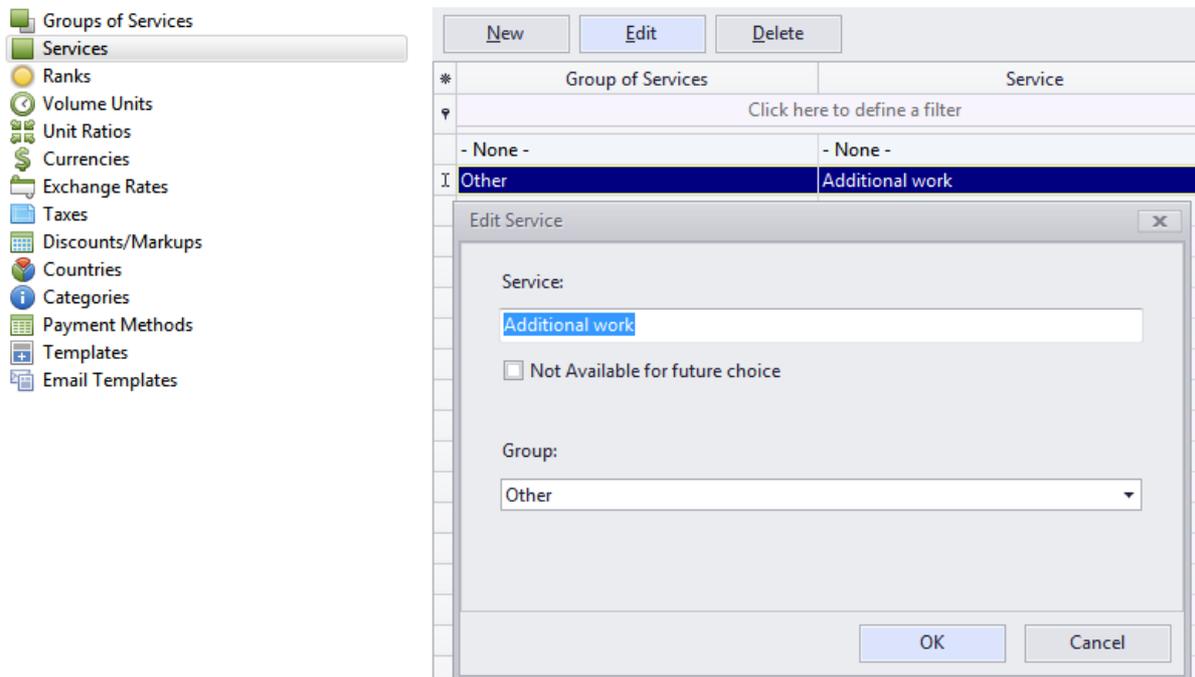
Corporate settings

Services

# Services

The **Services** section of the **Corporate Settings** window you can enter a list of services you offer to your clients; (e.g. translating from English to French, Localization testing, etc.). While creating jobs or setting prices in Projotex you will need to select a service from the list created here.

Each service belongs to a group of services.



The **New** button opens the **New Service** window which can be used to enter the name for a new service (50 characters maximum), select a group of services, and select whether the service is available in drop-down menus when creating/editing a job.

The **Edit** button opens the currently highlighted service for editing.

The **Delete** button deletes the currently highlighted service.

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

See also:

Corporate settings

Groups of Services

# Ranks

In the Ranks section of **Corporate Settings**, you can enter a list of special ranks for your corporate experts.



The **New** button opens the **New Rank** window, where you can enter the name for a new rank (50 characters maximum).

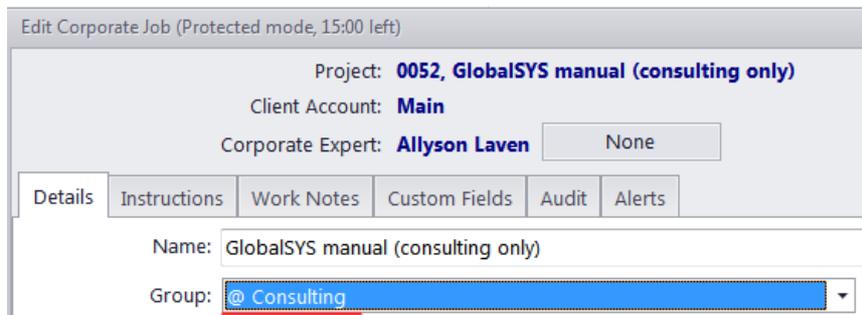
The **Edit** button opens the currently highlighted volume unit for editing.

The **Delete** button deletes the currently highlighted volume unit.

After a rank is created you can assign it to corporate experts in their Profiles, and to service groups in the **Groups of Services** section.



After that, whenever you assign an expert to a corporate job, the Groups of Services that match the expert's Rank will be displayed in the drop-down menu with a '@' character before the name. This will make it easier to distribute jobs according to the your experts' skill sets.



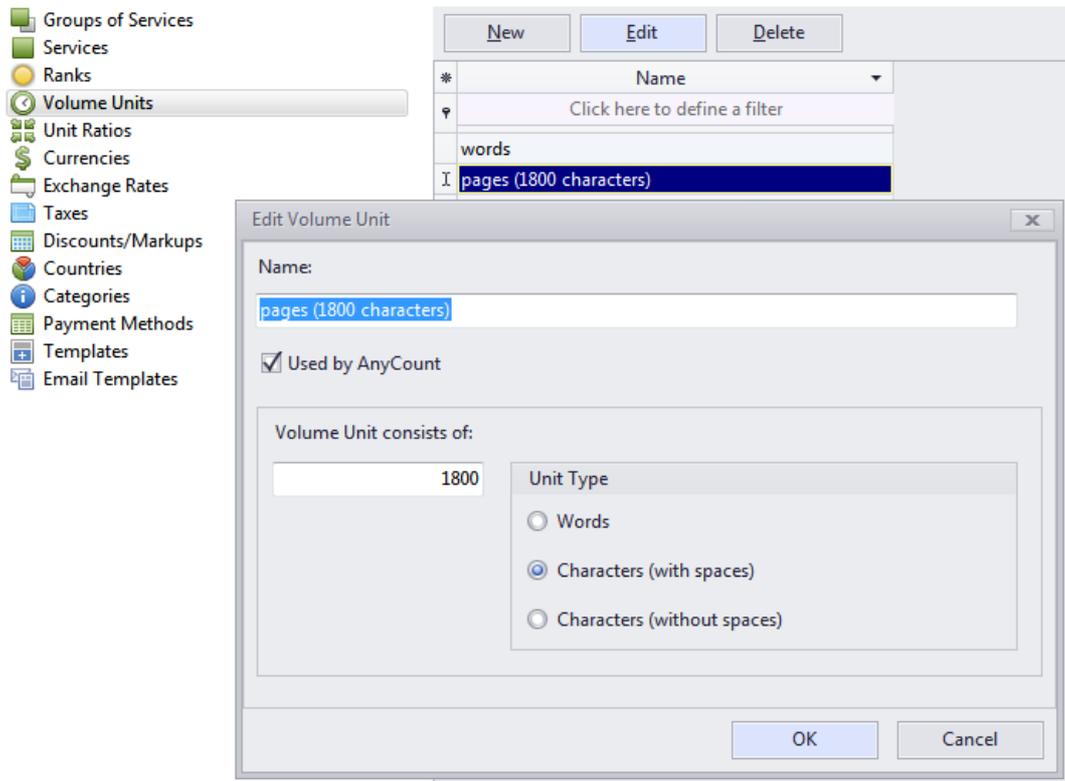
See also:

Corporate settings

Groups of Services

# Volume Units

On the **Volume Units** tab of the **Corporate Settings** window you can create and manage the a of custom volume units, used for estimating volumes of jobs.



The **New** button opens the **New Volume Unit** window, where you can enter the name for a new volume unit (50 characters maximum) and specify it's properties.

The **Edit** button opens the currently highlighted volume unit for editing.

The **Delete** button deletes the currently highlighted volume unit.

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

- select the **Used by AnyCount** option;
- specify if it consists of words/characters (with or without spaces) by selecting the correspondent option and the number of words/characters in the new unit. (For example, volume unit "pages" can consist of 1800 characters with spaces).

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

---

See also:

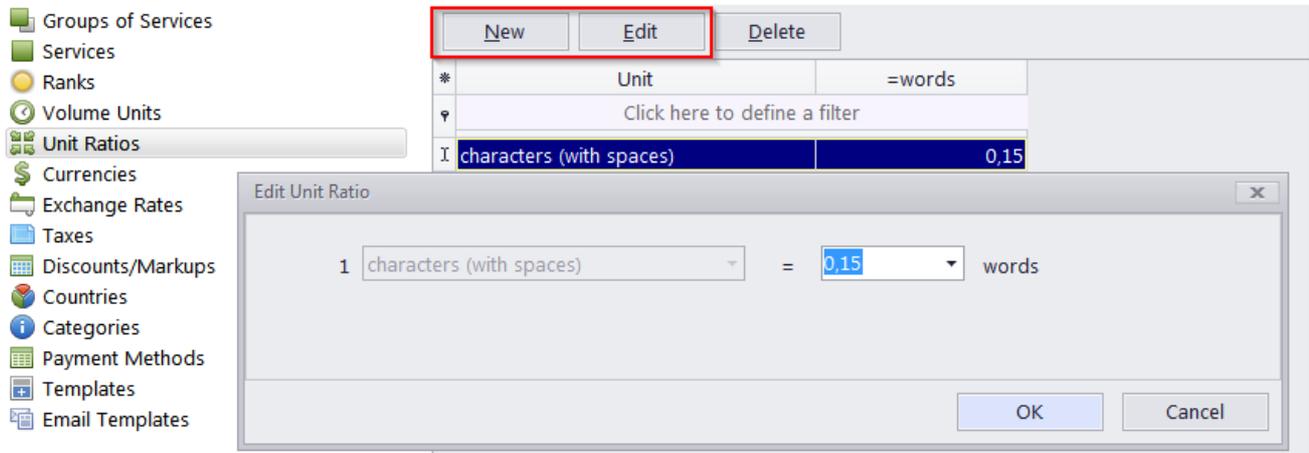
Corporate settings

Unit Ratios

# Unit Ratios

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

This is used when calculating job volumes as converted into basic units and when determining a corporate expert's total experience (the total volume of all jobs completed by the expert, converted into basic units).



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

The **Edit** button opens the currently highlighted unit ratio for editing.

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

---

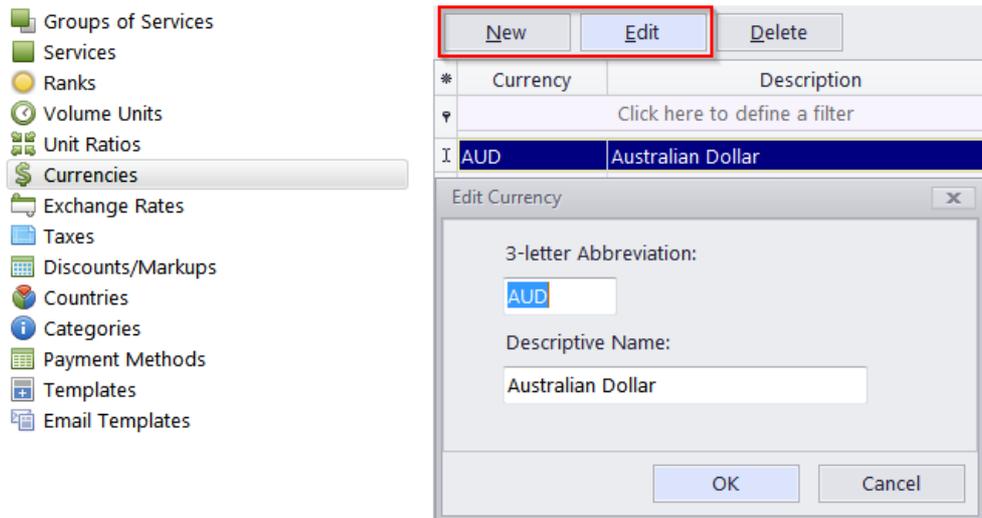
See also:

Corporate settings

Volume Units

# Currencies

In the **Currencies** section of the **Corporate Settings** window you can create and manage a list of currencies, which you will be able to use in all Projotex financial records.



The **New** button opens the **New Currency** window, where you can enter the 3-letter abbreviation for the new currency and the description of the currency (i.e. the long name, 50 characters maximum) in the corresponding fields.

The **Edit** button opens the currently highlighted currency for editing.

The **Delete** button deletes the currently highlighted currency.

**Note:** A currency cannot be deleted if it is used in any field in the Database (price, quote, job, etc.).

See also:

Corporate settings

Exchange Rates

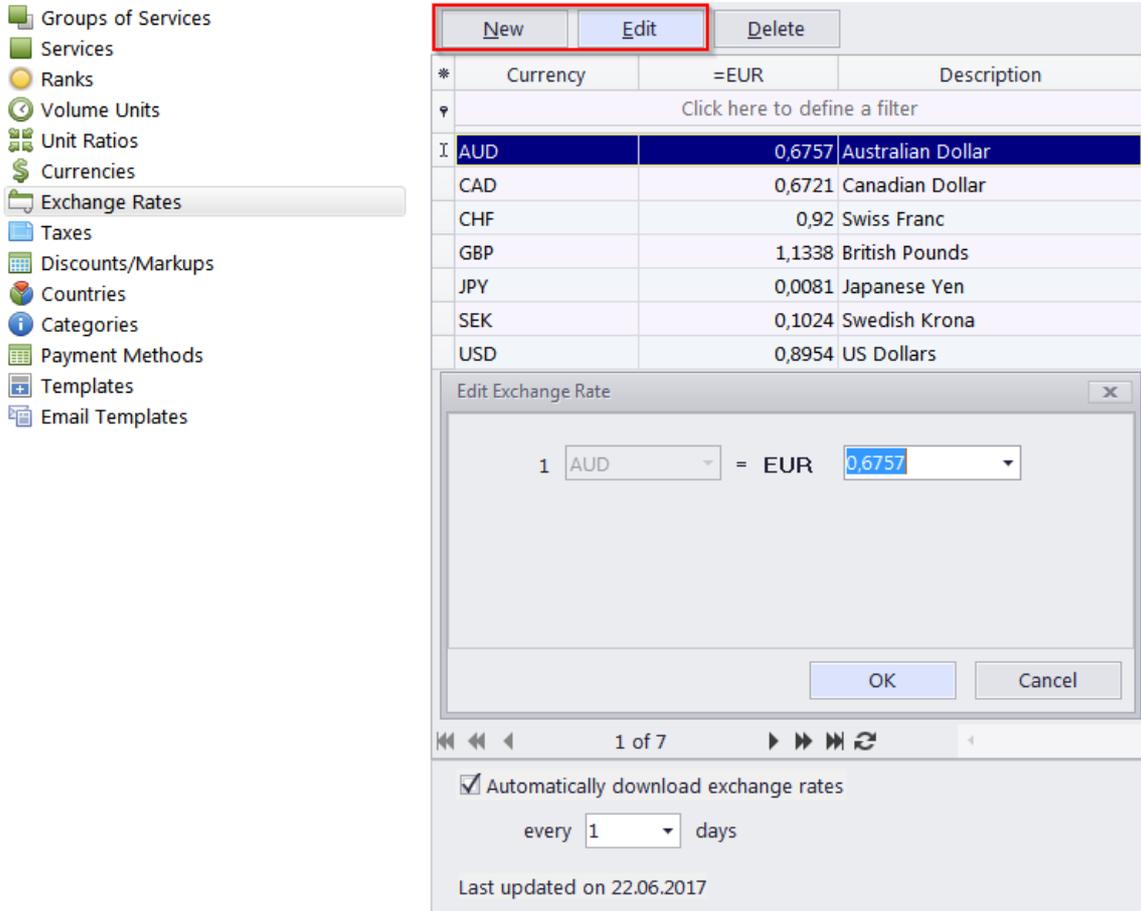
Currencies Management

# Exchange Rates

In Projetex, different currencies can be assigned to each client and expert. To maintain consistency of financial accounts, Projetex uses exchange rates to re-calculate all the records from client/expert currencies to the base currency of your company.

 **Note:** The base currency is set on the **General** section of the **Administrator** tab in the Backstage view.

The **Exchange Rates** tab of the **Corporate Settings** window can be used to edit the exchange rates between your base currency and other currencies used by your clients and experts.



* Currency	=EUR	Description
AUD	0,6757	Australian Dollar
CAD	0,6721	Canadian Dollar
CHF	0,92	Swiss Franc
GBP	1,1338	British Pounds
JPY	0,0081	Japanese Yen
SEK	0,1024	Swedish Krona
USD	0,8954	US Dollars

1 AUD = EUR 0.6757

Automatically download exchange rates  
every 1 days  
Last updated on 22.06.2017

The **New** button opens the **New Exchange Rate** window, where you can select the required foreign currency from a drop-down list and specify the rate.

The **Edit** button opens the currently highlighted exchange rate for editing.

The **Delete** button deletes the currently highlighted exchange rate.

Check **Automatically download exchange rates** and select or enter the desired frequency to periodically receive new exchange rates from the Internet.

 **Note:** The currencies list consists of currencies added on the **Currencies** section of the **Corporate Settings** tab.

See also:

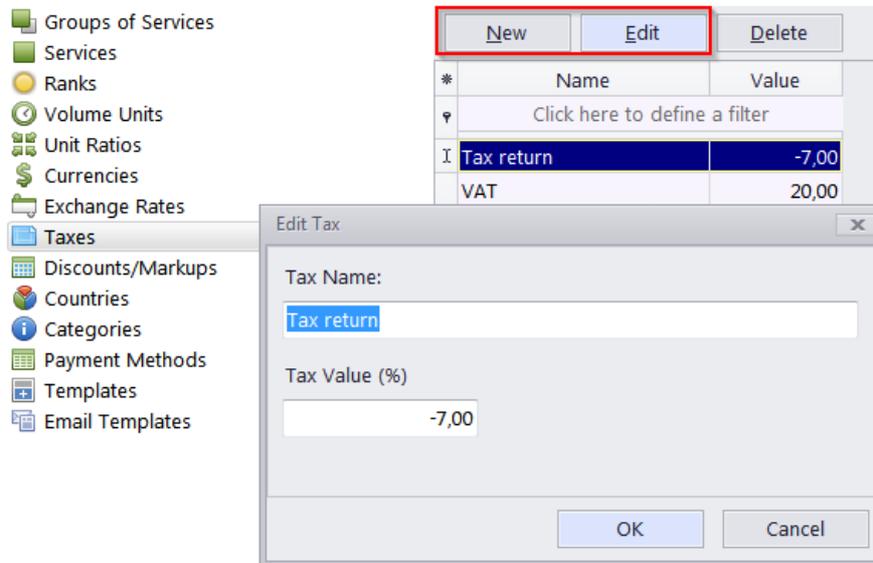
Corporate settings

Currencies

Currencies Management

# Taxes

Any taxes used in invoices and purchase orders can be added on the **Taxes** section of the **Corporate Settings** window.



The **New** button opens the **New Tax** window, where you can enter the tax name (50 characters maximum) and value (rate) in the appropriate fields. Note that the tax rate is entered as a percentage (but without the "%" sign). Tax returns can be entered as a negative value.

The **Edit** button opens the currently highlighted tax rate for editing.

The **Delete** button deletes the currently highlighted tax rate.

---

See also:

Corporate settings

Discounts/Markups

# Discounts/Markups

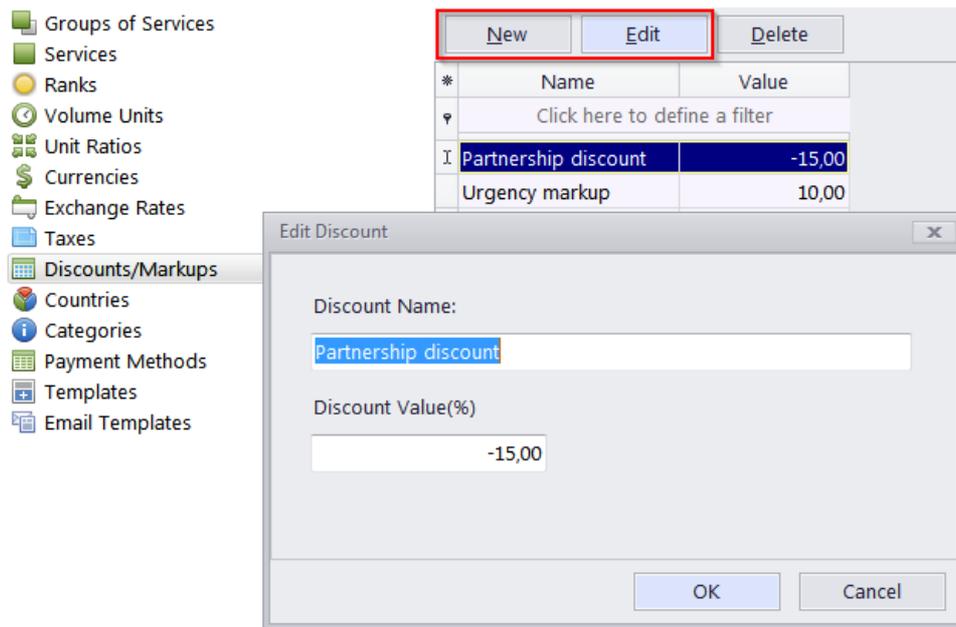
Projetex provides you with the ability to add discounts and markups when issuing invoices and POs.

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

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

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

Use the Edit/Delete buttons to edit or delete the currently highlighted discount/markup.



---

See also:

Corporate settings

Taxes

# Countries

When creating a new client or freelancer record in Projetex you can enter the postal address and specify the country by selecting it from a drop-down list. On the **Countries** tab of the **Corporate Settings** window you can manage the list of countries. The entries for each country contain it's name, flag (optionally), and time zone.

 Groups of Services	<table border="1"><tr><td><a href="#">New</a></td><td><a href="#">Edit</a></td><td><a href="#">Delete</a></td></tr><tr><th>*</th><th>Name</th><th>Time Zone</th><th>Time Zone Registry Name</th><th>Flag</th></tr><tr><td>▼</td><td colspan="4">Click here to define a filter</td></tr><tr><td>▶</td><td>Afghanistan</td><td>(UTC+04:30) Kabul</td><td>Afghanistan Standard Time</td><td></td></tr><tr><td></td><td>Albania</td><td>(UTC-09:00) Alaska</td><td>Alaskan Standard Time</td><td></td></tr><tr><td></td><td>Algeria</td><td>(UTC+01:00) West Central Africa</td><td>W. Central Africa Standard Time</td><td></td></tr><tr><td></td><td>Andorra</td><td>(UTC+01:00) Amsterdam, Berlin, Be</td><td>W. Europe Standard Time</td><td></td></tr><tr><td></td><td>Angola</td><td>(UTC+01:00) West Central Africa</td><td>W. Central Africa Standard Time</td><td></td></tr></table>	<a href="#">New</a>	<a href="#">Edit</a>	<a href="#">Delete</a>	*	Name	Time Zone	Time Zone Registry Name	Flag	▼	Click here to define a filter				▶	Afghanistan	(UTC+04:30) Kabul	Afghanistan Standard Time			Albania	(UTC-09:00) Alaska	Alaskan Standard Time			Algeria	(UTC+01:00) West Central Africa	W. Central Africa Standard Time			Andorra	(UTC+01:00) Amsterdam, Berlin, Be	W. Europe Standard Time			Angola	(UTC+01:00) West Central Africa	W. Central Africa Standard Time	
<a href="#">New</a>		<a href="#">Edit</a>	<a href="#">Delete</a>																																				
*		Name	Time Zone	Time Zone Registry Name	Flag																																		
▼		Click here to define a filter																																					
▶		Afghanistan	(UTC+04:30) Kabul	Afghanistan Standard Time																																			
		Albania	(UTC-09:00) Alaska	Alaskan Standard Time																																			
		Algeria	(UTC+01:00) West Central Africa	W. Central Africa Standard Time																																			
		Andorra	(UTC+01:00) Amsterdam, Berlin, Be	W. Europe Standard Time																																			
		Angola	(UTC+01:00) West Central Africa	W. Central Africa Standard Time																																			
 Services																																							
 Ranks																																							
 Volume Units																																							
 Unit Ratios																																							
 Currencies																																							
 Exchange Rates																																							
 Taxes																																							
 Discounts/Markups																																							
 Countries																																							

The **New** button opens the **New Country** window.

The **Edit** button opens the currently highlighted country for editing.

The **Delete** button deletes the currently highlighted country.

 **Note:** By default, the Projetex database already contains an extensive list of countries.

 **Note:** A country cannot be deleted if it is used in any field in the database (for example, in a postal address for a client).

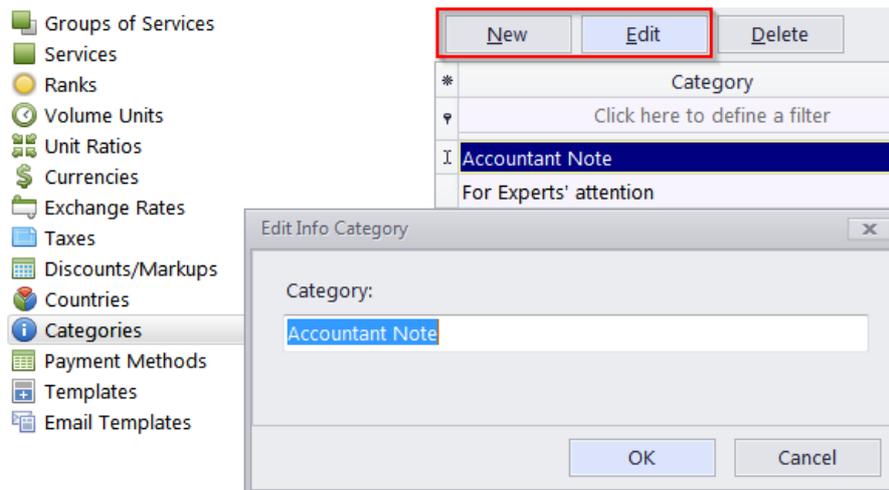
---

See also:

[Corporate settings](#)

# Categories

The **Categories** setting can be used to add, edit and remove custom types of info notes, which are displayed in **Info** tabs of the **Client**, **Project**, **Corporate Expert** and **Freelancer** windows. These categories can be then used to filter and sort the notes



The **New** button opens the **New Info Category** window. Enter name for the new category (50 characters maximum) and click **OK**.

The **Edit** button opens the currently highlighted category for editing.

The **Delete** button deletes the currently highlighted category.

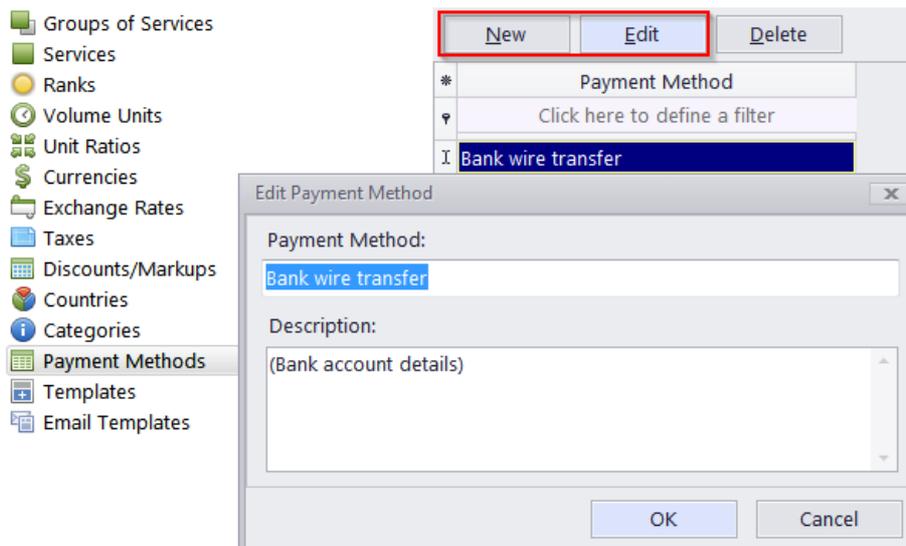
---

See also:

Corporate settings

# Payment Methods

The payment method is one of the many parameters that can be added to an invoice when it is issued in Projetex. In this context *Payment method* means the details for performing the payment (bank details, for example).



**New** button opens the **New Payment Method** window. Enter the name (150 characters maximum) and description of the payment method in the corresponding fields.

**Edit** button opens the currently highlighted payment method for editing.

**Delete** button deletes the currently highlighted payment method.

---

See also:

Corporate settings

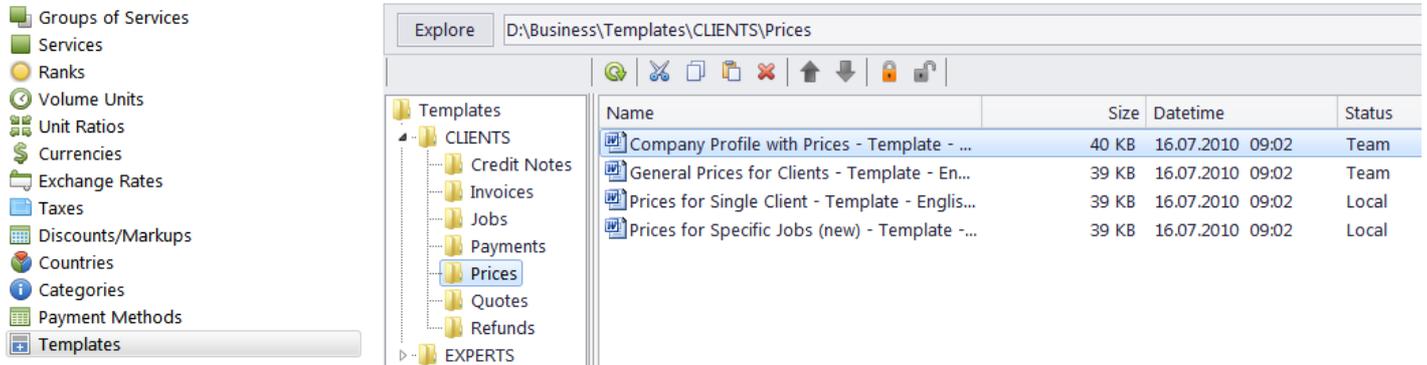
# Templates

The **Templates** section of corporate settings can be used to view, manage, and edit document templates and their folder structure.

Double-clicking a template will open it in the system's default RTF editor.

Clicking **Explore** will open the current folder in Windows Explorer.

The toolbar under the folder path contains buttons for the following commands: **Refresh, Cut, Copy, Paste, Delete, Upload, Download, Lock, Unlock.**



## Template Folders

In Projotex all templates are stored in subfolders of the *Templates* folder in the centralized *BusinessServer* folder on the server. In order to work with a template, you will need to download a local copy, or create a new local template which later can be uploaded to the server. Each template can have one of the following statuses:

**Team** - the templates stored in the folder on the server and in local storage are identical.

**Team - Changed on Workstation** - the local copy of the template file has been modified, the file on the server has not been updated.

**Team - Changed on Server** - the template file on the server has been modified, the local copy has not been updated.

**Team - Missing** - this template exists on the server, but has not been downloaded to the local PC yet (or has been deleted locally).

**Local** - the template file exists locally, but has not been uploaded to the server yet (or has been deleted on the server).

The tree field displays the structure of the templates folders. This folder structure exists both in the *BusinessServer* folder, and in your local *Business* folder. The templates folder contains of four subfolders: CLIENTS, EXPERTS, PROJECTS and PROSPECTS.

CLIENTS and EXPERTS contain more subfolders with correspondent .RTF templates. The templates for each document type are stored in folders named after the document type.

---

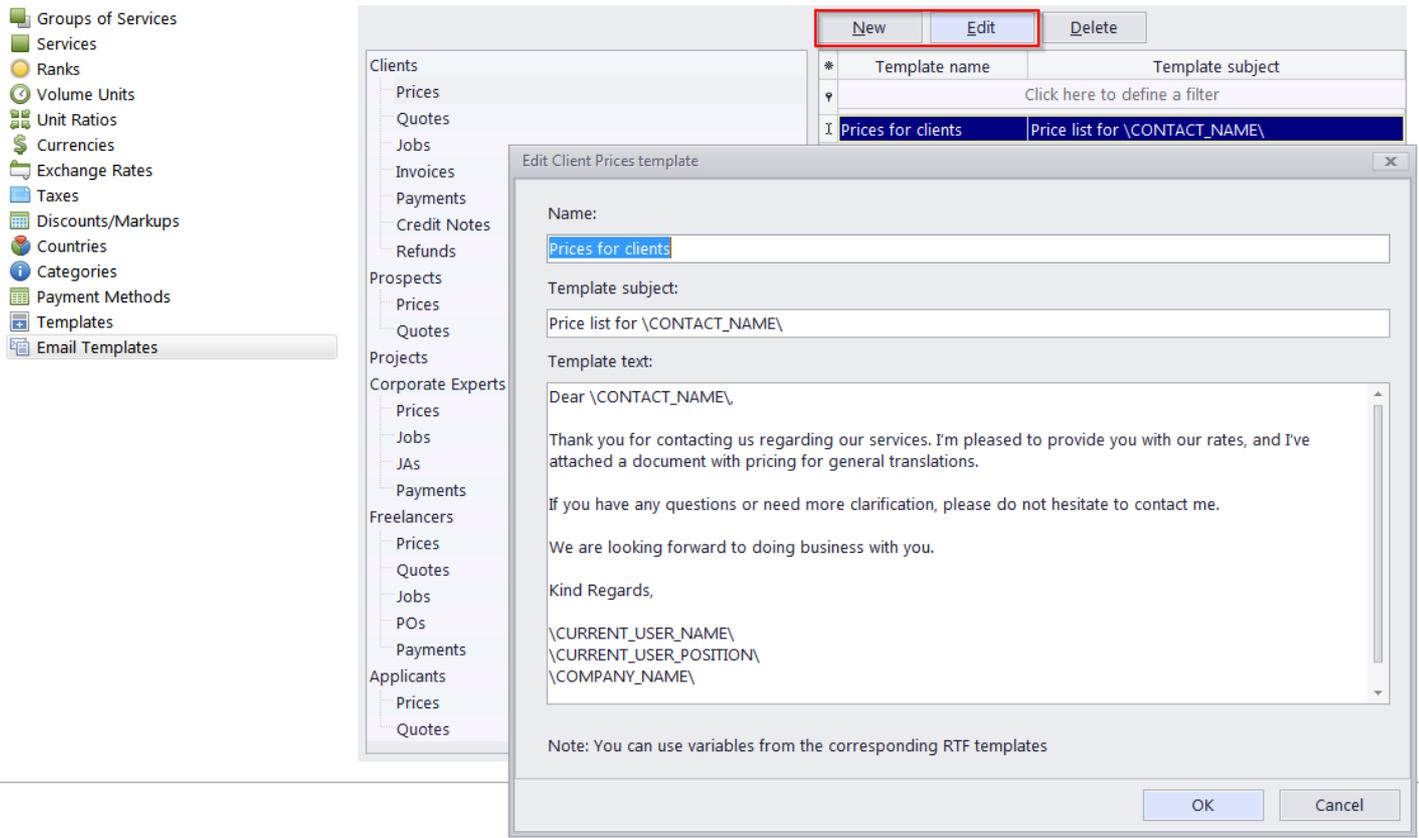
See also:

[Corporate settings](#)

[Template Basics](#)

# Email Templates

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



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

Use the **New**, **Edit** and **Delete** buttons to manage the email templates of the currently selected type.

The New/Edit template window allows you to enter/edit the name, subject, and text of your mail templates.

The subject and text can include data variables, just like RTF document templates.

---

See also:

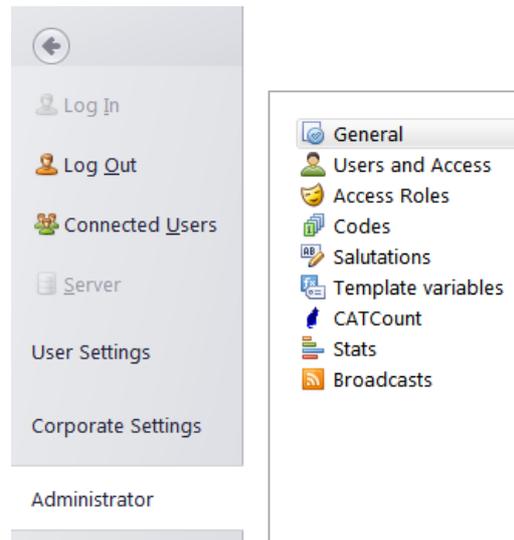
Corporate settings

Email

Mail Sender

# Administrator settings

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



The following **Administrator Settings** are available:

- [General](#) - selecting or changing the *base currency*, base volume unit and postal address display format.
- [Users and Access](#) - manage the user accounts of your employees and determine their access rights within the system
- [Access Roles](#) - manage special access right configurations for quicker creation and setup of new users.
- [Codes](#) - viewing and editing global **Project** and **Invoice** codes.
- [Salutations](#)- list of default salutations, which can be automatically added to contact names.
- [Template Variables](#) - used to create custom template variables, used for generation of .rtf files.
- [CATCount](#) - enabling and disabling CATCount feature and selecting CATCount units.
- [Stats](#) - option for visual representation of corporate expert experience
- [Broadcasts](#) - create system-wide information broadcasts to your employees

---

See also:

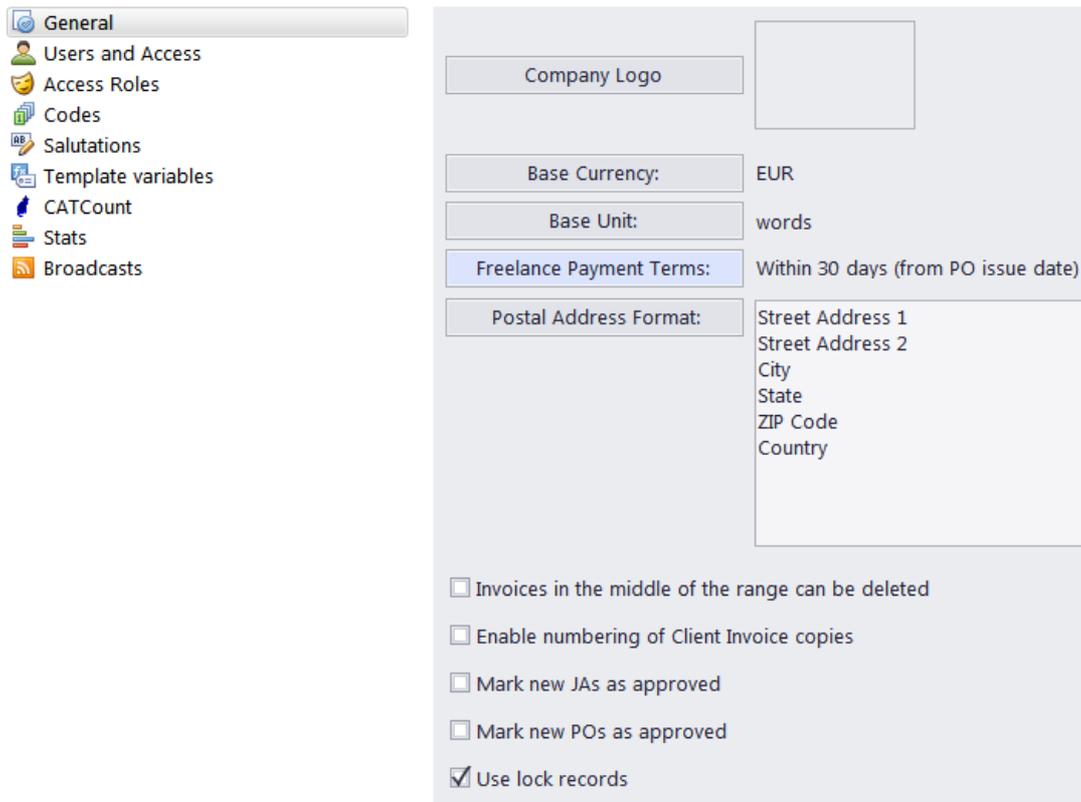
[User settings](#)

[Corporate settings](#)

[Server Corporate Settings](#)

# General

On the **General** tab of the **Administrator** window you can set the company logo, base currency, payment terms for freelancers and postal address format, as well as a few procedural options.



Company Logo	
Base Currency:	EUR
Base Unit:	words
Freelance Payment Terms:	Within 30 days (from PO issue date)
Postal Address Format:	Street Address 1 Street Address 2 City State ZIP Code Country

Invoices in the middle of the range can be deleted

Enable numbering of Client Invoice copies

Mark new JAs as approved

Mark new POs as approved

Use lock records

The **Company Logo** button can be used to set your company logo as it will appear on the Backstage view button in the Workstations.

The **Base Currency** button can be used to set or change the base currency of your company. After changing the base currency the program will prompt you to re-define the currency exchange rates.

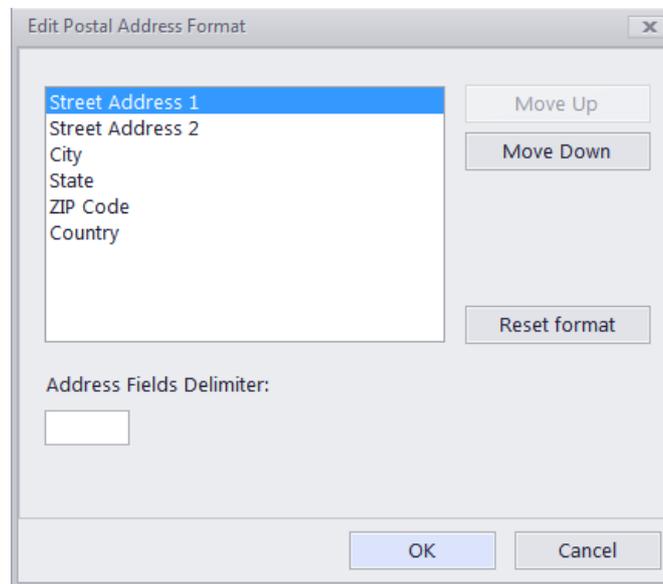
**Base Unit** defines the volume unit against which all other units are measured. Base units are used to calculate corporate job totals and expert experience (total volume of all jobs completed by the expert, converted into base units). When you change the base unit, you are automatically prompted to re-define the unit ratios for the other units.

The **Freelancer Payment Terms** button can be used to edit the default payment terms for freelancers. Click this button to open the **Edit Payment Terms for Freelancers** window. There you can configure the payment conditions for freelancers, including:

- The **Minimum Fee** — the minimum sum POs must accumulate, before they can be paid. Type 0 in this field to disable the **Minimum Fee** condition.
- You can also indicate if a PO should be paid within a certain time (30, 45, 60, or 90 days) from the day it was sent (*PO issue date*), completed (*PO completion date*), the day the job was invoiced (*Invoice date*) or on a certain day of a certain month.
- Select **Unknown/Other** to disable automatic payment terms control.
- **Additional Notes** — a plain text note, not limited by the number of characters.

**Note:** To set individual payment terms for specific freelancers, use the **Payment Terms** button in the freelancer's profile on the **Main** tab of the **Freelancer** window.

The **Postal Address Format** button can be used to set the default display order of postal address elements (like country, city, ZIP code and so on) in printed documents. Use the **Move Up** and **Move Down** buttons to change the order of postal address elements. If you need to separate postal address elements using some special character (like a comma), you can type this delimiter in the **Address Fields Delimiter** field.



The **Invoices in the middle of range can be deleted** check box deactivates default security system that does not allow deletion of invoices, which are in the middle of range.

Check **Enable numbering of Client Invoices copies** to add the **Number of copies** field to the **Edit Invoice** window. The number specified in that field can be added to printed invoices via the `\INVOICE_COPY\` variable.

**Mark new corporate jobs as approved** - select this checkbox to have all new corporate jobs automatically marked as approved.

**Mark new freelance jobs as approved** - select this checkbox to have all new freelance jobs automatically marked as approved.

**Use Lock Records** prohibits simultaneous editing of the same record from different workstations. Edit windows on any workstations except the first to access the same record will be opened in read-only mode.

---

See also:

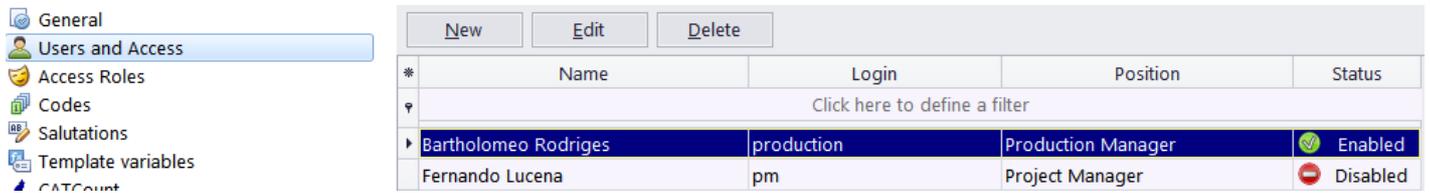
Administrator settings

Currencies

Volume Units

# Users and Access

The **Users and Access** area can be used to browse existing user accounts, create new users and modify the access rights of existing users.



Double-click any user in the list to edit their access rights.

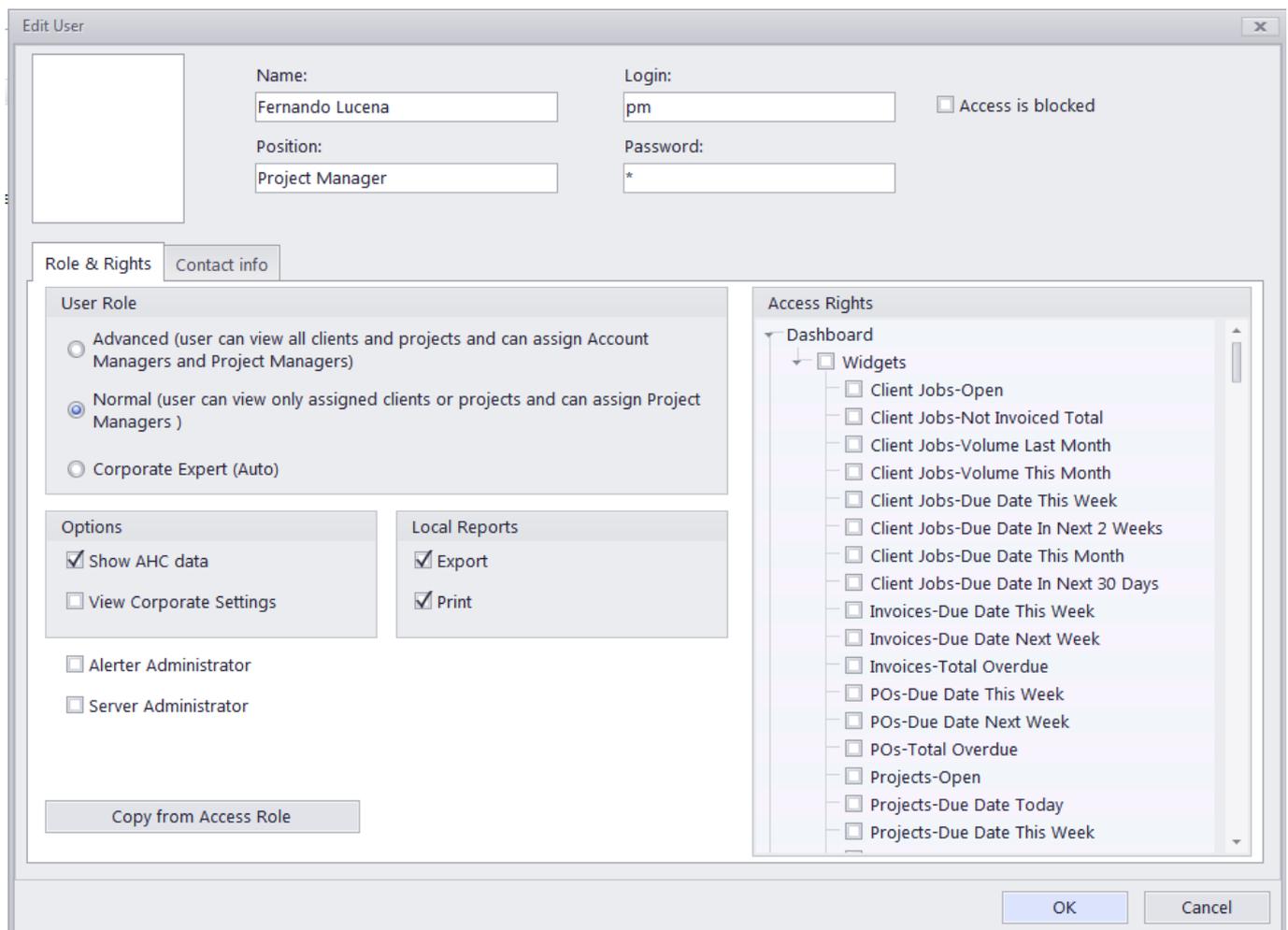
Click the **New** button to add a new user account.

Click the **Edit** button to edit the currently selected user account.

Click the **Delete** button to delete the currently selected user account.

## New/Edit User Window

In this window, the access rights of a user can be configured.



**Photo** — an image file with a Max resolution of 70x70 pixels. Click the frame to either **Load** a photo from a file or click **Assign from The Camera** to take a picture with a camera connected to the machine. The following formats can be used: JPG, JPEG, .BMP (bitmap), .GIF (Graphics Interchange Format).

The **Name** field is used to enter the actual full name of the user. This name will be used in Projetex to refer to this user. This is not a login name.

The **Login** field stores the user name used to log in to Projetex.

The **Password** field stores this user's password. Passwords are case-sensitive.

The **Position** field contains the description of the user's position. Usually this is the name of the *Access role* preset. The position

field does not affect any actual access rights.

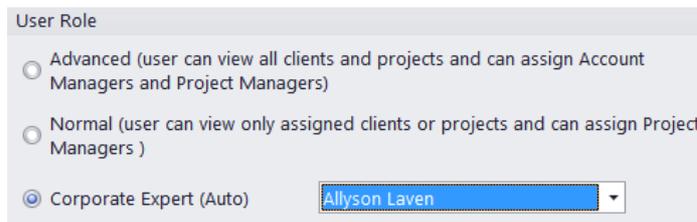
The **Access is blocked** check box can be used to disable this user's account.

## Role & Rights tab

You can quickly assign pre-defined access rights to this user by clicking the **Copy from Access Role** button. This will copy settings from one of the access roles you have previously defined in the **Access Roles** tab.

Each user can have one of three general access levels:

- **Advanced** is the highest access level possible. Users with advanced access can view all clients and projects in the database. These users can also assign account managers and project managers, as well as create client product lines.
- **Normal** access level permits a user to view only assigned clients and projects. Thus, if a normal access level user is not a project manager of a project, or not an product line project manager of the client's product line, he or she cannot view this project. This access level is recommended for project managers.
- **Corporate Expert (Auto)**. This access level is always associated with a particular expert profile, chosen via drop-down list. This user will have access only to that particular expert profile and the records and files associated with it. The user will also have access to the Team and Expert knowledgebases.



**Show AHC data** - select his check box to permit the current user access to the *average hourly cost* rates of in-house translators experts.

The **Export** and **Print** options in the **Local Reports** block - toggle these to determine the user's access to local export and print functions.

**View Corporate Settings** - check to enable access to **Corporate Settings** in the Backstage for the current user.

**Alerter Administrator** - if checked, the user can log into the Automation Engine.

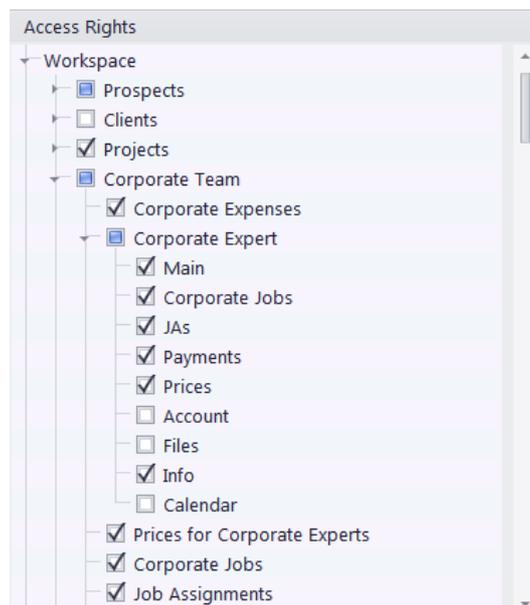
**Server Administrator** - If checked, the user can log into the Server Administrator program and has access to the **Administrator** tab in the Workstation Backstage.

## Access Rights

This area is used to configure the user's access to various Projetex windows and tabs.

Select or clear check boxes to hierarchically grant or deny access to:

1. Sections of the Navigation Bar,
2. Ribbon tabs within the sections,
3. Icons within the Ribbon tabs,
4. and tabs within the Client, Prospect, Project, Corporate Expert, Freelancer, and Applicant tables.



## Contact Info tab

This tab stores the basic contact info for each user account and contains the following fields:

**E-mail** (up to 2) — maximum 250 characters.

**Enable Mail Alert** — enable this check box to allow the user to receive alerts from the Automation Engine to the first e-mail address.

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

## The "Admin" Account

This is the default account that can not be deleted or disabled, has full access to all areas of Projetex and a reduced number of options.

The screenshot shows a dialog box titled "Edit Administrator Account". The title bar includes "Admin", "System Administrator", and "Enabled" with a green checkmark. The dialog contains the following fields and options:

- Login:** Admin
- Password:** A text box containing six asterisks (\*\*\*\*\*).
- Name:** William McSun
- Position:** System Administrator
- E-mail:** An empty text box.
- Enable Mail Alert

At the bottom of the dialog, it states: "Administrator has access to all areas of Projetex." Below this text are "OK" and "Cancel" buttons.

You can alter the account's photo, password, name, position designation, and add an e-mail with the option to send alerts to it.

---

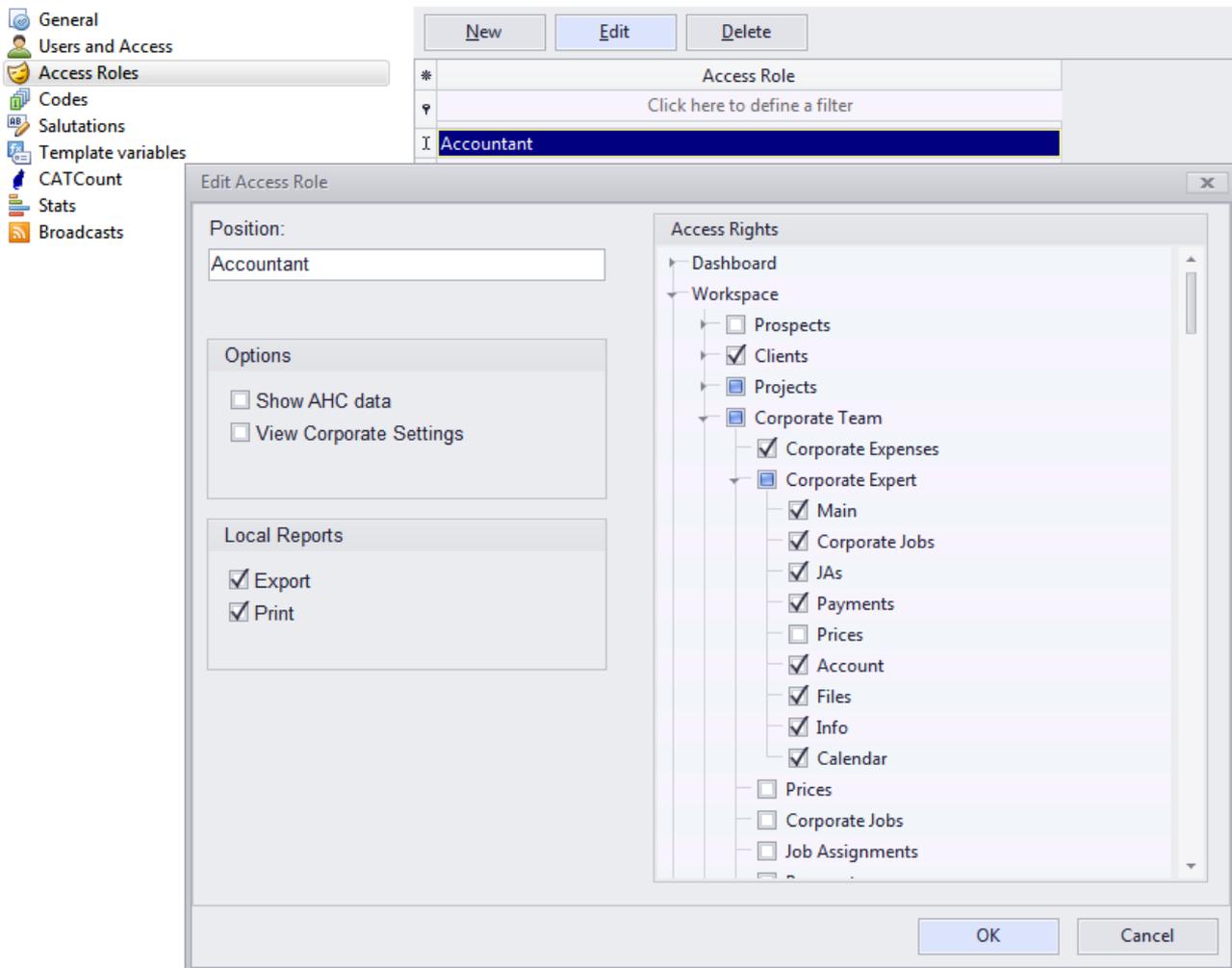
See also:

Administrator settings

Access Roles

# Access Roles

Access roles are presets of access configuration for a number of users with similar access to Projetex windows and tabs. These presets can later be used to quickly assign access rights to new users or change access rights of existing users.



Double-click any access role in the list to edit the access rights granted by that role.

Click the **New** button to add a new user access role.

Click the **Edit** button to edit the currently selected access role.

Click the **Delete** button to delete the currently selected access role.

## New/Edit Access Role Window

In this window access roles can be configured.

The **Position** field contains the description of user's position. This is the name of *Access role* preset.

**Show AHC data** - select his check box to permit the current user access to the *average hourly cost* rates of corporate experts.

The **Export** and **Print** options in the Local Reports block - toggle these to determine the user's access to local export and print functions.

## Access Rights

This area is used to configure the user's access to various Projetex windows and tabs.

Select or clear check boxes to hierarchically grant or deny access to:

1. sections of the Navigation Bar,
2. Ribbon tabs within the sections,
3. Icons within the Ribbon tabs,

4. and tabs within the Client, Prospect, Project, Corporate Expert, Freelancer, and Applicant tables.

---

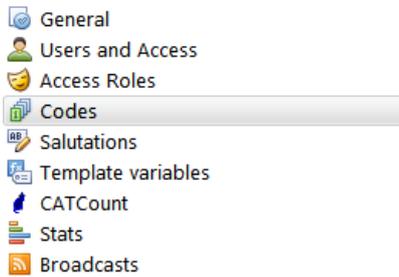
See also:

Administrator settings

Users and Access

# Codes

In Projetex, "global" codes are used to identify projects, clients, experts, invoices and POs. These codes are generated automatically upon creation of the respective item and cannot be edited by users.

A screenshot of the 'Codes' configuration dialog box. It is divided into three main sections. The top section, 'Next Codes:', shows 'Next Project Code: 61', 'Next Global Invoice Code: 73', and 'Next Global PO Code: 62'. The middle section, 'Global Invoice Codes:', has a 'Prefix:' field with 'ACME-I' and an example 'e.g. AIT-I-', and a 'Suffix:' field with '/YYYY' and an example 'e.g. /YYYY'. Below this is the text 'Available variables: YYYY. YY: Year. MM: Month. DD: Date' and a checkbox for 'Enable annual numbering resets:'. Underneath the checkbox are 'Month:' and 'Day:' labels, with a 'Numbering reset date:' field showing 'January' and '1'. The bottom section, 'Codes in naming of .RTF files', has two dropdown menus: 'Invoices for Clients:' set to 'Client-Specific' and 'POs for Experts:' set to 'Expert-Specific'.

The **Next Codes** button will open the **Next Global Codes** dialog, which can be used to assign next values of global project, invoice and PO code counters.

The **Prefix** field is used to enter a custom prefix to Global Invoice Codes.

The **Suffix** field is used to enter a custom ending to Global Invoice Codes.

The **Enable annual numbering resets** checkbox can be used to perform a switch from sequential invoice numbering to one which would start from invoice number 1 each new year. You can also set the exact date when the reset will happen.

 **Note:** This procedure is irreversible. After annual resets are enabled, they can not be disabled again.

The **Codes in naming of .RTF Files** drop-down lists can be used to select the code (global or client-specific) to be used as the default file name when saving invoices or POs for printing.

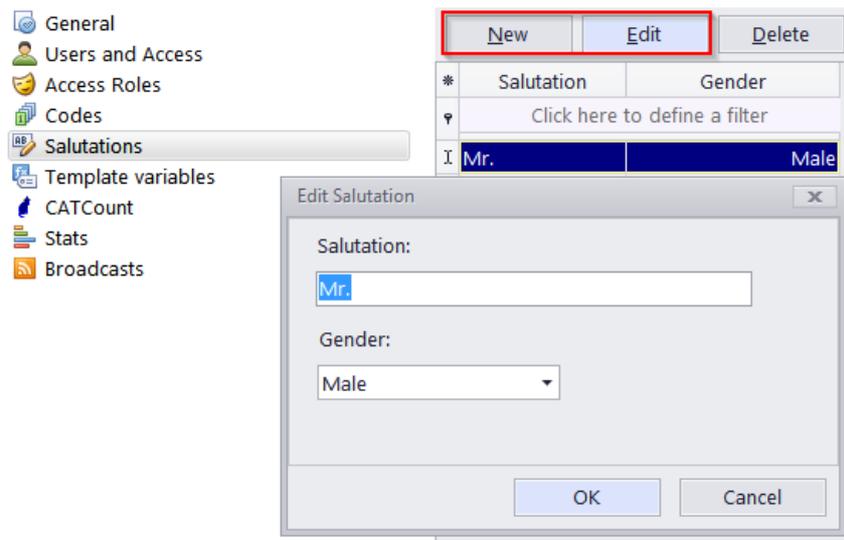
---

See also:

Administrator settings

# Salutations

Use the **Salutations** tab of the **Corporate Settings** window to create new or edit existing salutations if needed.

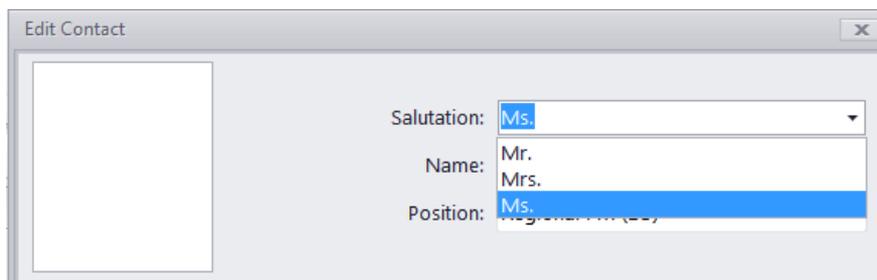


Double-click any salutation in the list to edit it.

Use the **New/Edit/Delete** buttons to create, modify or delete custom salutations.

Every salutation is associated with a gender: **Male**, **Female**, or **Undefined**.

These are the options which appear in the **Salutation** drop-down list when creating or editing contacts.



---

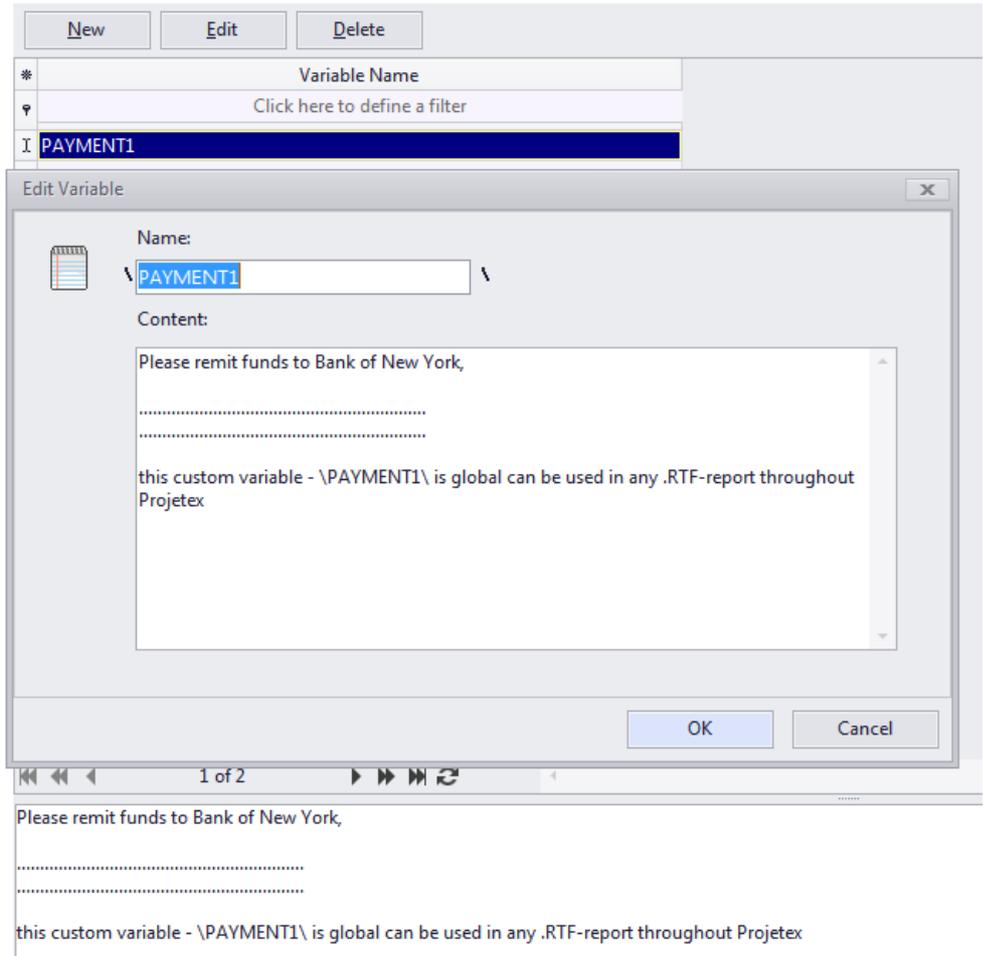
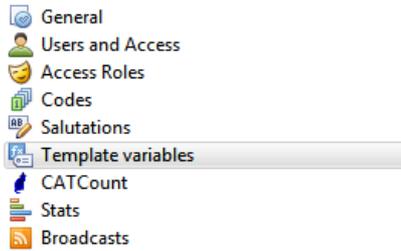
See also:

Administrator settings

Adding/Editing Contacts of Client/Prospect

# Template Variables

Global custom variables can be created here. These variables can then be used in document templates.



Double-click any custom variable in the list to edit it.

Use the **New/Edit/Delete** to create, modify or delete custom variables.

When you enter the name of a variable, bounded by backslashes, into a template, the content of the variable will be entered into any document generated from the template.

## Example:

If you enter *EMAIL* as the name of the variable and [info@marsonlymars.com](mailto:info@marsonlymars.com) as the content, you will be able to use the `{EMAIL}` variable inside all your .rtf templates.

If later the e-mail of your company changes to [info@venusforever.com](mailto:info@venusforever.com) you will not have to change it in all templates. You will only need to change the contents of the variable in Template Variables settings.

When adding custom variables to templates, be sure to enclose variable the name between two "backslash" symbols.

---

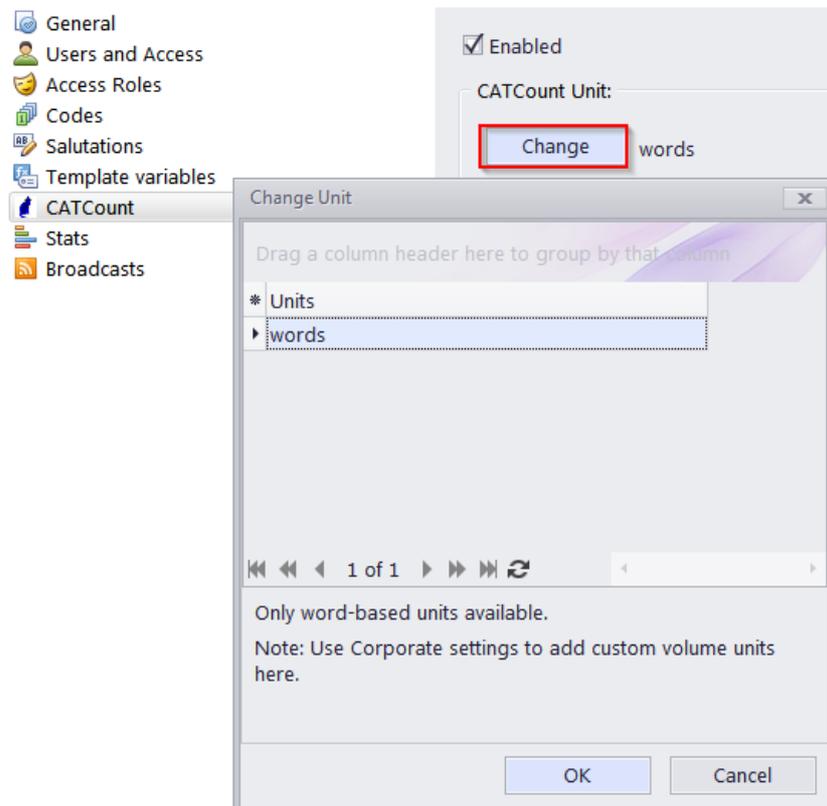
See also:

Administrator settings

Template Basics

# CATCount

This area contains a few controls for the CATCount tool used to calculate volumes of computer-assisted translation.



Select the **Enabled** check box to enable **CATCount** in the Projex Workstation.

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

When this feature is enabled, the **CATCount** button appears in **New Client Job (Edit Client Job)**, **New Corporate Job (Edit Corporate Job)**, **New Freelance Job (Edit Freelance Job)**, **New/Edit Client Quote**, and **New/Edit Freelance Quote** dialog windows of the Projex Workstation.

**Note:** The units displayed in this list can be edited in the **Volume Units** area of the **Corporate Settings** tab of Projex Workstation.

See also:

Administrator settings

CATCount in Projex

# Stats

This area contains settings for the graphical representation of a corporate expert's experience value (total volume of all jobs completed by the expert, converted into basic units).

Corporate Expert Experience Image

Show big  per each  words

Show small  per each  words

A corporate expert's experience is represented graphically by small and large stars, and you can enter the number of basic units that each star represents.

Be sure that the large star has a higher value than the small star.

The default values are 10000 basic units (words by default) for a small star and 100000 for a large star.

An expert's experience can be viewed in the **Stats** tab of the expert's Profile.

General Information **Stats** Levels

**Experience**

Volume (words):

**331650**

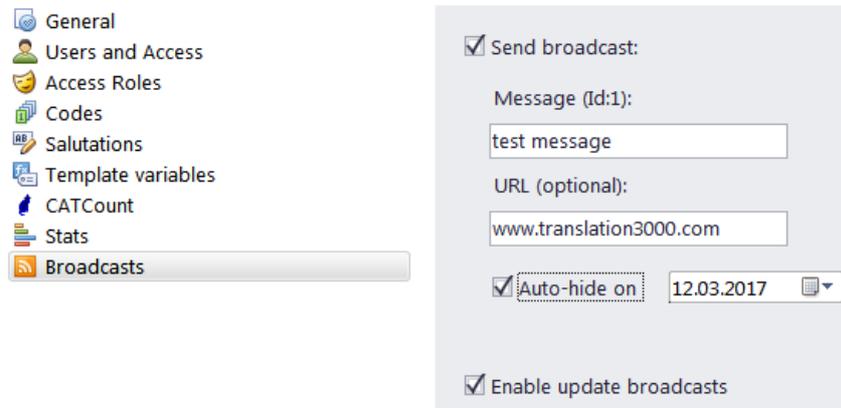

---

See also:

Administrator settings

# Broadcasts

The **Broadcasts** tab contains settings for sending short internal messages to all workstations.

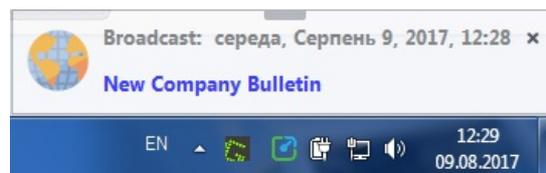


The screenshot shows the 'Broadcasts' settings panel. On the left is a navigation menu with the following items: General, Users and Access, Access Roles, Codes, Salutations, Template variables, CATCount, Stats, and Broadcasts (which is highlighted). The main panel contains the following settings:

- Send broadcast:
- Message (Id:1):
- URL (optional):
- Auto-hide on:  [calendar icon]
- Enable update broadcasts

To send a broadcast, check **Send Broadcast** and enter the message. You may optionally add a URL link to the message (then clicking the message will open the link in the default Internet browser) and set a date when the message will be turned off automatically.

The broadcast message will be displayed in the bottom-right corner of the screen for all users and will be closed once the user clicks either the URL link or the "close" button.



The message can be moved around and will be hidden automatically after 10 minutes, but will appear every time the user logs in until explicitly closed.

**Enable Update Broadcasts** will allow you to receive broadcasts from AIT about updates to our products.

---

See also:

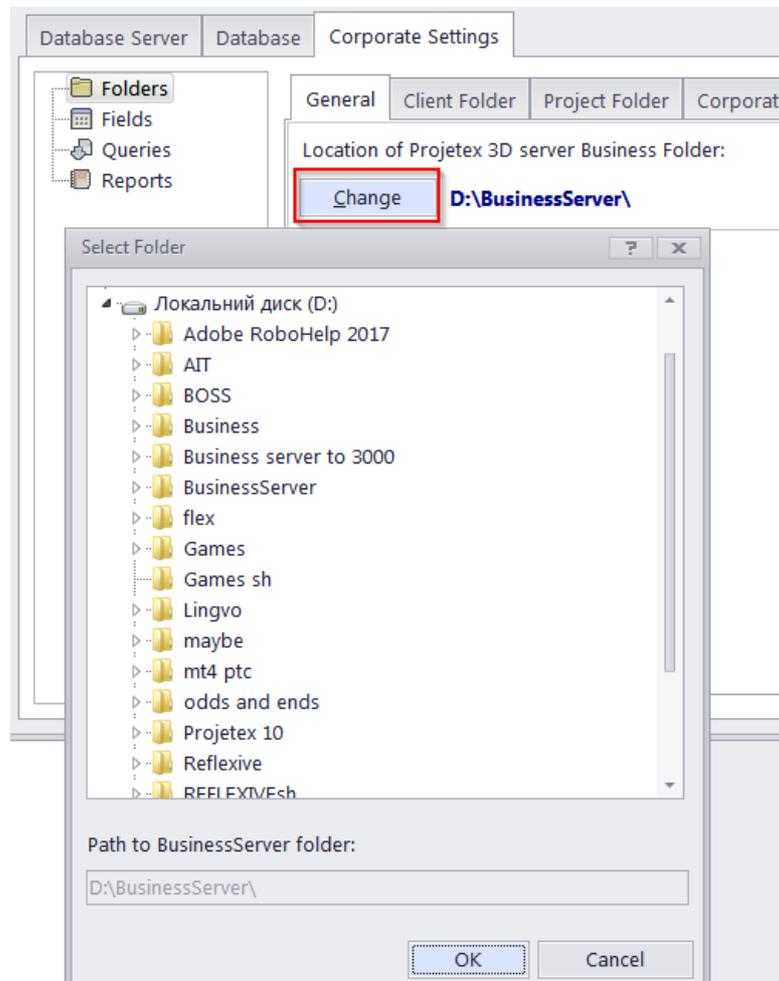
Administrator settings

# Folders

The location of *BusinessServer* folder, as well as automatic folder creation options can be changed on the **Folders** tab of the **Corporate Settings** tab in the Projotex Server Administrator.

## Business folder location

The **General** tab of the Folders section can be used to change The location of the *BusinessServer* folder. Client, project and expert folders are located inside the *Business* folder.

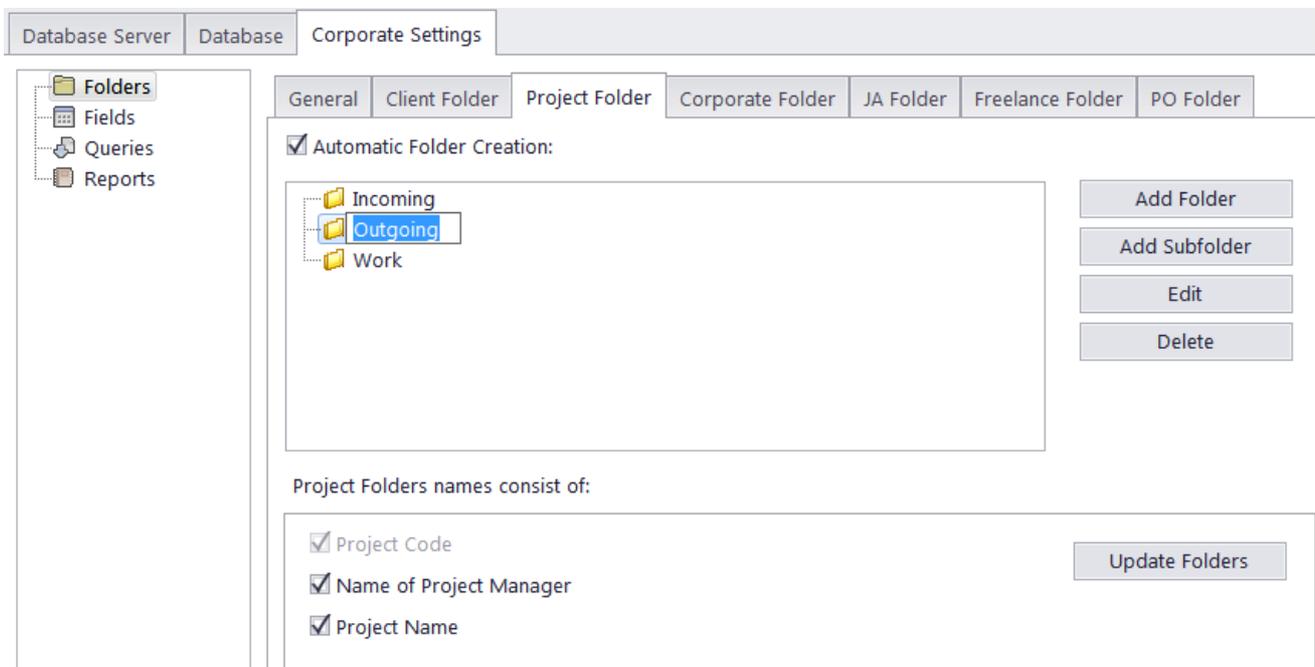


To change the default location, click the **Change** button and select new location on a local PC or in a network.

 **Note:** This will NOT move the contents of the current folder to the new location. They will need to be transferred manually.

## Folder settings

The other tabs of the **Folders** section represent different types of folders inside the *BusinessServer* folder.



Use the **Add Folder** and **Add Subfolder** buttons to add folders which will be automatically created inside of each new client, project, expert, JA and PO folder.

The **Project folder** tab also allows to configure the names of project folders.

## Automatic folder creation

With the help of the automatic folder creation feature, you can define a number of subfolders to be automatically created upon creation of a folder for each main entry type in Projotex (Client, Project, Corporate Expert, Freelancer, PO, JA). To enable this feature for a certain folder type, select the **Automatic Folder Creation** checkbox on the tab of required folder type.

Every time a **Client, Project, Expert, JA** or **PO** folder is created by the Projotex Workstation, any folders or subfolders added to the respective tab of the **Folders** settings will be created in that folder automatically

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

All changes for these custom folders will not be implemented for already existing folders.

## Project folder name

The way **Project folders** are named can also be customized to some extent. The name of each **Project folder** can consist of the following components:

*Project code (obligatory)*

*Project manager name*

*Project name*

You can enable or disable the inclusion of manager and project names into the folder name.

Click the **Update Folders** button to apply the settings to the names of all Project folders, created before. This feature is available only for project folder names and does not affect other folders.

---

See also:

Server Corporate Settings

Projotex Folder Structure

# Fields

Custom fields and their groups can be created and edited in this area.

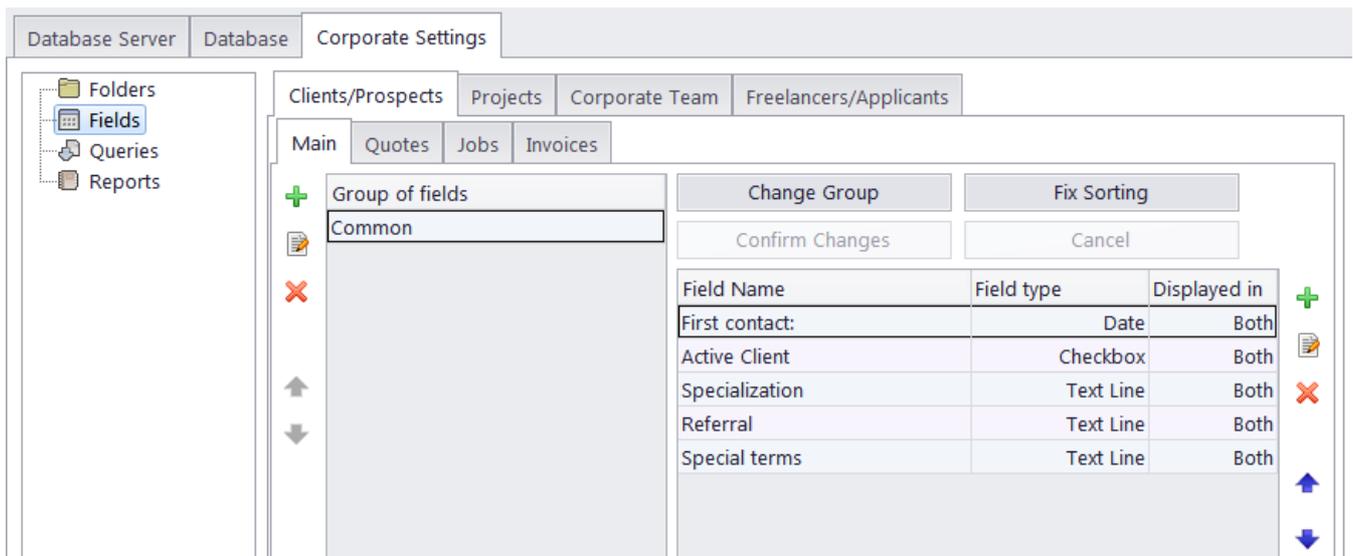
The **Clients**, **Projects**, **Corporate Team** and **Freelancers** tabs represent respective windows in the Projotex Workstation. The tabs below them represent specific areas in these windows where custom fields can be added.

**Note:** Any custom fields added to **Clients** by default also appear in **Prospects**. Likewise, custom fields added to **Freelancers** appear in **Applicants**.

Groups of custom fields can be managed with the buttons on the left-hand side.

Custom fields of each of the groups can be managed with the buttons on the right-hand side.

**Move Up** and **Move Down** buttons can be used to change the order in which custom fields and field groups are displayed in Projotex Workstation.



For detailed information regarding Custom Field processing see Database Customization.

See also:

Server Corporate Settings

# Queries

Custom queries can be created here. Queries can be used to extract and export data directly from the Projetex database without the use of a Projetex Workstation.

The screenshot shows the 'Corporate Settings' window in Projetex. The 'Queries' section is active, displaying a list of queries. The 'Client Jobs' query is selected. The description for this query is: 'Client Jobs Query. Uses links with Invoices, Projects, Services, Units, Currencies, Clients, Project Managers tables.'

Name
Client Jobs
Client Jobs (with Model)
Clients - Contacts
Clients - Invoices
Clients - Invoices (with Model)
Clients - Payments
Clients - Prices
Clients with custom fields (with Model)
Corporate Experts - JAs
Corporate Experts - Jobs
Corporate Experts with custom fields (with Model)
Custom Queries (with Model)
Custom Reports (with Model)

Description:

Client Jobs Query. Uses links with Invoices, Projects, Services, Units, Currencies, Clients, Project Managers tables.

Buttons on the right: New, Edit, Delete, Export Data, Print Data, Load, Save.

Double-click any of the queries in the list to open this query in the **Query Builder** window.

Use **New/Edit/Delete** to create, modify or delete custom queries.

Click **Export Data** to run the selected query and save the results in a TXT, CSV, HTML, RTF, XLS or PDF file.

Click **Print Data** to run the selected query and send the results directly to the printer.

Click **Load** to import a custom query from a PXQ file.

Click **Save** to export the selected query to a PXQ file.

---

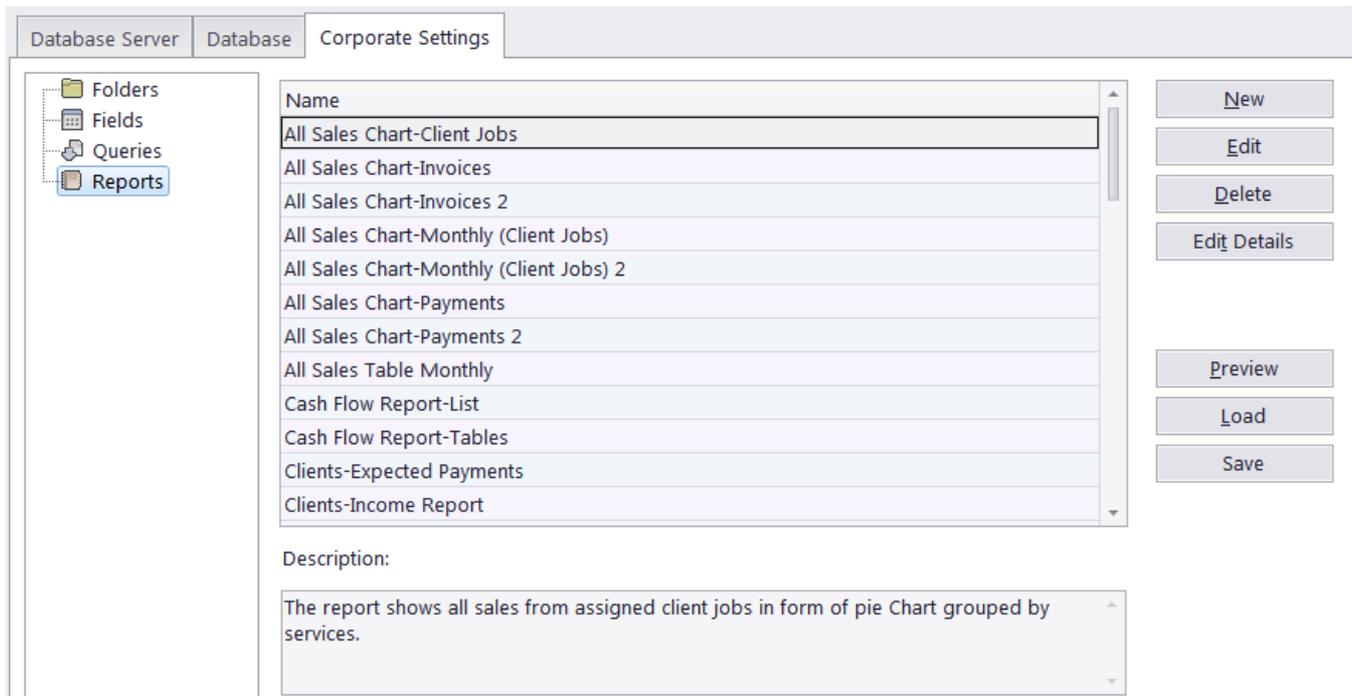
See also:

Server Corporate Settings

Custom Queries

# Reports

This area is intended for custom reports administration.



The following options are available for custom reports:

Use **New/Edit/Delete** to create, modify or delete custom reports.

Click **Edit Details** to open the **Edit Custom Report** window where a reports name and description can be changed.

Click **Preview** to run the currently selected report and view its results in a separate window.

Click **Load** to import a custom report from a PX15 file.

Click **Save** to export the currently selected report to a PX15 file.

**Note:** The custom reports displayed in the **Custom Reports** section of the Projetex Server Administrator are the ones currently integrated into the Projetex database. *PX15* files are used solely for export-import purposes, and deleting *PX15* file from *C:\Program Files\AIT\Projetex 3D\Projetex Server\Reports\* will not delete the corresponding report in the database.

See also:

Server Corporate Settings

Managing custom reports

# ODBC

The Projetex database can be accessed through ODBC.

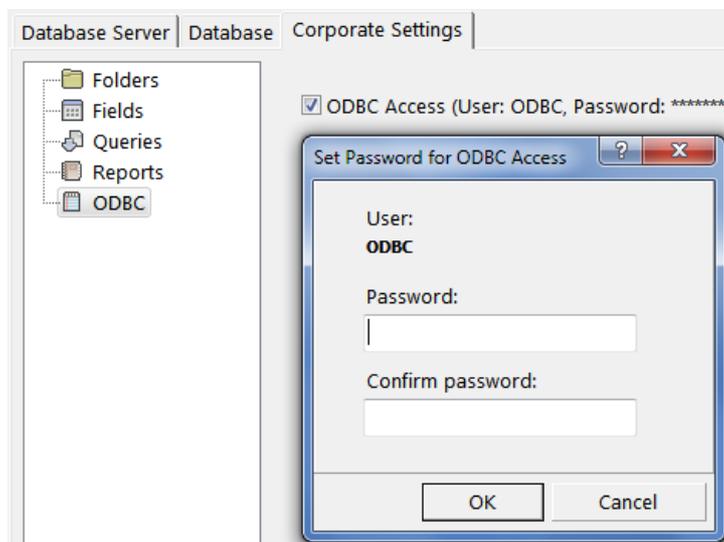
The ODBC (Open Database Connectivity) of the Microsoft Corporation represents a general interface for access to SQL-compatible databases. SQL is used as a standard mechanism for data access.

The interface ensures a high degree of interaction: one application can refer to different SQL-compatible DBMS (Data Base Management Systems) by means of generic code. This allows a developer to create and distribute "client/server" applications without taking into consideration the characteristics of a specific DBMS.

An ODBC driver is required to connect an application to any DBMS. Although ODBC is considered a good data transfer interface, it still has a number of restrictions as a program interface.

## Enabling ODBC access

To enable ODBC access, run Projetex Server Administrator and click the Corporate Settings tab. Then select **ODBC**. Select ODBC Access check box and set preferred ODBC password in the dialog which appears:



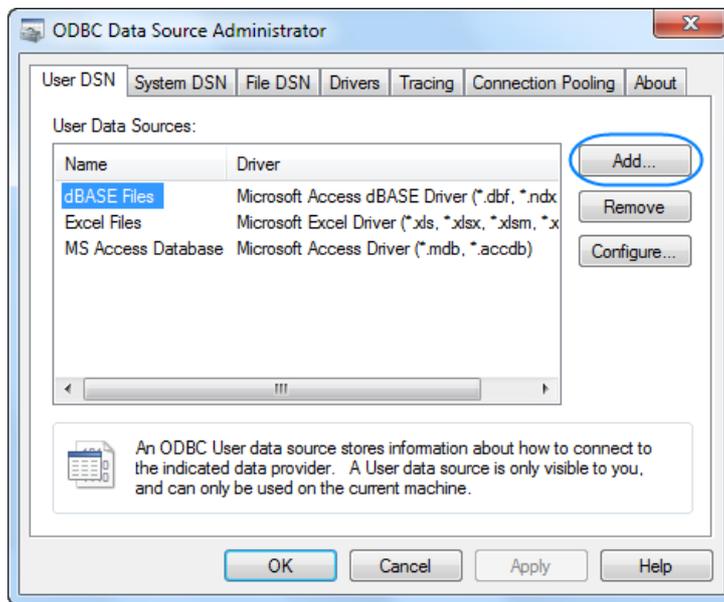
The ODBC login is "ODBC" and it is fixed.

Download the ODBC driver using the following URL: <https://www.microsoft.com/en-US/download/details.aspx?id=36434>

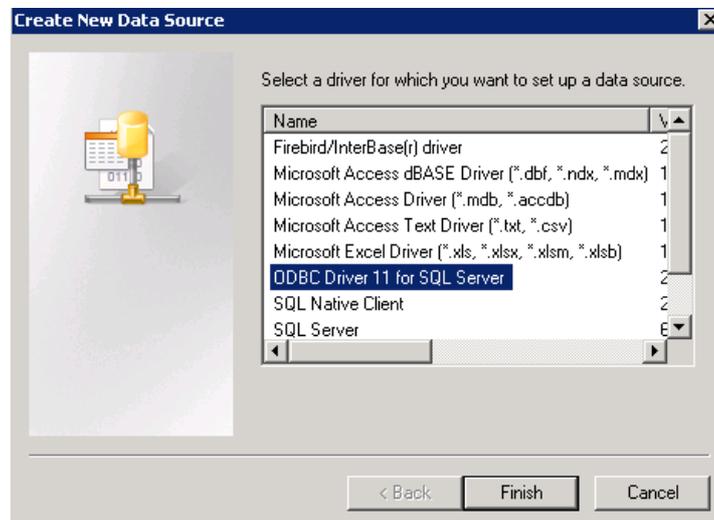
**NOTE:** downloading the ODBC driver is only required for Workstation machines. On server machines, the driver is included with the server installation.

After the ODBC driver is installed, go to Windows Control Panel > Administrative Tools > Data Sources (ODBC) to run the ODBC Data Source Administrator.

Click the **Add...** button in ODBC Data Source Administrator window.

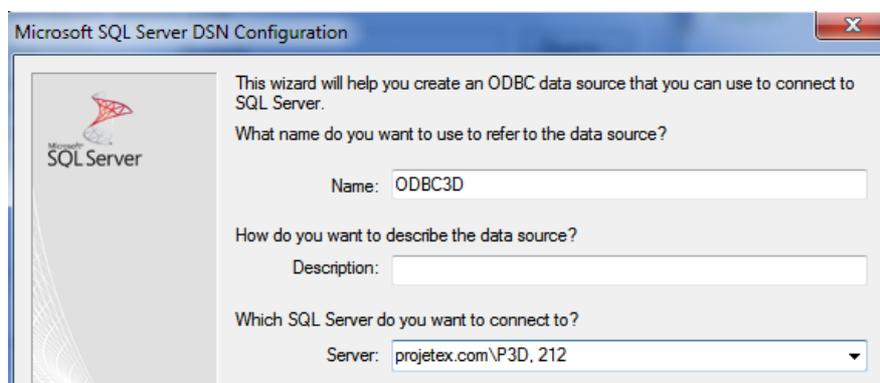


Select the newly downloaded driver for the Firebird.



Specify ODBC parameters in Create Data Source window:

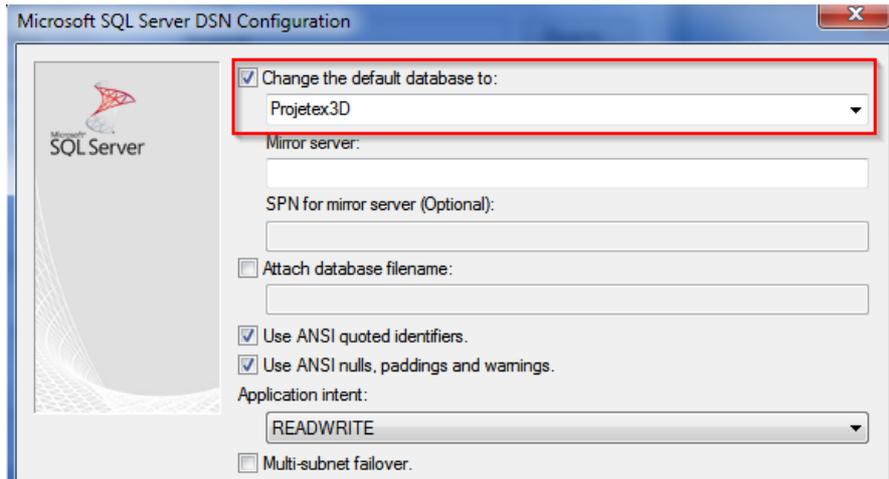
Enter the Server address in this format: %server domain address or IP%\P3D, 212



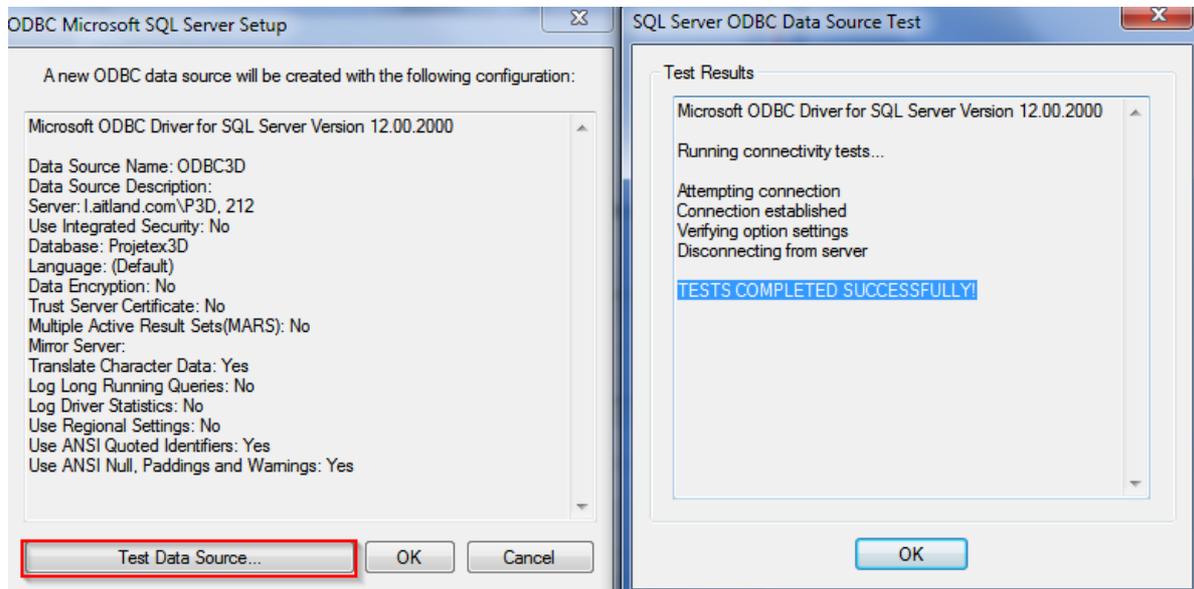
Select "SQL Server authentication" and enter the Login and password set in the System Administrator.



Enter "Projtex3D" as the new default database name.



Click Next, then Finish, and then **Test Data Source**. If the connection is configured correctly, you will see the message "TESTS COMPLETED SUCCESSFULLY!".



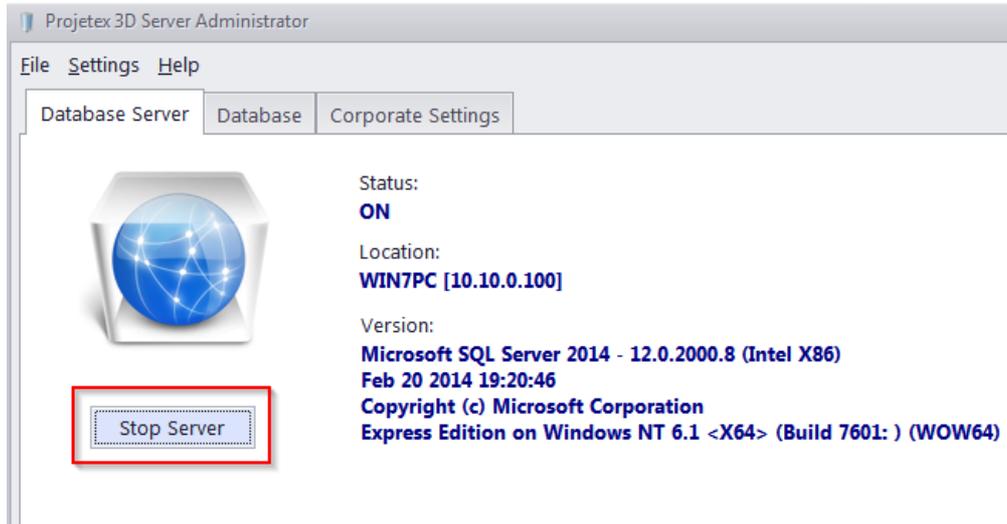
 Note: If database file has been replaced, run Projtex Server Administrator, the ODBC section, then clear and re-enable the ODBC Access check box. You will need to re-enter the password.

# Starting and Stopping the Database Server

*Microsoft SQL Database Server* is a database engine which should be up and running in order for the Projetex database to function. Though in some cases you may need to stop the *Microsoft SQL Server* temporarily.

You can start/stop the Microsoft SQL Database Server from the **Database Server** tab of the Projetex Server Administrator.

When Database Server is stopped, database operations are not accessible. No Projetex Workstations can connect to the database, and the set of Projetex System Administrator features is limited to the **Database Server** tab.



## Stopping the Server

The following procedures may require stopping Microsoft SQL Server.

1. *Manual backup.* When the Microsoft SQL Database Server is stopped, it is safe to copy the projetex3D.mdf database file to another location by means of Windows® Explorer. Resort to this kind of backup only in cases when regular the backup does not work for some reason. In all other cases, the regular Backup command does its job well, without need to switch the database into offline mode or stop the Database Server.
2. *Manual restore.* When the server is stopped, it is safe to place a projetex3D.mdf stopped-server backup file you have made before into its original location (C:\Program Files (x86)\Microsoft SQL Server\MSSQL12.P3D\MSSQL\DATA).
3. *Moving the current database* away before running a regular restore.
4. *Upgrading* the Microsoft SQL Database Server software. You will be notified when this upgrade would be recommended.

 **Note:** Stopping the Microsoft SQL Database Server is a critical operation, which can result in data loss if some users are connected to the server. Always switch the database into offline mode (it can be done from the **Database** tab of the Server Administrator) to ensure no Projetex Workstations are connected to the Database Server before running the **Stop Server** command.

 **Note:** It is not recommended to install newer versions of the Microsoft SQL Database Server unless there is an explicit recommendation to do this from Projetex Support. We will thoroughly test all future versions of Microsoft SQL, their proper functioning with Projetex Server and Workstation software, and will consider all pros and cons before recommending upgrades. Voluntary upgrades may cause unstable operation of Projetex.

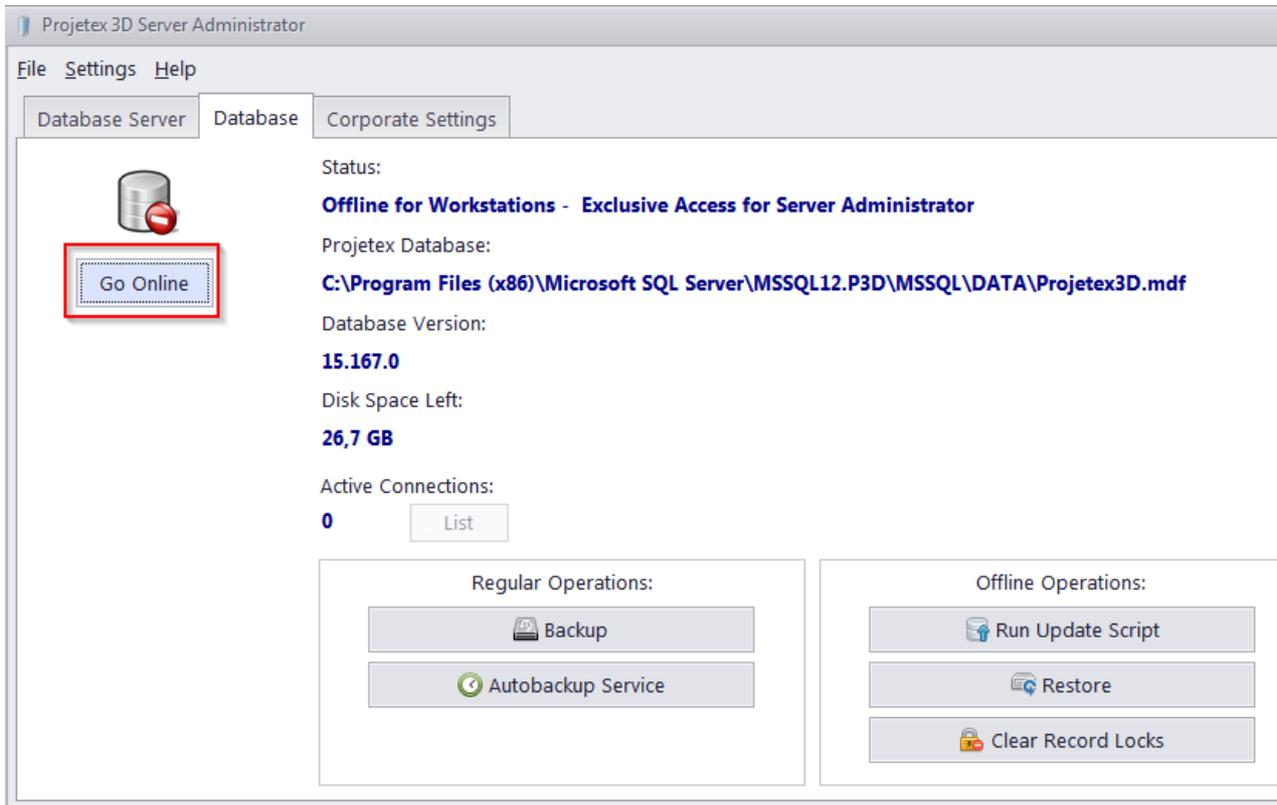
---

See also:

Database Server Tab

# Switching the database offline or online

To change the status of the database click the **Go Online** or **Go Offline** button (depending on the current status) on the **Database** tab of Projetex Server Administrator. Many server-level settings require the database to be in offline mode.



---

See also:

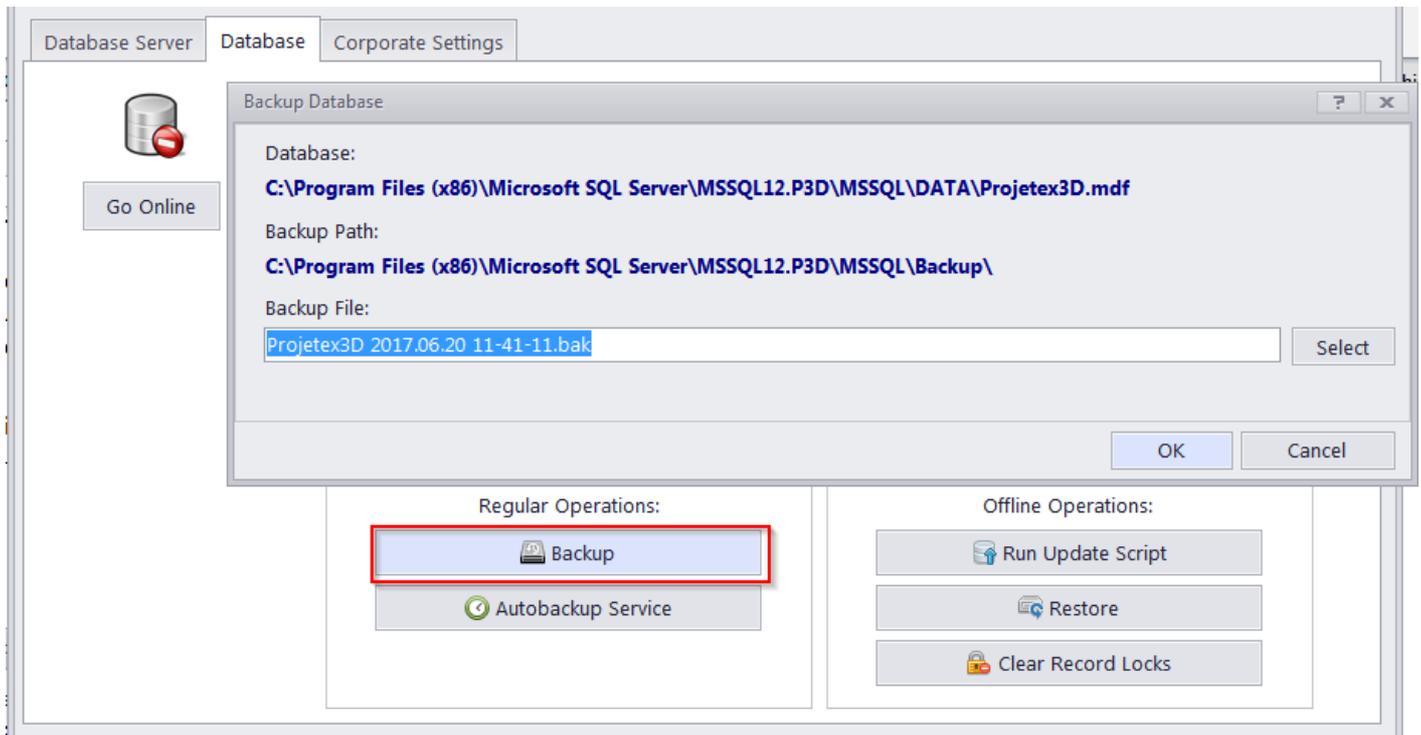
Database Tab

# Backup

It is recommended to perform regular backups of Projetex 3D database. You can perform backup of the database at any time by clicking **Backup** button on the **Database** tab of the Projetex 3D Server Administrator.

To perform a backup operation:

1. Click **Backup** button on the **Database** tab of Projetex Server Administrator.
2. Specify the location of backup file by clicking **Select** button.
3. Enter backup file name in the **Backup File** field.
4. Click **OK** button to begin backup operation.



See also:

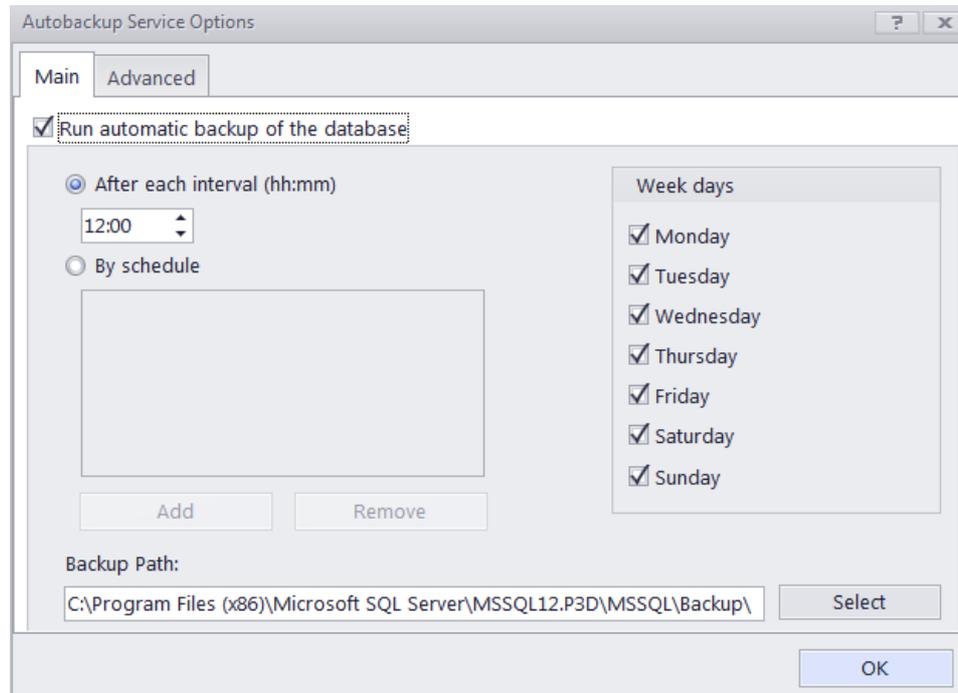
[Database Tab](#)

[Restore](#)

[Auto-backup Service](#)

# Auto-backup Service

The **Auto-backup** engine allows you to configure Projextex to back up the database automatically, according to a specific schedule.

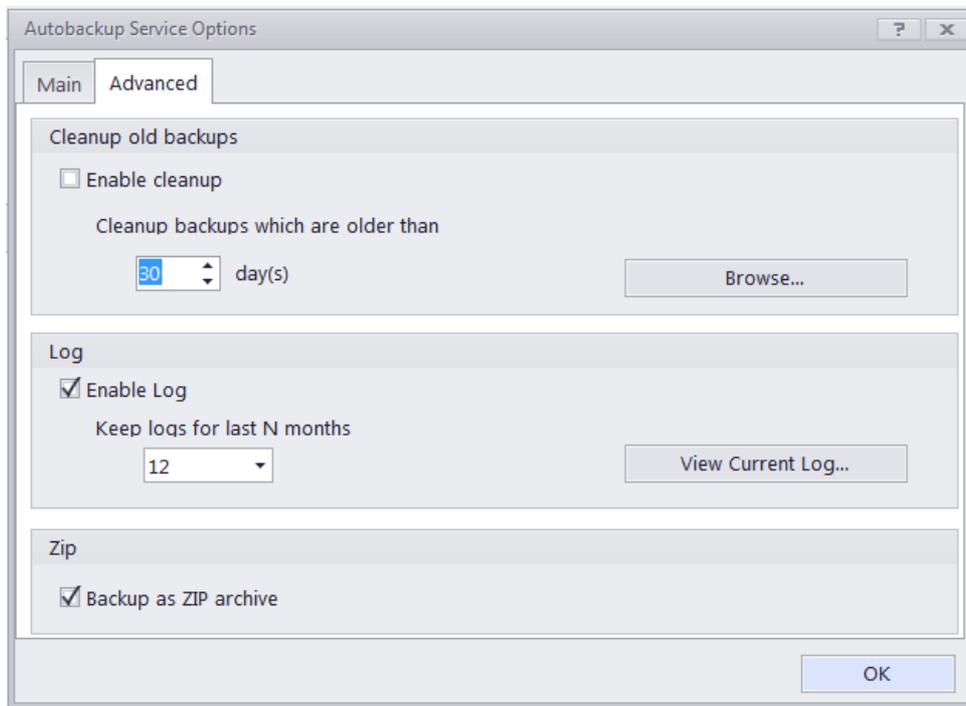


The **Main** tab of **Auto-backup Service Options** window contains the following options:

- **Run automatic backup of the database** - check to activate the auto-backup service.
- **After each interval (HH:MM)** - configures the interval between successive backups. Shortest interval is 15 minutes.
- **By schedule** - allows you to set the backup for a specific time. Use the **Add** and **Remove** buttons to create new time rule and delete the existing ones respectively.
- **Week days** block - select necessary days of the week for automatic backup. Disabled days override the interval and time settings.
- The path to save *auto-backup* files to can be changed by clicking the **Select** button to the right of current path and browsing for proper folder in the **Select directory** dialog.

The **Advanced** tab contains the following options:

- **Cleanup old backups** - to save on disk space, especially for very large databases, the system can periodically delete old backup files. Select **Enable cleanup** to switch this option on. Enter the number of days after which backup files will be considered outdated into the **Cleanup backups which are older than** field. Click **Browse** to open the current backup folder.
- The **Log** block contains setting for the auto-backup log, which records all automatic backup service operations. Select **Enable Log** to activate the log function. Use the **Keep logs for last N month** drop-down list to specify log storage time. Select 'always' to store logs indefinitely. Click the **View Current Log...** button to browse through the latest blog records.
- Select **Backup as ZIP archive** to make the service archive auto-backup files to save on storage space.



---

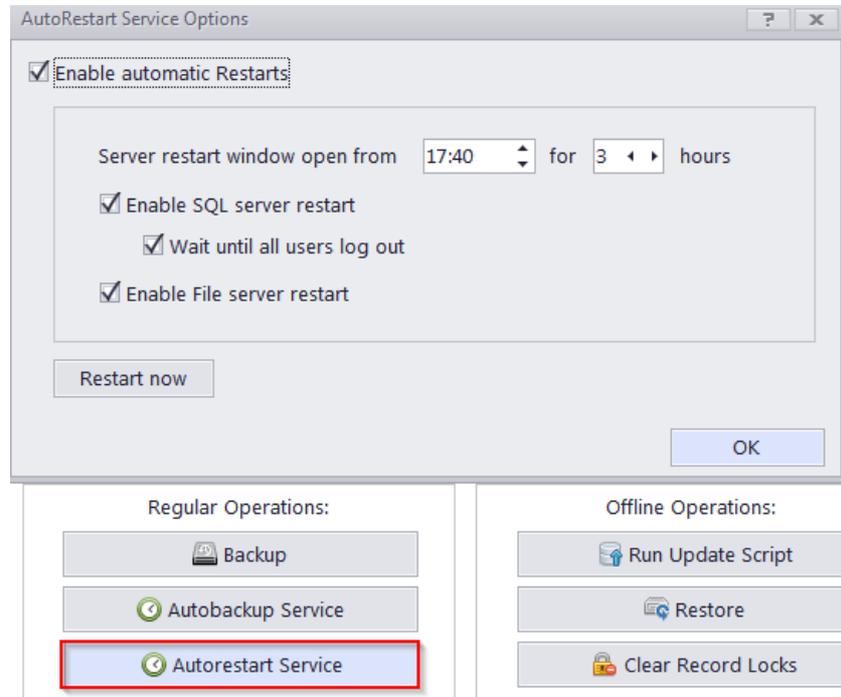
See also:

Database Tab

Restore

# Autorestart Service

The Autorestart service allows you to schedule automatic daily restarts of Projetex' SQL server and/or File server, to prevent or fix certain errors.



The Autorestart window contains the following options:

- The **Enable Automatic restarts** checkbox to enable/disable the service.
- The number fields to set up when the window to restart the servers will be open and how long it will remain open for.
- The checkboxes to individually enable/disable the SQL server and File Server restarts. By default, the restarts happen 1 minute after the restart window opens.
- The **Wait until all users log out** option postpones the SQL server restart until 1 minute after there are no workstation connected to the server, as long as the restart window is open.
- The **Restart Now** button will immediately restart the SQL and file servers.

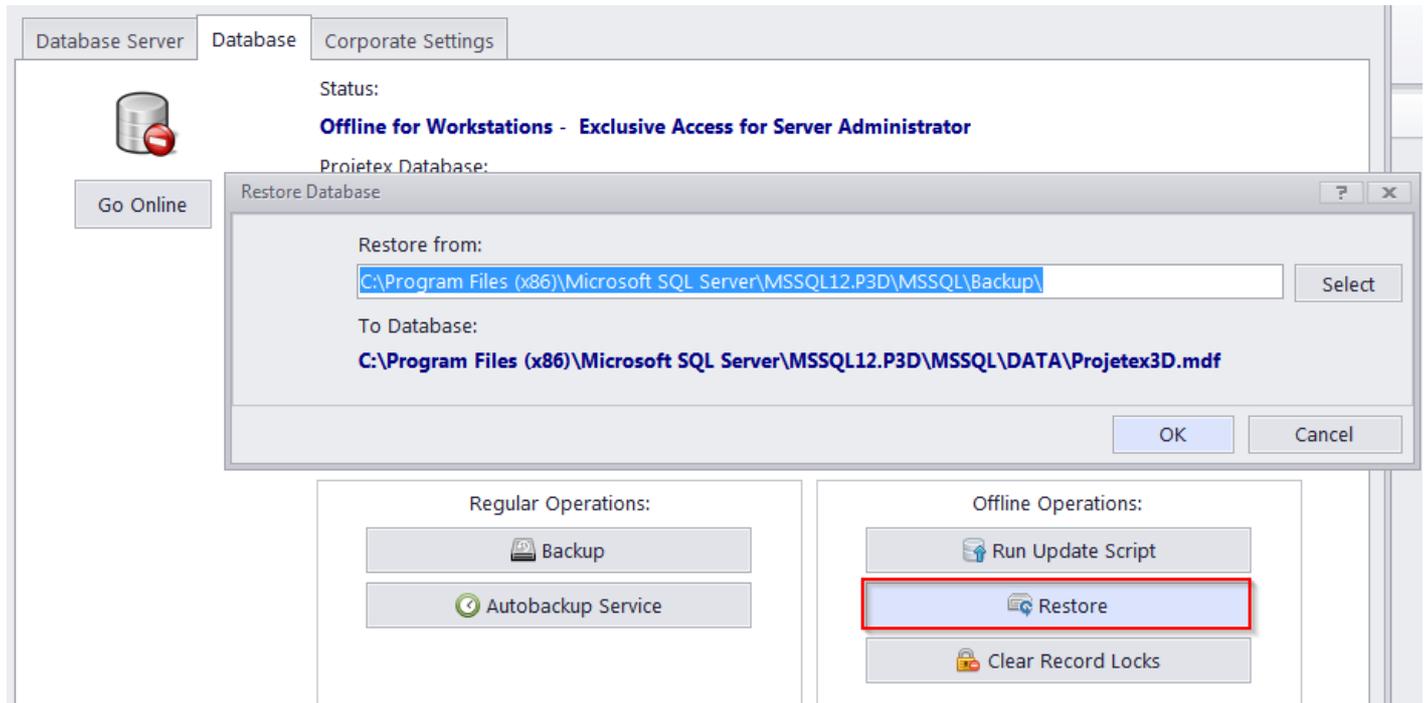
---

See also:

Database Tab

# Restore

The Restore function is meant to revert the database to the state saved in a backup file created earlier (by running the **Backup** command).



To restore your database from a backup file:

1. Turn your database offline by clicking the **Go offline** button.
2. Optionally, open your database folder (its address is displayed in the **Projetex Database** information string) and rename (or move to a different folder) your current *Projetex3D.MDF* file.
3. Click the **Restore** button on the **Database** tab of Projetex Server Administrator.
4. Click the **Select** button in the **Restore Database** dialog and locate required backup *.bak* file (by default these files are stored in *C:\Program Files (x86)\Microsoft SQL Server\MSSQL12.P3D\MSSQL\Backup\*) and click **OK** to begin the restore operation.

**Note:** Projetex 3D can also restore backups made in TO3000 3D, which is useful for upgrading from TO3000 to Projetex. After the restore, please switch to the Corporate Settings tab, and the program will prompt you to select the BusinessServer folder location, since TO3000 databases do not use the BusinessServer folder.

See also:

Database Tab

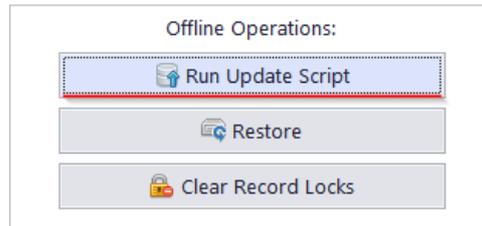
Backup

Auto-backup Service

# Run Update Script

In some cases, when you update your Projetex Server Administrator or Projetex Workstation, the database needs be updated as well. Usually the database version is automatically updated during Projetex Server setup, however there may be exceptions. In this case, database can still be updated manually by running a *database update script*.

Update scripts are always installed together with the Projetex Server Administrator and can be found in the *C:\Program Files\AIT\Projetex 3D\Projetex Server\DBUpdates\* folder in the form of *.PTU* files.



To update the database using a database update script:

1. Turn your database *offline* by clicking the **Go Offline** button.
2. Click the **Run Update Script** button from the **Database** tab of the Projetex Server Administrator.
3. Locate the script which updates your current database version to the next version. The current database version is displayed in the **Database Version:** string. Repeat the update operation until you have the most current database version.

## Example:

The installed database version is *8.91.0* and the software update requires version *8.93.0*. In this case you need to consecutively run two updates (first *dbx91to92.ptu* and then *dbx92to93.ptu*). Update files are not necessarily updating from the one number to the next.

 **Note:** The Projetex Server Administrator performs an automatic backup before each database update operation, for maximum security of data in case anything goes wrong during the update.

---

See also:

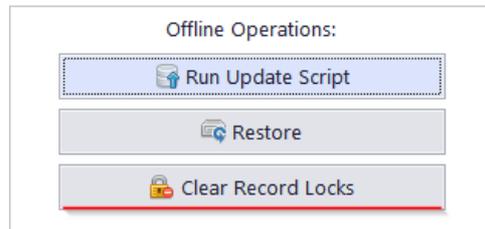
Database Tab

# Clear Record Locks

To preserve database integrity in cases when several users simultaneously try to access the same database record, Projetex locks the record when it is being edited and unlocks it when the edit window is closed.

If some technical problems occur the unlocking of the record may fail and this will render the record unavailable for all users.

In this case you can use the **Clear Record Locks** procedure to unlock the record.



To run the **Clear Record Locks** procedure:

1. Turn your database *offline* by clicking the **Go Offline** button.
2. Click the **Clear Record Locks** button from the **Database** tab of the Projetex Server Administrator.

 **Note:** Be sure to switch back to *Online* mode to make Projetex Server available for Projetex Workstations again.

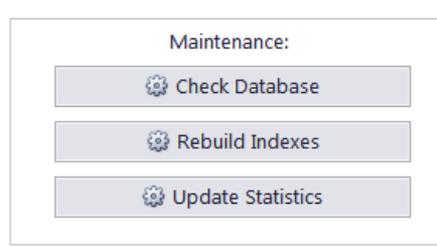
---

See also:

Database Tab

# Maintenance Operations

The Server Administrator utility can perform three maintenance operation on the SQL server.



- **Check Database** - checks the logical and physical integrity of all the objects in the database and reports if any errors are found.
- **Rebuild Indexes** - fixes any fragmentation of the database internal index
- **Update Statistics** - updates the internal statistics of the database to help it build more efficient queries.

Whenever the overall performance of the server drops, it is recommended to perform all three operations in order.

---

See also:

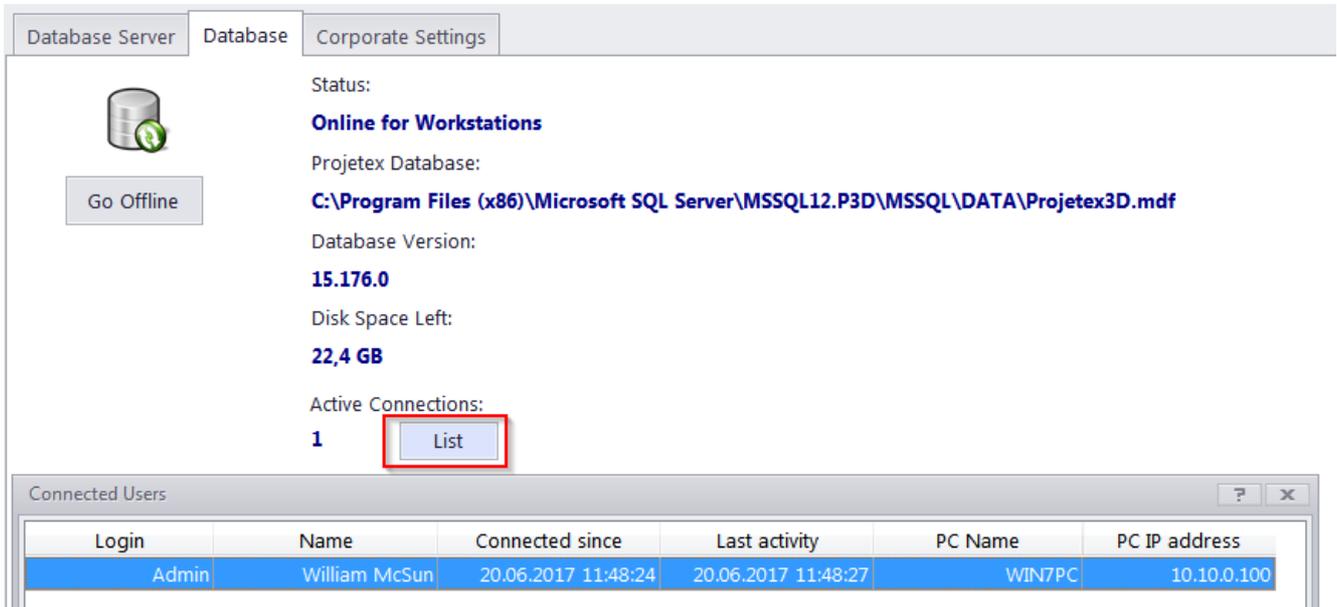
Database Tab

# View Online Users

Current Projetex Workstation connections can be viewed on the Database tab of Projetex Server Administrator. The total number of current connections is displayed in the **Active Connections:** information string.

To view connection details, click the **List** button on the **Database** tab of the Projetex Server Administrator.

This will open the **Connected users** window listing all currently logged in users.



The screenshot shows the 'Database' tab in the Projetex Server Administrator. The status is 'Online for Workstations'. The Projetex Database path is 'C:\Program Files (x86)\Microsoft SQL Server\MSSQL12.P3D\MSSQL\DATA\Projetex3D.mdf'. The Database Version is 15.176.0. The Disk Space Left is 22,4 GB. The Active Connections are 1, and a 'List' button is highlighted with a red box.

Database Server Database Corporate Settings

Status:  
**Online for Workstations**

Projetex Database:  
**C:\Program Files (x86)\Microsoft SQL Server\MSSQL12.P3D\MSSQL\DATA\Projetex3D.mdf**

Database Version:  
**15.176.0**

Disk Space Left:  
**22,4 GB**

Active Connections:  
**1** **List**

Go Offline

Connected Users

Login	Name	Connected since	Last activity	PC Name	PC IP address
Admin	William McSun	20.06.2017 11:48:24	20.06.2017 11:48:27	WIN7PC	10.10.0.100

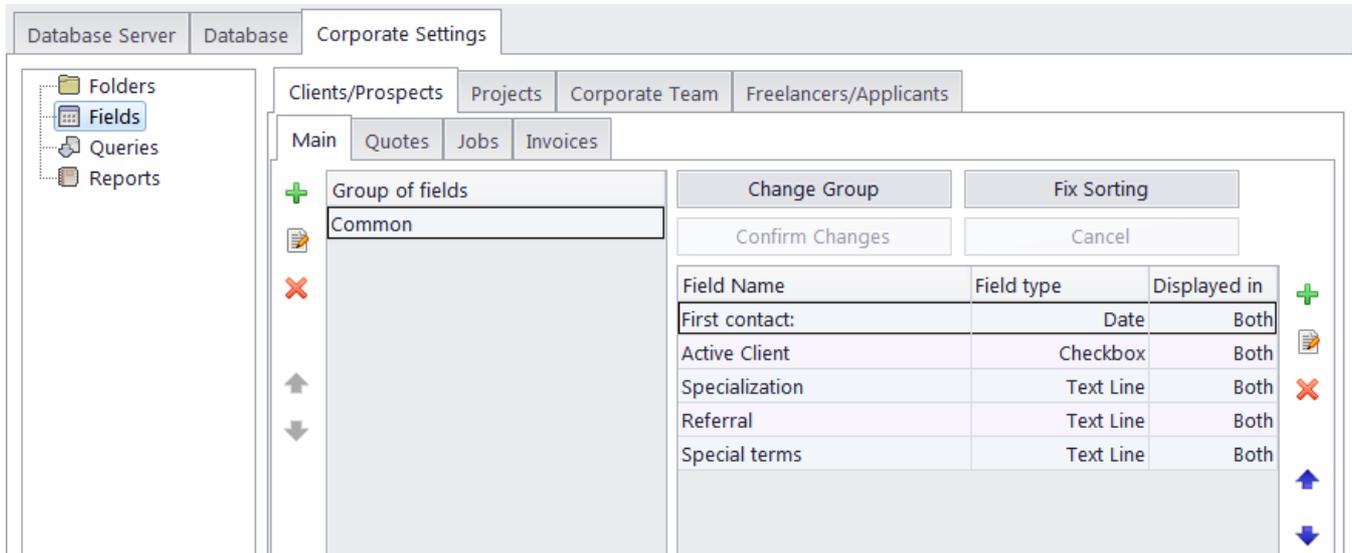
See also:

Database Tab

# Database Customization: Custom fields

Projetex supports database structure customization in the form of adding custom fields to certain tables in the database. Custom fields can be added via the **Fields** section in the *Server Administrator's Corporate Settings* tab.

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



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

*Custom fields* can be added to the following tables:

## 1. Clients (and Prospects):

- The **Main** tab of the **Client/Prospect** window (client/prospect profile)
- **Clients/Prospects: Quotes**
- **Client/Prospect Jobs**
- **Invoices**

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

## 3. Corporate Team:

- The **Main** tab of the **Corporate Expert** window (expert's profile)
- **Corporate Jobs**
- **Corporate Expenses**
- **JAs**

## 4. Freelancers (and Applicants):

- The **Main** tab of the **Freelancer/Applicant** window (freelancer's/applicant's profile)
- **Freelancer/Applicant Quotes**
- **Freelance/Applicant Jobs**
- **POs**

---

See also:

[Creating Groups of Custom Fields](#)

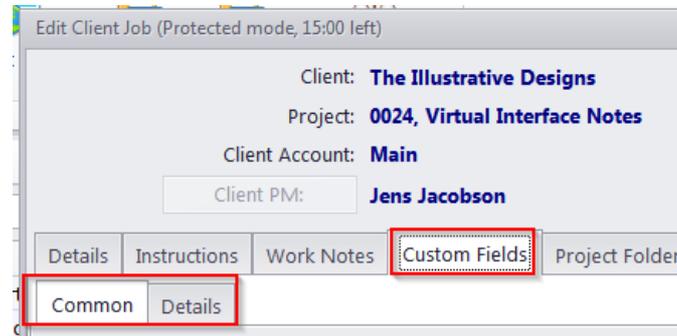
[Creating Custom Fields](#)

[Accessing Custom Fields](#)

# Creating Groups of Custom Fields

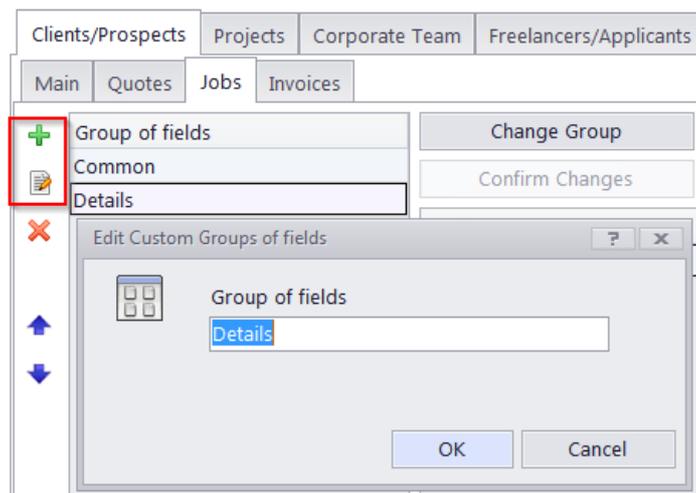
Each group of custom fields represents a separate tab in Projctex Workstation.

Example:



To create or modify a group of custom fields:

1. Run the Projctex Server Administrator and switch the database into Offline mode on the **Database** tab.
2. Switch to **Corporate Settings** tab and click Fields.
3. Select the area to which a new custom field group must be added.



4. Click the **New Group** button in the group of fields control buttons or double-click any group to edit its name.

**Note:** To delete a **Group of fields**, you need to delete all **Custom Fields** it contains, or move them to other groups first.

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

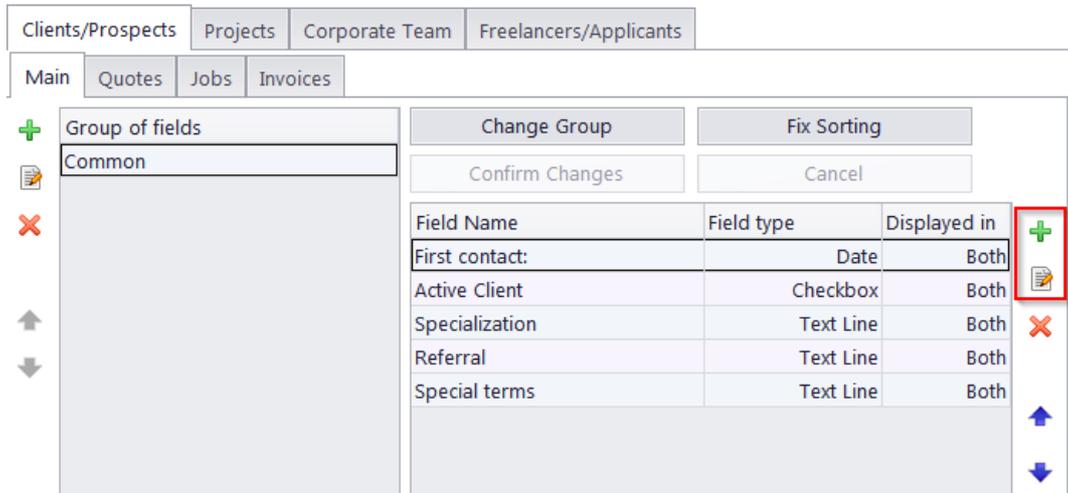
See also:

Database Customization: Custom fields

# Creating Custom Fields

Custom fields can be created on the **Corporate Settings** tab of the Projetex Server Administrator. To create or modify custom fields:

1. Run the Projetex Server Administrator and switch the database into Offline mode on the **Database** tab.
2. Switch to **Corporate Settings** tab and click Fields.
3. Select the required area tab (e.g. **Clients >> Main**)
4. Select a group of fields and click the **New Field** button.



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

- Enter the name of the new custom field in **Name** field.
- Select the data type of the new custom field from **Type** drop-down list and any additional options (depending on the type selected).
- Certain areas (such as the Main and Quotes tabs for Clients/prospects) have an additional drop-down menu, to choose which of the two tables a field should be displayed in.
- (Optional) Enter the variable name for this custom field; you will be able to use this variable in .RTF templates.
- Click **OK** to add the specified custom field or click **Cancel** to discard.

## Example:

To create a custom field that will look like a drop-down list, select **Text line** as the data type, and then check the **Has fixed list of values** check box. Enter the options for that check box in the field that appears:

New Custom Field

Name: Drop-down list

Displayed in: Both

Type: Text Line

Variable: \

has fixed list of values:

- Option 1
- Option 2
- Option 3

OK Cancel

To move the custom fields to another **Group of fields**, i.e. another tab, click the **Change Group** button, select the target group, and click OK.

If the list displays incorrect results after moving fields or groups around, click **Fix Sorting**.

To change the order of custom fields, use the **Move Up Field/Move Down Field** buttons.

To confirm changes to custom field settings, click the **Confirm Changes** button.

 **Note:** If you leave the **Custom Fields** settings without clicking this button, Projetex will ask you whether the changes should be saved.

---

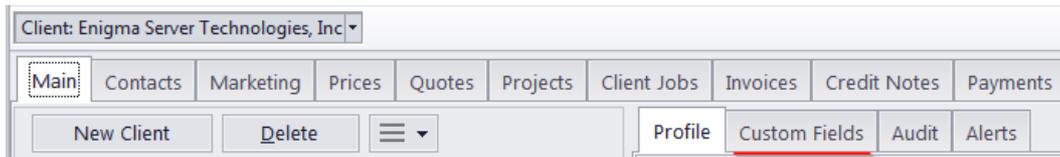
See also:

Database Customization: Custom fields

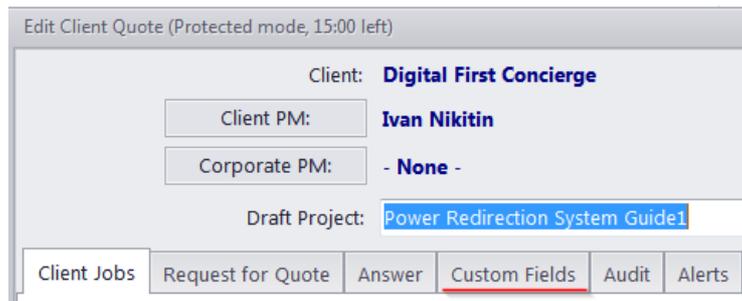
# Accessing Custom Fields

Custom fields can be accessed on the **Custom Fields** tab within many areas in Projextex Workstation.

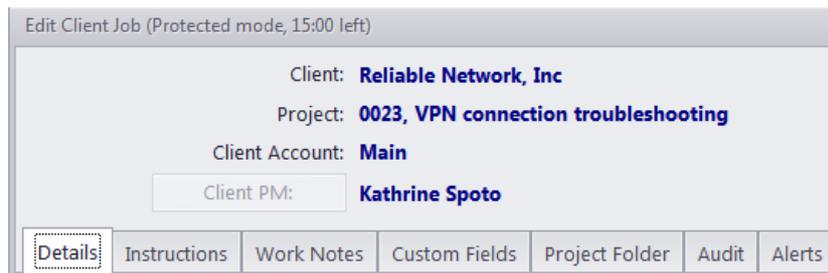
Fields created under the **Clients/Prospects >> Main** can be accessed on the **Main** tab of the **Client/Prospect** window.



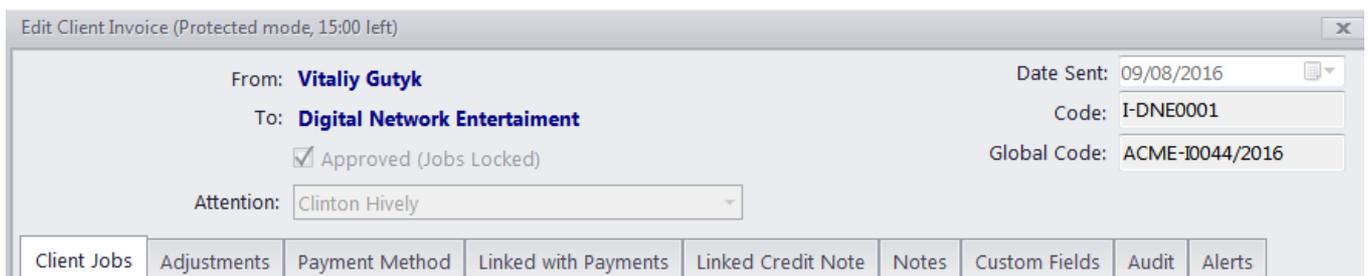
Fields created under **Clients/Prospects >> Quotes** can be accessed in the **Edit Client/Prospect Quote** window.



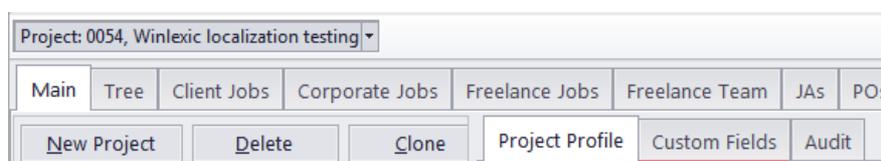
Fields created under **Clients/Prospects >> Jobs** can be accessed in the **Edit Client/Prospect Job** window.



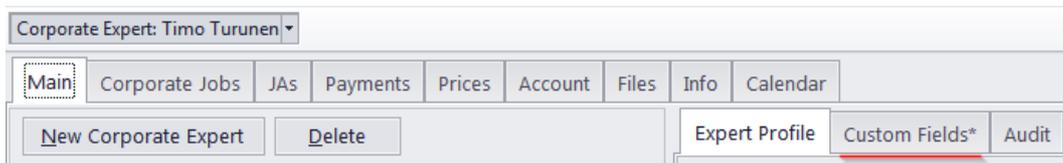
Fields created under **Clients/Prospects >> Invoices** can be accessed in the **Edit Invoice** window.



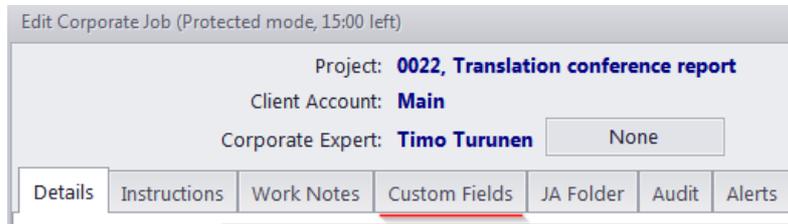
Fields created under **Projects** can be accessed in the **Main** tab of the **Project** window.



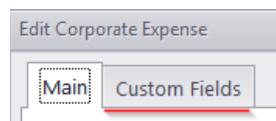
Fields created under **Corporate Team >> Main** can be accessed in the **Main** tab of the **Corporate Expert** window.



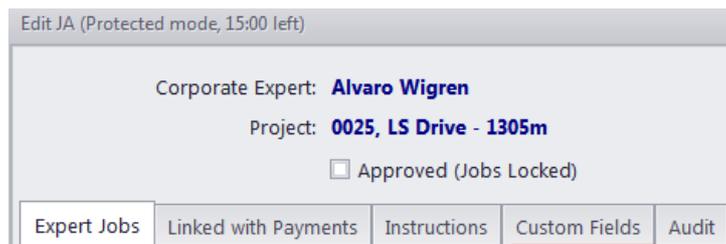
Fields created under **Corporate Team >> Jobs** can be accessed in the **Edit Corporate Job** window.



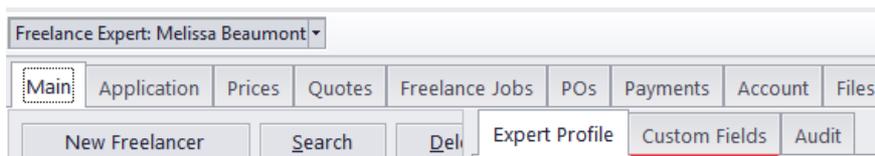
Fields created under **Corporate Team >> Corporate Expenses** can be accessed in the **Edit Corporate Expense** window.



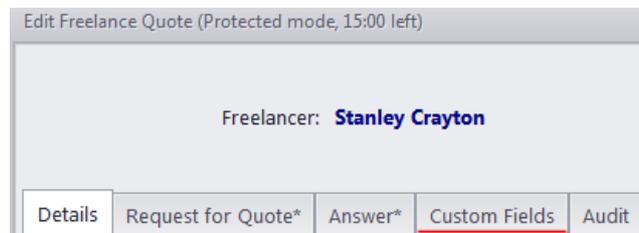
Fields created under **Corporate Team >> JAs** can be accessed in the **Edit JA** window.



Fields created under **Freelancers/Applicants >> Mains** can be accessed in the **Main** tab of the **Freelancer/Applicant** window.



Fields created under **Freelancers/Applicants >> Quotes** can be accessed in the **Edit Freelancer/Applicant Quote** window.



Fields created under **Freelancers/Applicants >> Jobs** can be accessed in the **Edit Freelance/Applicant Job** window.

Edit Freelance Job (Protected mode, 15:00 left)

Project: **0025, LS Drive - 1305m**

Client Account: **Main**

Freelancer: **Jose Fernandez**

Details Instructions Work Notes Custom Fields Audit Alerts

Fields created under **Freelancers/Applicants >> PO** can be accessed in the **Edit PO** window.

Edit PO (Protected mode, 15:00 left)

From: **Vitaliy Gutyk**

To: **Jose Fernandez**

Project: **0040, Localization www.fuunre.com**

Project Manager: **William McSun**

Approved (Jobs Locked)

Freelance Jobs Adjustment Linked with Payments Notes Custom Fields Audit Alerts

---

See also:

Database Customization: Custom fields

# Projetex Folder Structure

Projetex automatically creates and maintains a folder structure designed to streamline storage, linking and sharing your work files. All workflow files (such as *client-sent files* and *files to be sent to clients*, as well as template-based documents like *invoices*, *job assignments*, *purchase orders* and *quotes*) are stored in subfolders of the *BusinessServer folder*, a centralized, unified folder, accessible by each team member within necessary limits, mirrored by the local Business folders on Workstation computers.

The main purpose of the *BusinessServer folder* is to be a central storage location for client, project, and expert folders (these folder types are described below). By default it is created in the root of drive *C:\* of the Projetex Server host machine.

The location of BusinessServer folder can be changed on the **Folders** tab of the Server Administrator's **Corporate Settings** window. Having changed the BusinessServer folder's location you must move the content from the old BusinessServer folder manually.

## Different folder types

The *BusinessServer* folder contains nine folders: *Clients*, *Projects*, *Experts*, *Prospects*, *KB*, *Public*, *Output*, *Templates* and *Versions*.

The *Experts* folder consists of three subfolders: *Corporate*, *Freelance* and *Applicant*. The *Corporate* folder stores corporate expert files; the *Freelance* folder — freelance experts files; the *Applicant* folder — applicant and former expert files.

Clients folders (a separate folder for each client) are stored in the *Business\Clients\* folder. Each folder is named with a unique Client Code.

Prospect folders (a separate folder for each prospective or former client) are stored in *Business\prospects\* folder. Each folder is named with a unique Prospect Code.

Experts folders (a separate folder is created for each expert) are stored in *Business\Experts\Corporate*, *Business\Experts\Freelance* and *Business\Experts\Applicant* folders.

Project folders (a separate folder is created for each project) are stored in the *Business\Project* folder. Each folder name contains a unique *project code*. A project folder's name can also contain the project name and project manager name.

The KB folder contains the folders of the knowledgebases created in Projetex.

The Public folder contains files that are accessible to all users.

The Output folder contains exported general Price lists.

The Templates folder is the storage of templates used for issuing quotes, invoices, payments etc.

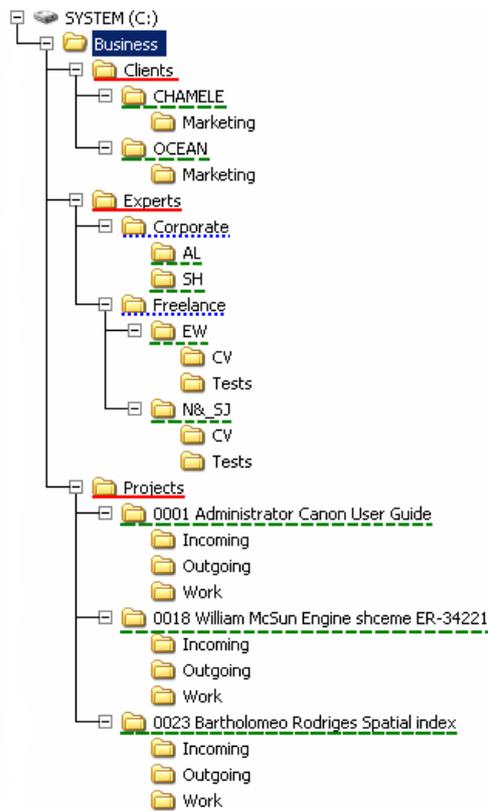
The Versions folder contains all versions of files, which have ever been modified on the Server.

These folders, as well as their subfolders are created automatically when a Projetex Workstation user clicks the **Folder** button in the respective areas of the program (like the **Main** tab of **Project** window) or other wise activates the File manger interface.

Projetex can also automatically create such folders when needed (for example an *Expert* folder is automatically created upon this expert's login).

### Example:

Sample structure of folders in Projetex



## Client/Prospect Folders

A client/prospect folder is a storage location for all files relevant to a particular client. This folder is created through the **Main** and **Files** tabs of the **Client** window. The following subfolders are created automatically in the *Client* folder, depending on the document being saved: Prices, Jobs, Quotes, Invoices and Payments.

Each client folder can contain custom subfolders, which will be created automatically along with the client folder. These subfolders can be specified on the **Folders** tab of the **Server Administrator Corporate Settings**.

## Expert Folders (Corporate, Freelance, Applicant)

An Expert folder is a storage location for all files relevant to a particular expert. It can be created from the **Main** and **Files** tabs of the **Corporate Expert**, **Freelance Expert** or **Applicant** windows. The following subfolders are created automatically in Expert folders, depending on the document being saved:

In *Corporate Expert's* folder: JAs, Corporate Jobs.

In *Freelance Expert's/Applicant's* folder: Quotes, Prices, POs, Payments.

**Note:** When a PO/JA is saved using an RTF template, the file is stored in a separate folder (it's name will contain the PO/JA Code) and the link to this file is saved in the POs/JAs sub-folder of the expert's folder.

Each expert's folder can contain custom subfolders which will be created automatically along with an expert folder. These subfolders can be specified on the **Folders** tab of the **Server Administrator Corporate Settings**.

## Project Folders

A *Project* folder is a storage location for all files relevant to a particular **Project**. It can be created from the **Main** and **Files** tabs of the **Client** window. It is created automatically when any project-related document is saved.

Each project's folder can contain custom subfolders which will be created automatically along with a project folder. These subfolders can be specified on the **Folders** tab of **Server Administrator Corporate Settings**. By default, this includes three folders: Incoming (files received from the client, e. g. text to be translated), Work (files currently being written or processed) and Outgoing (completed work to be sent to the client).

For consistency purposes, the name of the project folder is the same as project's code (the default value) and cannot be modified manually. Name of the project folder can also include additional elements.

---

See also:

File Sharing and Synchronization

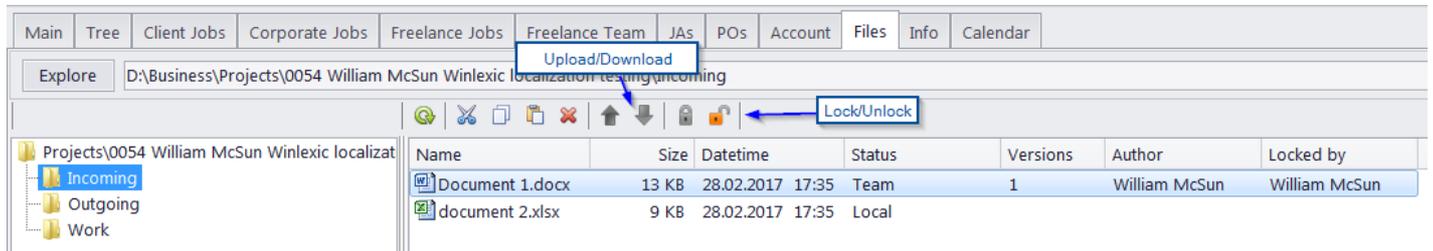
Working with files in Projetex

# File Sharing and Synchronization

Projetex uses its own file sharing and synchronization system, which does not require configuring any additional folder sharing settings on your server PC. All files stored in the *BusinessServer* folder can be downloaded, updated and uploaded between the server and workstations.

Projetex Workstations automatically create local copies of files and folders stored in *BusinessServer* folder on the server machine. All local files and folders are contained in the *Business* folder on the Workstation machine.

**Note:** All users running a Projetex Workstation on the same PC have one common local repository folder and work with the same local files.



## File statuses and operations with files

When a user opens a file, he or she in fact opens a downloaded copy of the file, stored in their *Business* folder. To update this file on the server, the user will need to upload this file to the server by right-clicking the file and then clicking **Upload** on the drop-down context menu, or clicking the **Upload** button on the toolbar above the files list.

Each file or folder can have one of the following statuses:

**Team** - the files stored in the *Business* folder on server and in local storage are identical.

**Team - Changed on Workstation** - the local copy of the file has been modified, the file on the server has not been updated.

**Team - Changed on Server** - the file on the server has been modified, the local copy has not been updated.

**Team - Missing** - the file exists on the server, but has not been downloaded to a local PC yet (or has been deleted locally).

**Local** - the file exists locally, but has not been uploaded to the server yet (or has been deleted on server).

## Locking files

When a file exists on the server (i.e. its status is **Team**, **Team - Changed on Workstation**, **Team - Changed on Server** or **Team - Missing**), it can be locked with the **Lock** button. In this case only the user who locked the file will be able to alter it on the server. Other users will be able to *download* the locked file but not *upload* any new versions. Thus the user who is working with this file can be sure that the file will not be replaced on the server by other users until the work is complete.

If a user forgets to unlock their locked files after working on them, but another user needs to work with the same files, he or she can right-click on the locked file and select the **Break Lock** option. Then files will be unlocked and can now be locked by another user. **Break Lock** does not affect files locked by the current user. Use the **Unlock** button to unlock such files.

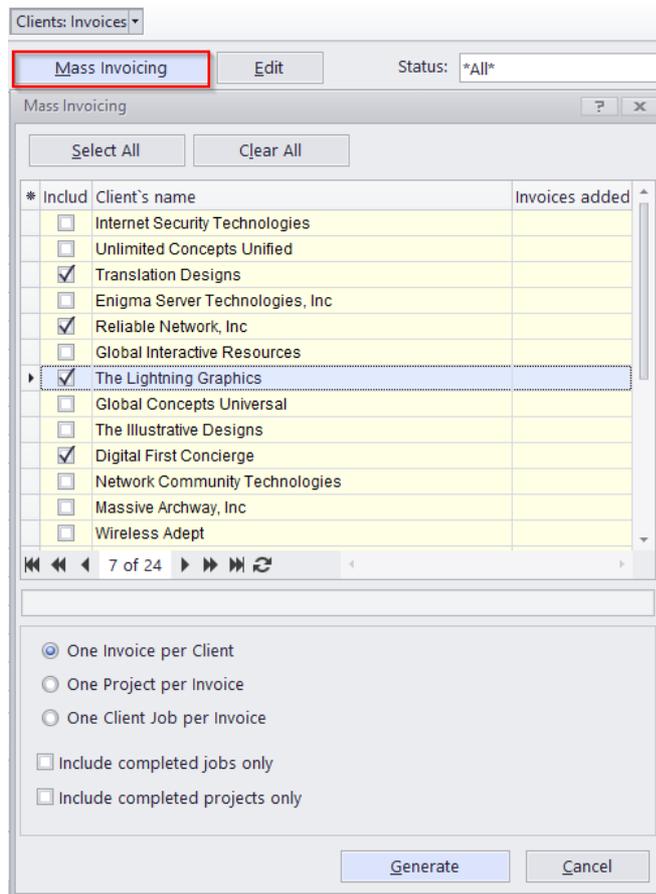
These operations can be performed on the **Files** tabs of the **Client**, **Prospect**, **Project**, **Corporate Expert**, **Applicant**, and **Freelancer** windows. The list of files these tabs display includes both the local files and the files existing on the server.

**Note:** It is advisable to lock file every time when you work with it, because in this case all users will be able to see that someone is working with the file. Thus you will not get a situation when several users work with the same file and then upload changes on server. Only your changes will be accepted by server.

**Note:** Please use the **Break Lock** function only if you are sure that the file is not being worked on by another user.

## Quick upload and unlock

In the upper-right corner of the window you will see a drop-down menu labelled "Team".



Clicking it will reveal two options:

**Upload Changes** - any work files that are both locked by the current user and have the status **Local** or **Team - Changed on Workstation** are immediately uploaded to the server.

**Clear Locks** - unlocks all files locked by the current user.

---

See also:

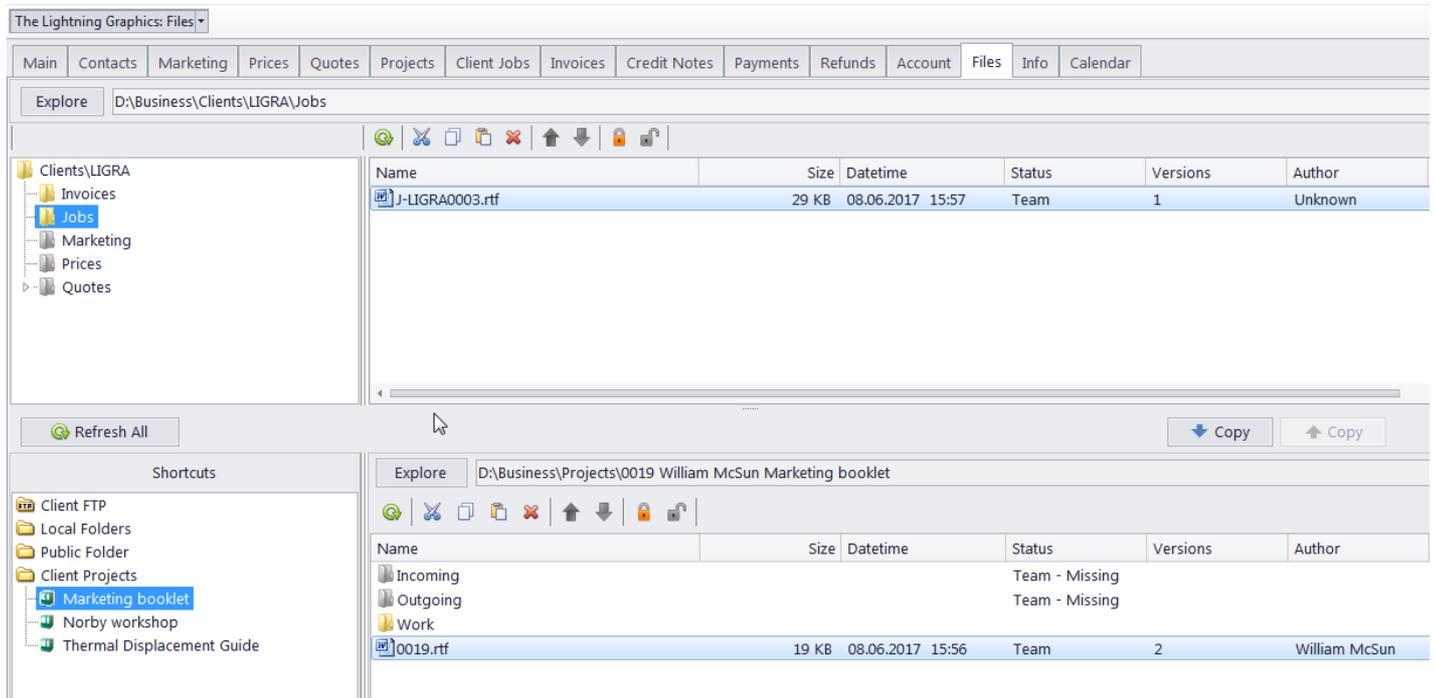
Projotex Folder Structure

Working with files in Projotex

# Working with files in Projetex

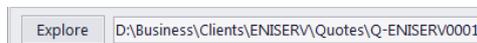
Files of any particular client, project, or expert can be viewed in the **Files** tab, available in each **Client**, **Project** and **Expert** window in Projetex.

Folders are opened in Projetex' built-in file manager. The interface of the Projetex file manager is very much like the interface of Windows Explorer with some additional options to enhance the management of your workflow files. This includes related folders and FTP access.



The **Explore** button: click this button to open the currently viewed folder in the Windows Explorer window.

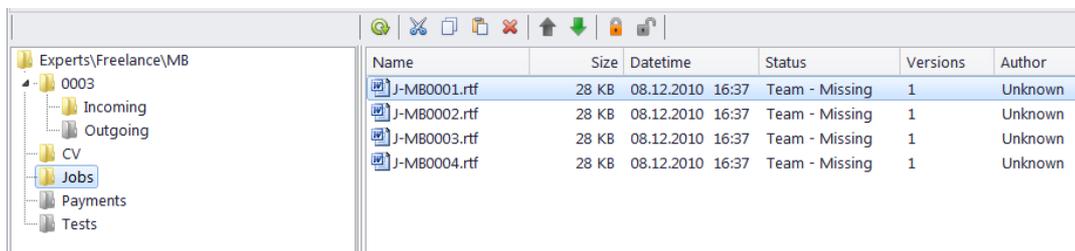
The address bar displays the path to the currently opened folder.



The **Common file options** buttons can be used to perform standard operations with selected files and folders: **Refresh**, **Cut**, **Copy**, **Paste**, **Delete**, **Upload**, **Download**, **Lock**, **Unlock**.

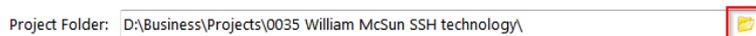


The structure of the specified folder is displayed as a *folder structure tree* to the left. Click any of these folders to view its contents in the field to the right.



## Folder creation options in different Projetex windows

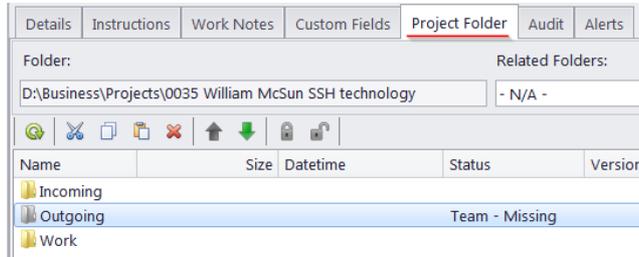
Edit windows for quotes, projects, experts, jobs and so on, have an option for quick folder access - a button to the right of the folder address that opens the folder in the Projetex 3D explorer, and creates it if it does not exist yet.



Also **Edit Job** windows have folder access tabs for quick access to job work files. These tabs are:

- **Project Folder** for client jobs
- **JA Folder** for corporate jobs

- **PO Folder** for freelance jobs



Each of these folder types has a set of related folders. Use the **Related Folders** drop-down list to quickly open any of them in the field to the right. The following folders can be quickly accessed from **Edit Job** windows:

**New Client Job (Edit Client Job)** — the *Project* folder of the host project. Related folders options:

- **FTP client**
- **JA folders** of corporate jobs belonging to the client job
- **PO folders** of freelance jobs belonging to the client job
- **Client folder** of the respective client.

**New Freelance Job (Edit Freelance Job)** — the *PO* folder of the job's purchase order. Related folders options:

- **Project folder** of the respective project
- **FTP client**
- **JA folders** of corporate jobs belonging to the same Client Job
- **PO folders** of other freelance jobs belonging to this Client Job

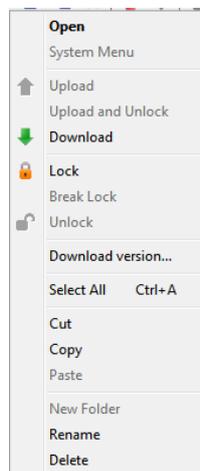
**New Corporate Job (Edit Corporate Job)** — *JA* folder of related job assignment. Related folders options:

- **Project folder** of the respective project
- **FTP client**
- **PO folders** of freelance jobs belonging to the same Client Job
- **JA folders** of other corporate jobs belonging to this Client Job

Two more related folder options are available in all Edit windows:

- **Public folder** containing files accessible to all Projetex users
- **Local folders** granting access to the host machine's entire file system

## Contextual Menu



When a user right-clicks on files or folders in the **Files** tab, the **Contextual Menu** is called. It has the following options:

**Open** - open the file using the default application.

**System Menu** - calls the *Windows Context Menu*.

**Upload** - upload the selected files to the *server*.

**Upload and Unlock** - upload the selected files to the server and unlock them. Only available for locked files.

**Download** - download selected files to the *local machine*.

**Lock** - lock selected files.

**Break Locks** - unlock selected files locked by another user. It does not affect files locked by the current user.

**Unlock** - unlock selected files locked by the current user.

**Download versions** - open the **File versions** window to load a previous version of the selected file.

**Cut/Copy/Paste** - cut, copy or paste files and/or folders.

**New Folder** - create a new folder in the selected location.

**Rename** - rename a file or folder.

**Delete** - delete selected files or folders.

See also:

[File Sharing and Synchronization](#)

[Shortcuts](#)

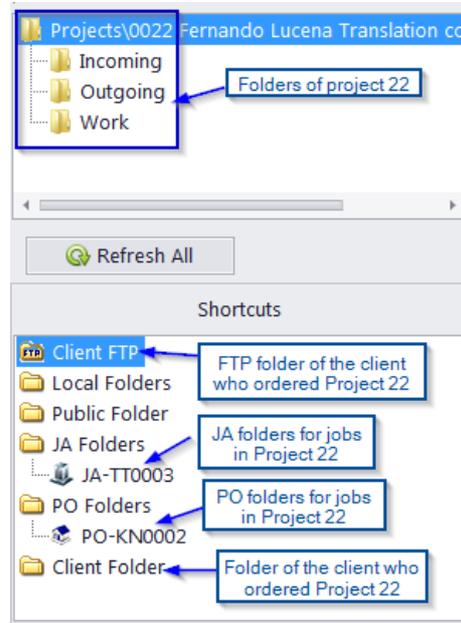
[FTP folders access](#)

[File versions](#)

# Shortcuts

Shortcuts contain information relevant to the currently open folder. For example, a manager working with project files might also need access to the purchase orders and job assignment folders. To quickly open folders of a particular project's POs and JAs, the **Shortcuts** interface can be used.

## Example:



Shortcuts vary, depending on the context.

*Client* shortcuts: *Project* folders of this client's projects.

*Project* shortcuts: *Job Assignment* folders, *Purchase Order* folders, *Client* folder of the selected project.

*Corporate expert* shortcuts: *Job Assignment* folders of the selected expert.

*Freelance expert* shortcuts: *Purchase Order* folders of the selected expert.

The **Shortcuts** list can also be used to open any folder on the local PC, as well as to connect to and work with the FTP folder.

Select the **Local Folders** option to explore the local machine's file system.

Select **Public Folder** to open the shared folder available to all workstation users.

Select **Client FTP**, **Expert FTP** or **Freelancer FTP** to connect and work with FTP folders.

 **Note:** Prospects and applicant have only **FTP**, **Local Folders** and the **Public Folder** as shortcuts.

 **Note:** If you change the client code or expert name (it can be done from the **Main** tab of the **Client** or **Expert** windows respectively, Projotex will attempt to rename the appropriate folder.

 **Note:** The location of the *BusinessServer* folder can be changed on the **Folders** tab of the **Advanced Settings** window.

---

See also:

Working with files in Projotex

# FTP folders access

Projetex features a built-in FTP client, which can be used to quickly access FTP folders of clients and experts to upload or download workflow files.

To access the FTP client:

1. Open the **Files** tab of any client, project or expert.
2. In **Shortcuts** field select the **Client/Expert/Freelancer FTP** option.

## FTP access interface

The **FTP** indicator indicates the connection status. A red indicator means the FTP folder is disconnected. A green indicator means the connection is open.

Click the **Connect/Disconnect** button to connect/disconnect the FTP server currently selected in the drop-down list.



Click the **Manage Connection** button  to create a new FTP connection or edit/delete the currently selected FTP connection.

## Creating a new FTP Connection

To connect to an FTP folder you will need to create an **FTP Connection** for this folder, which implies entering the FTP server address and login information, which later will be used by Projetex to log into this FTP folder.

To create a new connection:

1. Click the **Manage Connections** button .
2. Select **New connection ...** in the menu:
3. Enter a name for the new connection, the FTP server address, the user name (FTP login) and password (Projetex will store your password).
4. Click **OK** to create the FTP connection.

## Connecting to FTP

Once an FTP connection has been created, it can quickly be activated via the **FTP connections** drop-down list.

1. Select the required **FTP Connection** in the drop-down list to connect to this FTP server.
2. Click the **Connect** button to display the contents of the FTP folder in the field below.

---

See also:

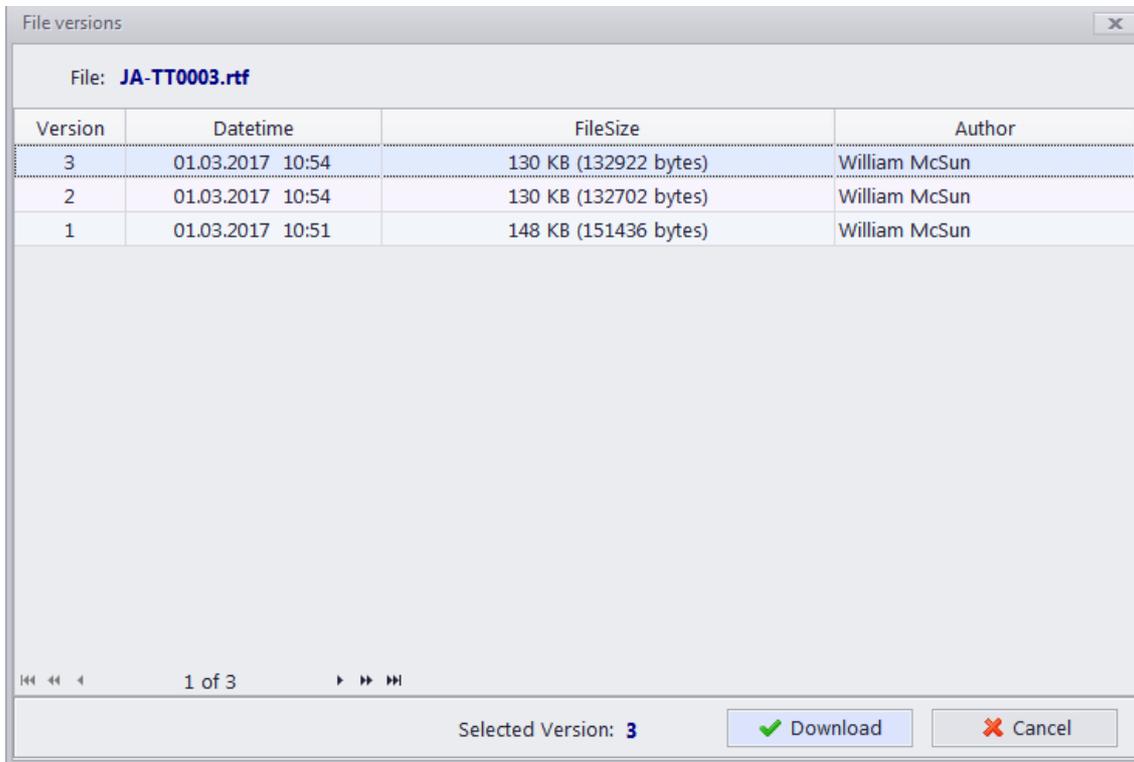
[Working with files in Projetex](#)

# File versions

Any changes to the files stored on the server are tracked. When a file is altered, the previous version is saved as a separate file to the *Versions* sub-folder within *BusinessServer* on Server machine.

It is possible to restore any version of the file in the Projetex 3D Explorer or any **Files** tab in the workstation.

To open the list for previous version of a file, right-click on it and select **Download version**.



---

See also:

[Working with files in Projetex](#)

Table of file versions shows the version number, modification date and time, file size and author.

Selecting a version and clicking the **Download** button will copy the file from the *Versions* archive and replace the current version in the local Business folder with the archived version.

# Template Basics

All documents issued in Projetex can be saved to an *RTF*, *DOC* or *PDF* file, or sent directly to the printer. The layout of the resulting file or printout will be determined by a *template*.

A template is an *RTF* ("Rich Text Format") file, the layout of which is used when saving Projetex documents. *RTF* files can be opened using most text editors, including MS Word.

Document templates can be created and edited by the user. Each document can have a number of alternate templates.

The following documents can be saved as printable *RTF*, *PDF* and *DOC* files using their own templates:

- Invoices to clients.
- Credit notes from clients
- Refunds to clients
- Purchase orders to freelancers.
- Payment summaries from clients.
- Summaries of payments to freelancers and corporate experts.
- Project, client job and expert job summaries.
- Job assignments to corporate experts.
- Quotes to clients and prospects.
- Quotes to freelancers and applicants.
- Prices for clients and prospects.
- Prices for corporate experts, freelancers and applicants.

---

See also:

[Saving and Printing Documents](#)

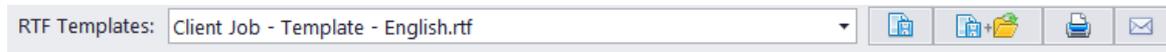
[Template Storage and Management](#)

[Locale Settings And Date Format](#)

# Saving and Printing Documents

Template-based documents can be created using the windows **Edit Invoice**, **Edit PO**, **Edit Project** and so on, as well as the **Prices** tabs of the **Client**, **Prospect**, **Freelancer**, **Corporate Expert**, and **Applicant** windows, and the corresponding **General Prices** windows.

Any window which has an **RTF Templates** area can be used to save its data in a printable document via the RTF template controls:



Use the **RTF Templates** drop-down list to select the template to be used to create a new RTF document.

Click **Save** to save the record with the selected template in the respective folder.

Click **Save&Open** to open this document in your default text editor immediately after saving it.

Click **Print** to quickly send this document to printer.

Click **Send Mail** to open the Projetex Mail Sender with the document already attached, the subject, message template and default recipient entered. From there you can quickly send the document via E-mail.

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

---

See also:

Template Basics

Template Storage and Management

# Template Storage and Management

In Projetex all templates are stored in subfolders of the *Templates* folder in the centralized *BusinessServer* folder on the server. In order to work with a template, you will need to download a local copy, or create a new local template which later can be uploaded to the server.

To manage templates, click **Corporate Settings > Templates** in the **Backstage** view.

Templates are stored in different folders, each determining the type of document the template is meant for. Any RTF files located in that folder will be recognized by Projetex as a template for the document that folder represents.

## Example:

An RTF file *anyname.rtf*, located at *D:\BusinessServer\Templates\CLIENTS/Invoices/* will be recognized by as an invoice template. It will appear in the **RTF Templates** drop-down list of the **Edit Invoice** window.

Only local template files, located in the local *Business* folder (by default *D:\Business\*) can be used to save documents. Templates stored in the centralized *BusinessServer* folder are meant for sharing and updating templates on Projetex Workstations. Thus when you open a template file for editing, you open your local copy of that template. Any changes you make will be valid for your Projetex Workstation only, unless you choose to upload or update the template on the server.

## Templates synchronization

After templates have been uploaded to the server, they will update on all local *Business* folders automatically. The new template will be downloaded to the local *Business* folders after a user chooses this template from the **RTF Templates** drop-down list and clicks **Save**, **Save&Open**, **Print** or **Send Mail**.

---

See also:

[Template Basics](#)

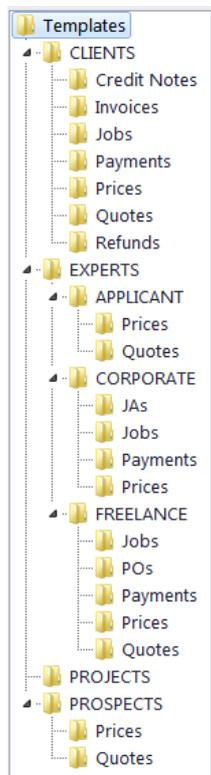
[Saving and Printing Documents](#)

[Editing Templates](#)

# Editing Templates

## Template files

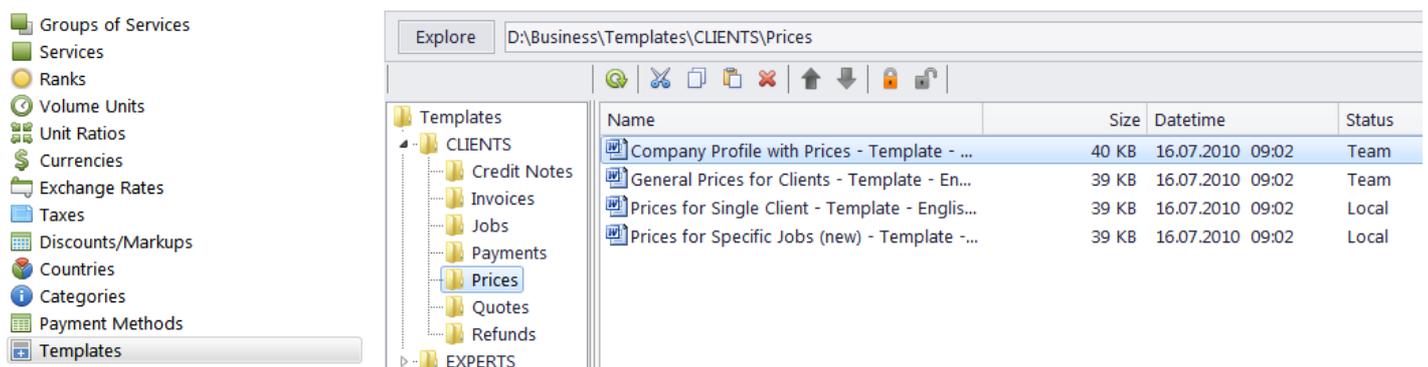
Each document type (like invoices, purchase orders, quotes, and so on) uses templates stored in a specific folder, related to a specific document type:



By editing the template's layout and format, you edit layout and format of all the documents which will be saved with the help of this template. A number of alternative templates can be created for one document type.

## Opening Templates for Editing

Templates can be downloaded, created, edited and uploaded to the server in the **Templates** section of the Projotex Workstation **Corporate Settings** window.



To open the **Templates** settings:

1. In the **Backstage** view of Projotex Workstation click **Corporate Settings > Templates**.
2. Navigate template folders to locate required template and double-click to open template file in text editor (MS Word or any other editor supporting RTF format).
3. After making all the necessary changes, save the **Template** in the same or a new RTF file of the same folder.

**Note:** When you open a template file for editing, you open your local copy of that template. Any changes you make will be valid for your Projotex Workstation only, unless you choose to upload or update the template on the server. Be sure to regularly check the Statuses of your templates to see if they need updating on the Workstation or on the server.

# Template Variables

A Variable is a certain symbol combination which is entered into template files. When a document is saved using a template, Projotex recognizes the variables and inserts required data in the resulting document.

Variables are indicated with "\" (backslash) symbols at the beginning and end,

## Example:

```
\CLIENT_NAME\, \CLIENT_STREET1\, \CLIENT_PHONE1\
```

Each variable represents a portion of data which will be inserted in its place when the document is saved.

 **Note:** Templates can be edited without changing the variables' wording and layout (fonts and colors can still be changed).

---

See also:

[Template Basics](#)

[Logic and Syntax of Templates](#)

[Advanced commands and functions](#)

[Locale Settings And Date Format](#)

# Logic and Syntax of Templates

## Variables

All variables and commands can be identified by the `\` (*backslash*) symbol at the beginning and end. Variables display data extracted from the Projotex database, and relevant to each particular saved document.

### Example:

In the example below you can see the `\CLIENT_NAME\`, `\CLIENT_STREET1\` and `\CLIENT_PHONE1\` variables, along with some static text:

```
To: \CLIENT_NAME\  
Address: \CLIENT_STREET1\  
Phone: \CLIENT_PHONE1\
```

When you use this template by clicking **Save** or **Print** in some dialog box, the `\CLIENT_NAME\` variable will be replaced by the name of the current *client*, valid to this particular document, `\CLIENT_STREET1\` — by the *client's street address* and `\CLIENT_PHONE1\` — by the *client's phone number*. The final output will look like this:

```
To: XYZ Company  
Address: Elm Street, 1  
Phone: +1 212 898 11 31
```

Variables like `\INVOICE_CODE\` will display the code of the currently saved invoice, variables like `\INVOICE_DATE\` will display the issue date of current invoice, and so on.

 **Note:** Numerical values are sometimes surrounded by the `fnum` command. This command simply tells the parser to round up the value to the specified number of digits after decimal point (2 digits in the example below).

### Example:

```
Job Total: \fnum(dtLinkJobs:TOTAL, 2)\
```

## Data Scan commands

Another feature of RTF templates are **Data Scan** commands. These are used to create tables in which the number of rows is determined by the number of records in the database.

1. Begin by entering the `\scan(dtLinkJobs)\` command. This must not necessarily be `dtLinkJobs`, depending on the template, this can be:

- `\scan(dtLinkJobs)\` — in *invoices*, *job assignment* and *PO* templates, to display the jobs included in an invoice, *JA* or *PO*.
- `\scan(dtLinkInvoices)\` — in *payment* templates to display the invoices linked to the payment.
- `\scan(dtLinkPayments)\` — in *invoice* and *PO* templates to indicate linked sums.

2. Insert the table header between `\scan(dtLinkJobs)\` and `\scanentry\`.

3. Insert one row of data-columns after `\scanentry\`. Every variable in the table must be preceded with the `dtlink` command. For instance, if the table begins with `\scan(dtLinkJobs)\`, each variable must have this link included: `\dtLinkJobs:JOB_NAME\`, `\dtLinkJobs:COMPLETED\`, and so on.

4. Insert `\endscan\` after data-columns.

 **Note:** Use `noeof` to hide the table's header and footer if the table body appears to be empty. For instance, if your *invoice* includes only *jobs* and no *expenses*, the header and footer for *expenses* will not be saved/printed.

### Example:

```
\scan:dtlinkJOBS\  
PO No.           Job Name  
\scanentry\  
\dtlinkJobs:PO\  \dtlinkJobs:JOB_NAME\  
\scanfooter\  
Jobs Total: \JOBS_TOTAL\  
\endscan\
```

The command `\scan(dtLinkJobs)\` will make the parser scan through all selected data in the **Jobs** table (in this particular case all *jobs* included in the *invoice*) and output them to the file or printer.

The text between `\scan(dtLinkJobs)\` and `\scanentry\` is the table header.

The text between `\scanfooter\` and `\endscan\` is the table footer and will only be displayed once at the end of this table.

The text between `\scanentry\` and `\scanfooter\` is the table's "body". It includes variables from columns which must be listed in the table. In the 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.

## Condition checking

This allows the template to react to certain varying conditions and produce an output suitable to each of possible conditions. The logic is the following `\IF(condition)\ Reaction \ENDIF\`.

### Example:

If *Discount 1* is applied, display the *discount name*, *discount value* and *subtotal*. The code is as follows:

```
\IF(DISCOUNT1) \  
\DISCOUNT1NAME\ : \DISCOUNT1VALUE\  
Subtotal: \AFTERDISCOUNT1\ \endif\  
\ENDIF\  
\ENDIF\
```

This will make the template check if discount 1 is applied, and if so — display the data between the `\IF(...)\` and `\ENDIF\` commands. `DISCOUNT1` is a logical variable, i.e. it can have one of two values: either true or false. In this particular case, Projotex sets `DISCOUNT1` to true if the first discount is present and to false, if there is no first discount.

When `\IF(DISCOUNT1)\` is encountered in the template, the parser checks the `DISCOUNT1` logical value, and if it is true, runs the code below this command, until `\endif\` is encountered, which instructs the parser to stop. If `DISCOUNT1` is false, everything until the `\endif\` command is skipped.

In this particular case, without the `\IF(DISCOUNT1)\` command, the parser would output the empty string with an empty **Subtotal** in cases when there would not be discount. But with the `\IF(DISCOUNT1)\` command, the above block is skipped entirely if the condition is false.

## Arithmetic calculations syntax

Arithmetic can be performed in templates with the following syntax:

```
\((JOBS_TOTAL+100-10)*10)/2\  
\ENDIF\  
\ENDIF\
```

The whole expression must be included in backslashes;

All arithmetic operations must be defined by the following symbols `+ - / *`;

The brackets inside backslashes must be positioned by the rules of arithmetic.

## Logical operations syntax

Logical operations: `&&` (and), `||` (or), `!` (not), can be performed in templates with the following syntax:

```
\IF( (table1:field1>b+1) || (table1:field1=0) ) \  
.....  
\ENDIF\  
\ENDIF\
```

For more details on Variables for each document type, see the chapters of "Available Template Variables".

It is recommended to begin with the Common Template Variables topic.

---

See also:

Template Basics

Advanced commands and functions

# Advanced commands and functions

Format of the *IF-ELSIF-ELSE-ENDIF* construction is:

```
\If(Condition1)\  
Reaction1  
\elseif(Condition2)\  
Reaction2  
\else\  
Reaction3  
\endif\
```

 **Note:** `\If` and `\endif` are the mandatory commands in this construction, `\elseif` and `\else` are an optional commands. The condition must be a variable with a boolean value. Such variables can have only two values: True or False.

## Example:

### Invoice template

```
\If(INV_IS_PAID)\  
Invoice is paid  
\else\  
Invoice is not paid  
\endif\
```

### Explanation

If the invoice is paid (INV\_IS\_PAID=True), then "Invoice is paid" is displayed in the produced invoice,  
if invoice is not paid (INV\_IS\_PAID=False), then "Invoice is not paid" is displayed in the produced invoice.

or

### Invoice template

```
\scan(dtLinkJobs)\  
.....  
\scanentry\  
.....  
\If(INV_IS_PAID)\  
Invoice is paid  
\elseif(DTLINKJOBS:CJOB_ISCOMPLETED=true)\  
Invoice is not paid  
\else\  
Job is not completed  
\endif\  
  
\scanfooter\  
.....  
\endscan\
```

### Explanation

If the invoice is paid (INV\_IS\_PAID=True), then "Invoice is paid" is displayed in the produced invoice,  
if invoice is not paid (INV\_IS\_PAID=False), then, if (DTLINKJOBS:CJOB\_ISCOMPLETED=true), then "Invoice is not paid" is displayed in the produced invoice,  
if invoice is not paid (INV\_IS\_PAID=False) and if (DTLINKJOBS:CJOB\_ISCOMPLETED=false), then "Job is not completed" is displayed in the produced invoice.

## IIF function

Function **IIF** returns one of the two values depending on the value of a logical expression. The syntax is: IIF(Logical\_expr, Value1, Value2)

### Invoice template

```
\scan(dtLinkJobs)\  
...  
\scanentry\  
...  
\IIF(DTLINKJOBS:CJOB_ISCOMPLETED=true,100,0)\  
...  
\scanfooter\  
...  
\endscan\
```

### Explanation

If the Client Job is completed (DTLINKJOBS:CJOB\_ISCOMPLETED=true) then 100.00 is displayed in the produced invoice.  
If the Client Job is not completed (DTLINKJOBS:CJOB\_ISCOMPLETED=false), then 0.00 is displayed in the produced invoice.

## Numeric report functions.

**ROUND** - The Round function rounds a real-type value to an integer-type value. 0.5 is always processed to largest integer number. This is not a banker's rounding.

Invoice template	Explanation
<code>\Round (JOBS_TOTAL) \</code>	If Jobs Total is 504.49, then 504 is displayed in the produced invoice, If Jobs Total is 504.50, then 505 is displayed in the produced invoice.

**INT** - The INT function returns the integer part of a real number.

Invoice template	Explanation
<code>\Int (JOBS_TOTAL) \</code>	If Jobs Total is 504.49, then 504 is displayed in the produced invoice, If Jobs Total is 504.51, then 504 is displayed in the produced invoice.

## SUM function

Function SUM can be used after `\scan(dtLinkJobs)`, `\scan(dtLinkInvoices)` or `\scan(dtLinkPayments)` to give to some new custom variable the value of the sum of the values in the defined field. The syntax is:

```
\scan(table1)\
\endscan, sum(field of the table1, variable1)\
Total: \variable1\
```

Invoice template	Explanation
<code>\scan(dtLinkJobs)\ \endscan, sum(DTLINKJOBS:CJOB_TOTAL, V1)\ Total: \V1\</code>	Variable V1 is set to return the sum of client job totals anywhere in this invoice, just by entering <code>\V1\</code> anywhere below in this invoice. If there are two client jobs in this invoice with totals of 345.00 and 678.00, then Total: 1023.00 will be displayed in the produced invoice.

## CTN function

Function CTN can be used after `\scan(dtLinkJobs)`, `\scan(dtLinkInvoices)` or `\scan(dtLinkPayments)` to give to some new custom variable the value of number of data field entries with values  $< > 0$ . The syntax is:

```
\scan(table1)\
\endscan, ctn(field of the table1, variable1)\
Total: \variable1\
```

Invoice template	Explanation
<code>\scan(dtLinkJobs)\ \endscan, ctn(DTLINKJOBS:CJOB_TOTAL, V1)\ Number of Client Jobs: \V1\</code>	Variable V1 is set to return the number of client jobs with totals that are $< > 0$ anywhere in this invoice, just by entering <code>\V1\</code> anywhere below in this invoice. If there are three client jobs in this invoice with totals of 345.00, 678.00 and 901.00, then Number of Client Jobs: 3.00 will be displayed in the produced invoice.

## NORESET option with SUM and CTN functions

**NORESET** option can be used with SUM and CTN functions to add the new values of the source field to the previous result of the function. The syntax is:

```
\scan(table1)\
.....
\endscan, sum(field of the table1, variable1)\
\scan(table2)\
.....
```

```
\endscan, sum(field of the table2, variable1,noreset)\  
All totals: \variable1\
```

**Invoice template****Explanation**

```
\scan(dtLinkJobs)\  
\endscan,  
sum(DTLINKJOBS:CJOB_TOTAL,  
V1)\  
\scan(DTLINKPAYMENTS)\  
\endscan,  
sum(DTLINKPAYMENTS:  
CPAYM_TOTAL, V1,noreset)\  
Total: \V1\
```

Variable V1 is set to return the sum of client job totals plus payment totals anywhere in this invoice, just by entering \V1\ anywhere below in this invoice. If there are two client jobs in this invoice with totals of 345.00 and 678.00 and one payment with total of 77.00 , then

Total: 1100.00 will be displayed in the produced invoice.

For more details on Variables for each document type, see the chapters of "Available Template Variables".

It is recommended to begin with the Common Template Variables topic.

---

See also:

Template Basics

# Locale Settings And Date Format

The locale format determines the format of dates, decimal numbers, and currency volumes in the resulting document. If your clients or freelancers work in different countries their locale format is very likely different from yours. To make templates display the correct date and time format, correct digit grouping or decimal separator symbols, and so on, configure the locale settings and set the desired format.

There are two ways of configuring the locale format:

1. In the Projetex Workstation (for each client and freelancer individually):

- open the **Client** or **Freelancer** window and click the **Main** tab;
- click the **Locale Format** button in client's profile;
- select **Custom Values** in the drop-down list at the top;
- configure the code in **Short Date Format** and/or **Long Date Format** to include 4-5 capital M letters (like dd.MMMM.YYYY).

Locale of Unlimited Concepts Unified

Generation of RTF files: Custom Values

Default Locale: Custom Values

Negative Currency Format: -1,1

Decimal Symbol: ,

No. of digits after Decimal: 2

Digit Grouping Symbol:

Date Separator: .

Short Date Format: dd/MM/yyyy

Long Date Format: d MMMM yyyy' p.'

Samples:

Positive Number: 123 456 789,00

Negative Number: -123 456 789,00

Short Date: 08.06.2017

Long Date: 8 червня 2017 р.

OK Cancel

**Note:** The **Long Date Format** is used for "long" date variables: \DATE\_DUE\_LONG\, \INVOICE\_DATE\_LONG\, and so on. the settings in **Short Date Format** will affect regular variables, like \DATE\_DUE\, \INVOICE\_DATE\, and so on.

2. In the Windows Control Panel (these settings are used as default in Projetex):

- open the Windows Control Panel and double-click **Regional and Language Options**
- click the **Customize** button on the **Regional Options** tab and click the **Date** tab
- configure the long (or short) date format options to include 4-5 capital M letters (like dd.MMMM.YYYY). To remove the day of the week from view, delete the extra "d" letters, so that no more than 2 "d-s" are present in the code string.

See also:

Template Basics

# Common Template Variables

The following variables can be used in all of the Projetex templates.

## User Information Variables

### Code to paste to template

`\COMPANY_NAME\`

`\COMPANY_PAYMENT_TERMS\`

`\COMPANY_PAYMENT_TERMS_NOTES\`

`\COMPANY_CURRENCY\`

`\CURRENT_USER_NAME\`

`\CURRENT_USER_POSITION\`

### Information to be displayed in the saved document

The name of the registered company (i.e. your company name) taken from your License Key. This name cannot be modified, however you can delete this variable from the template and type your preferred name directly.

Payment terms set for freelance experts. Can be changed in **Administrator >> General** settings.

Notes, entered for payment terms to freelance experts. Can be changed in **Administrator >> General** settings.

Base currency of your company. Can be changed in **Administrator >> General** settings.

Name of the Projetex Workstation user, who saved (printed) document. Can be changed in **Administrator >> Users and Access** settings.

Position of the Projetex Workstation user, who saved (printed) document. Can be changed in **Administrator >> Users and Access** settings.

## Date Variables

### Code to paste to template

`\DATE\`

`\DATE_LONG\`

### Information to be displayed in the saved document

Date in short format.

**Example:**

10/4/2006

Date in long format.

**Example:**

Monday, October 04, 2006

---

See also:

[Logic and Syntax of Templates](#)

[Advanced commands and functions](#)

# Date and Time Functions

In most cases the database stores the complete date and time. Certain commands can be used to customize the format of the output date and time data (you may want to output only the *day* of the *week* or only the time etc.).

The following date and time functions can be used in all templates:

- `fmtdt`
- `wd`
- `date`
- `time`

 **NOTE:** These functions return the value according to the Regional and Language Options settings in your system. These options can be changed with the help of your Windows Control Panel.

The same variable will be displayed in a different way depending on the function used.

FUNCTION:	VARIABLE VALUE:	FUNCTION APPLIED:
fmtdt	9/20/06 6:00 PM	Wednesday, September 20, 2006 6:00 PM
	9/20/06	Wednesday, September 20, 2006
wd	9/20/06 6:00 PM	Wednesday
	9/20/06	Wednesday
date	9/20/06 6:00 PM	09/20/06
	9/20/06	09/20/06
time	9/20/06 6:00 PM	6:00 PM
	9/20/06	(empty row)

Date and time functions are accessible in all templates and can be applied to:

- All variables from datasets which return date and time.
- All variables from the following table:

VARIABLE:	TYPE:	DESCRIPTION:
\PROJECT_DATE_STARTED\ \	Project template variable	Date when the <i>project</i> was started in the following format: 9/20/2006.
\PROJECT_DATE_DEADLINE\ \	Project template variable	<i>Project</i> deadline in the following format: 9/20/2006.
\PROJECT_DATE_COMPLETED\ \	Project template variable	Date of the <i>project</i> completion in the following format: 9/20/2006.
\ASSIGNED\ \	Client Jobs template variable	Date when the <i>job</i> was assigned in the following format: 9/20/2006.
\DEADLINE\ \	Client Jobs template variable	<i>Job</i> deadline in the following format: 9/20/2006
\COMPLETED\ \	Client Jobs template variable	Completion date in the following format: 9/20/2006.
\DONE\ \	Client Jobs template variable	Completion date in the following format: 9/20/2006.
\START\ \ESTSTART\ \	Quotes template variable	Date assigned in the following format: 9/20/2006.
\COMPLETION\ \ESTCOMPLETION\ \	Quotes template variable	Deadline date in the following format: 9/20/2006.

## Syntax

Date and time functions are added to the variable in the following way:

\function(VARIABLE)\

➔ **Example**

To add the wd function to the \ASSIGNED\ variable from the *client jobs* template, change the variable syntax in the following way:

\wd(ASSIGNED)\

The result will be the day of the week, when the *job* was assigned (e.g. Wednesday).

---

See also:

[Logic and Syntax of Templates](#)

[Advanced commands and functions](#)

# Client Template Variables

Client variables refer to clients relevant to the document. For example, in an invoice template the \CLIENT\_NAME\ variable will return the name of client, to whom the invoice was issued.

## Client Data Template Variables

### Code to paste to template

\CLIENT\_NAME\

\CLIENT\_CODE\

\CLIENT\_CURRENCY\

\CLIENT\_PAYMENT\_TERMS\

\CLIENT\_MINFEE\

\CLIENT\_PAYMENT\_TERMS\_NOTES\

\CLIENT\_ADDRESS\

\CLIENT\_STREET1\

\CLIENT\_STREET1\_C\

\CLIENT\_STREET2\

\CLIENT\_STREET2\_C\

\CLIENT\_CITY\

\CLIENT\_CITY\_C\

\CLIENT\_STATE\

\CLIENT\_STATE\_C\

\CLIENT\_COUNTRY\

\CLIENT\_COUNTRY\_C\

\CLIENT\_ZIP\

\CLIENT\_ZIP\_C\

\CLIENT\_EMAIL1\

\CLIENT\_EMAIL2\

\CLIENT\_PHONE1\

\CLIENT\_PHONE2\

\CLIENT\_PHONE3\

\CLIENT\_PHONE4\

\CLIENT\_FAX\

\CLIENT\_WEB\

\CLIENT\_MINFO\

\CLIENT\_MWEB\

\CLIENT\_INFO\

\CLIENT\_VATNUM\

### Information to be displayed in the saved document

Name of client.

Client Code of client.

Client's currency.

Payment terms of client.

#### Example:

Within 30 days

Minimum fee set in payment terms of client.

Text, entered in the **Additional Notes** field of client's payment terms.

Complete address of client. Order of different elements can be changed in **Administrator >> General** settings.

Street address of client (entered into the upper **Street Address** field).

Street address of client, followed by a comma (not displayed if **Street Address** field is empty).

Alternate/second street address of client (entered into the lower **Street Address** field).

Alternate/second street address of client, followed by a comma (not displayed if **Street Address** field is empty).

Client's city of residence.

Client's city name, followed by a comma (not displayed if **City** field is empty).

Client's state/province of residence.

Client's state/province, followed by a comma (not displayed if **State** field is empty).

Client's country of residence.

Client's country of residence, followed by a comma (not displayed if **Country** field is empty).

Client's ZIP code.

Client's ZIP code, followed by a comma (not displayed if **ZIP Code** field is empty).

E-mail address of client.

Additional e-mail address of client.

Phone number of client.

Additional phone number of client.

Additional phone number of client.

Additional phone number of client.

Fax number of client.

Web site address of client.

Text, entered in the **Marketing Notes** section on the **Marketing** tab of **Client** window.

Text, entered in the **Marketing Link** section on the **Marketing** tab of **Client** window.

Text, entered in the **Additional Information** section on the **Main** tab of **Client** window.

VAT code of a client.

---

See also:

[Logic and Syntax of Templates](#)

[Advanced commands and functions](#)

# Project Template Variables

## Code to paste to template

`\PROJECT_NAME\  
\PROJECT_CODE\  
\PROJECT_CLIENT_NAME\  
\PROJECT_CLIENT_CODE\  
\PROJECT_INFO\  
\CORPORATE_PM_NAME\  
\CLIENT_PM_NAME\  
\PROJECT_DATE_STARTED\  
  
\PROJECT_DATE_DEADLINE\  
  
\PROJECT_DATE_COMPLETED\  
  
\PROJECT_DATE_STARTED_LONG\  
  
\PROJECT_DATE_DEADLINE_LONG\  
  
\PROJECT_DATE_COMPLETED_LONG\`

## Information to be displayed in the saved document

Name of project.  
Project code.  
Client project created for.  
Client reference number.  
Information about the project.  
Corporate project manager  
Client project manager  
Date when project was started, in the following format:  
10/4/2006.  
Project deadline, in the following format:  
10/4/2006.  
Date of project completion, in the following format:  
10/4/2006.  
Date when project was started, in the following format:  
Monday, October 04, 2006.  
Project deadline, in the following format:  
Monday, October 04, 2006.  
Date of project completion, in the following format:  
Monday, October 04, 2006.

---

See also:

[Logic and Syntax of Templates](#)

[Advanced commands and functions](#)

# Contact Template Variables

**Code to paste to template**    **Information to be displayed in the saved document**

<code>\SALUTATION\</code>	Salutation of contact. <b>Example:</b> Mr., Ms., Mrs.
<code>\TITLE\</code>	Contact title.
<code>\CONTACT_NAME\ \PM_NAME\ \ATTENTION\ \CONTACT_EMAIL1\ \CONTACT_EMAIL2\ \CONTACT_PHONE1\ \CONTACT_PHONE2\ \CONTACT_FAX\ \CONTACT_NOTES\ </code>	Contact name.
	Contact email address.
	Contact email address 2 (if available).
	Contact phone number.
	Contact phone number 2 (if available).
	Contact fax number.
	Contact notes.

---

**See also:**

[Logic and Syntax of Templates](#)

[Advanced commands and functions](#)

# Quote Template Variables

## Common Quote Variables

<b>Code to paste to template</b>	<b>Information to be displayed in the saved document</b>
<code>\QUOTE_NAME\</code>	Quote name.
<code>\QUOTE_CODE\</code>	Quote code.
<code>\CODE\</code>	
<code>\REQUEST\</code>	Request for quote.
<code>\ANSWER\</code>	Answer to request for quote.
<code>\DATE_SENT\</code>	Date the quote was sent, in the following format:
<code>\SENT\</code>	10/4/2006
<code>\DATE_SENT_LONG\</code>	Date sent, in the following format:
<code>\LONGSENT\</code>	Monday, October 04, 2006
<code>\START\</code>	Date the quote was assigned, in the following format:
<code>\ESTSTART\</code>	10/4/2006
<code>\START_LONG\</code>	Date the quote was assigned, in the following format:
<code>\LONGESTSTART\</code>	Monday, October 04, 2006
<code>\COMPLETION\</code>	Deadline date, in the following format:
<code>\ESTCOMPLETION\</code>	10/4/2006
<code>\LONG_COMPLETION\</code>	Deadline date, in the following format:
<code>\LONGESTCOMPLETION\</code>	Monday, October 04, 2006
<code>\STATUS\</code>	Status of quote (unknown, accepted, rejected, corrected, received)

## Quote totals

<b>Code to paste to template</b>	<b>Information to be displayed in the saved document</b>
<code>\TOTAL\</code>	Quote total in client's currency
<code>\TOTAL_BASE\</code>	Quote total in base currency
<code>\JOBS_TOTAL\</code>	Jobs total in client's currency
<code>\JOBS_TOTAL_BASE\</code>	Jobs total in base currency
<code>\NET_JOBS_TOTAL\</code>	Jobs total with discounts in client's currency
<code>\NET_JOBS_TOTAL_BASE\</code>	Jobs total with discounts in base currency
<code>\VOLUME_BASE\</code>	Jobs total volume in base units

## Taxes

<b>Code to paste to template</b>	<b>Information to be displayed in the saved document</b>
<code>\TAX1\</code>	Indicates if tax 1 has been added; used in algorithms (If tax 1 exists = True, if it doesn't = False)
<code>\TAX1_NAME\</code>	Tax 1 name
<code>\TAX1_PERCENTS\</code>	Tax 1 value in percents
<code>\TAX1_VALUE\</code>	Tax 1 value in client's currency
<code>\TAX1_VALUE_BASE\</code>	Tax 1 value in base currency
<code>\TAX2\</code>	Used in algorithms (If tax 2 exists = True, if it doesn't = False)
<code>\TAX2_NAME\</code>	Tax 2 name
<code>\TAX2_PERCENTS\</code>	Tax 2 value in percents

<code>\TAX2_VALUE\</code>	Tax 2 value in client's currency
<code>\TAX2_VALUE_BASE\</code>	Tax 2 value in base currency
<code>\TAXES\</code>	Indicates whether the taxes in Tax fields are set; used in algorithms (If any tax is set = True, if it they are not = False)
<code>\AFTER_TAX1\</code>	Total in client's currency after Tax 1 is applied
<code>\AFTER_TAX1_BASE\</code>	Total in base currency after Tax 1 is applied

## Discounts

<b>Code to paste to template</b>	<b>Information to be displayed in the saved document</b>
<code>\DISCOUNT1\</code>	Indicates if discount/markup 1 is set; used in algorithms (If discount 1 exists = True, if it does not = False)
<code>\DISCOUNT1_NAME\</code>	Discount 1 name
<code>\DISCOUNT1_PERCENTS\</code>	Discount 1 value in percents
<code>\DISCOUNT1_VALUE\</code>	Discount 1 value in client's currency
<code>\DISCOUNT1_VALUE_BASE\</code>	Discount 1 value in base currency
<code>\DISCOUNT2\</code>	Indicates if discount/markup 2 is set; used in algorithms (If discount 2 exists = True, if it does not = False)
<code>\DISCOUNT2_NAME\</code>	Discount 2 name
<code>\DISCOUNT2_PERCENTS\</code>	Discount 2 value in percents
<code>\DISCOUNT2_VALUE\</code>	Discount 2 value in client's currency
<code>\DISCOUNT2_VALUE_BASE\</code>	Discount 2 value in base currency
<code>\DISCOUNTS\</code>	Indicates if discounts/markups are set; used in algorithms (If any discount is set = True, if there are no = False)
<code>\AFTER_DISCOUNT1\</code>	Total in client's currency after Discount 1 is applied
<code>\AFTER_DISCOUNT1_BASE\</code>	Total in base currency after Discount 1 is applied

## Draft Client Job variables for Quotes to Clients

The following variables refer to draft client jobs added to the client quote. These variables do not apply to freelancer quotes.

<b>Code to paste to template</b>	<b>Information to be displayed in the saved document</b>
<code>\DTMULTIQUOTEITEMS:QI_NAME\</code>	Name of draft client job.
<code>\DTMULTIQUOTEITEMS:GROUP_NAME\</code>	Group of services of draft client job.
<code>\DTMULTIQUOTEITEMS:SERV_NAME\</code>	Service name of draft client job.
<code>\DTMULTIQUOTEITEMS:UNIT_NAME\</code>	Units in which draft client job volume is specified.
<code>\DTMULTIQUOTEITEMS:QI_PRICE\</code>	Price of draft client job.
<code>\DTMULTIQUOTEITEMS:QI_VOLUME\</code>	Volume of draft client job.
<code>\DTMULTIQUOTEITEMS:QI_FEE_KIND\</code>	Type of price set for draft client job (can be per unit, flat fee, or free).
<code>\DTMULTIQUOTEITEMS:QI_TOTAL\</code>	Draft client job total.
<code>\DTMULTIQUOTEITEMS:QI_COUNTNOTES\</code>	CATCount/AnyCount notes of draft client job (if job volume had been entered via CATCount/Anycount).

See also:

[Logic and Syntax of Templates](#)

[Advanced commands and functions](#)

# Client Job Template Variables

<b>Code to paste to template</b>	<b>Information to be displayed in the saved document</b>
<code>\JOB_NAME\</code>	Job name.
<code>\JOB_CODE\ \CODE\ \PO_CODE\ \PO\ \CLIENT_REF\ \SERVICE\ \INSTRUCTIONS\ \WORK_NOTES\ \VOLUME\ \TYPE\ \PRICE\ \UNITS\ \TOTAL\ \ASSIGNED\  \ASSIGNED_LONG\ \LONGASSIGNED\  \DEADLINE\  \DEADLINE_LONG\ \LONGDEADLINE\  \COMPLETED\ \DONE\  \COMPLETED_LONG\ \LONGCOMPLETED\  \COUNT_NOTES\  \INVOICE_CODE\ \INVOICE\  \INVOICE_GLOBAL_CODE\ \INV_GLOBAL\ </code>	Job code.  Purchase order client issued for this job.  Reference number in client's accounting system.  Service name.  Job instructions.  Work notes.  Job volume.  Job type (for example: per unit, flat fee, free)  Job price.  Job units.  Job total.  Date when job was assigned, in the following format: 10/4/2006.  Date when job was assigned, in the following format: Monday, October 04, 2006.  Job deadline, in the following format: 10/4/2006.  Job deadline, in the following format: Monday, October 04, 2006.  Completion date, in the following format: 10/4/2006.  Completion date, in the following format: Monday, October 04, 2006.  CATCount or AnyCount notes.  Invoice code.  Invoice global code.

---

## See also:

[Logic and Syntax of Templates](#)

[Advanced commands and functions](#)

# Corporate Job Template Variables

<b>Code to paste to template</b>	<b>Information to be displayed in the saved document</b>
\CEXPERT_NAME\ 	Name of employee.
\CEXPERT_CODE\ 	Code of employee.
\CEXPERT_EMAIL1\ 	Employee email 1.
\CEXPERT_EMAIL2\ 	Employee email 2.
\CEXPERT_PHONE1\ 	Employee phone number 1.
\CEXPERT_PHONE2\ 	Employee phone number 2.
\CEXPERT_FAX\ 	Employee fax number.
\CEXPERT_AHC\ 	Employee average hourly cost.
\CEXPERT_INFO\ 	Employee information.
\JOB_NAME\ 	Job name.
\JOB_CODE\ 	Job code.
\CLIENT_PO\ 	Purchase order client issued for this job.
\CLIENT_REF\ 	Reference number in client's accounting system.
\JA_CODE\ 	Job Assignment code.
\SERVICE\ 	Service name.
\INSTRUCTIONS\ 	Job instructions.
\WORK_NOTES\ 	Work notes.
\VOLUME\ 	Job volume.
\TYPE\ 	Job type (for example: per unit, flat fee, free)
\AHC\ 	Average hourly cost of the expert the job is assigned to.
\PRICE\ 	Job price.
\UNITS\ 	Job units.
\TOTAL\ 	Job total.
\ASSIGNED\ 	Date job was assigned, in the following format: 10/4/2006.
\ASSIGNED_LONG\ 	Date job was assigned, in the following format: Monday, October 04, 2006.
\DEADLINE\ 	Job deadline, in the following format: 10/4/2006.
\DEADLINE_LONG\ 	Job deadline, in the following format: Monday, October 04, 2006.
\COMPLETED\ 	Completion date, in the following format: 10/4/2006.
\COMPLETED_LONG\ 	Completion date, in the following format: Monday, October 04, 2006.
\TIME_SPENT\ 	Time spent on job completion.
\HOURS_SPENT\ 	Hours spent on job completion.
\MINUTES_SPENT\ 	Minutes spent on job completion.
\COUNT_NOTES\ 	CATCount or AnyCount notes.
\INVOICE_CODE\ 	Invoice code.
\JOB_QUALITY\ 	Quality of completed job (set by project manager).

---

See also:

[Logic and Syntax of Templates](#)

[Advanced commands and functions](#)

# Freelance Job Template Variables

## Code to paste to template

\FEXPERT\_NAME\

\FEXPERT\_CODE\

\FEXPERT\_CURRENCY\

\FEXPERT\_MINFEE\

\FEXPERT\_PAYMENT\_TERMS\

\FEXPERT\_PAYMENT\_TERMS\_NOTES\

\FEXPERT\_ADDRESS\

\FEXPERT\_STREET1\

\FEXPERT\_STREET2\

\FEXPERT\_CITY\

\FEXPERT\_STATE\

\FEXPERT\_COUNTRY\

\FEXPERT\_ZIP\

\FEXPERT\_EMAIL1\

\FEXPERT\_EMAIL2\

\FEXPERT\_PHONE1\

\FEXPERT\_PHONE2\

\FEXPERT\_PHONE3\

\FEXPERT\_PHONE4\

\FEXPERT\_FAX\

\FEXPERT\_WEB\

\FEXPERT\_AINFO\

\FEXPERT\_INFO\

\FEXPERT\_VATNUM\

\JOB\_NAME\

\JOB\_CODE\

\PO\_CODE\

\PO\_GLOBAL\_CODE\

\CLIENT\_REF\

\SERVICE\

\INSTRUCTIONS\

\WORK\_NOTES\

\VOLUME\

\TYPE\

\PRICE\

\PRICING\

\UNITS\

\TOTAL\

\ASSIGNED\

## Information to be displayed in the saved document

Name of freelance expert.

Freelance expert code.

Freelance expert currency.

Freelance expert minimum fee.

Freelance expert payment terms.

Freelance expert payment terms additional notes.

Freelance expert address.

Freelance expert street 1.

Freelance expert street 2.

Freelance expert city.

Freelance expert state.

Freelance expert country.

Freelance expert zip code.

Freelance expert email address.

Freelance expert email address 2.

Freelance expert phone number 1.

Freelance expert phone number 2.

Freelance expert phone number 3.

Freelance expert phone number 4.

Freelance expert fax number 2.

Freelance expert Web site address.

Freelance expert application information.

Freelance expert general information.

Freelance expert VAT number.

Job name.

Job code.

Purchase order client issued for this job.

Purchase order client issued for this job global code.

Reference number in client's accounting system.

Service name.

Job instructions.

Work notes.

Job volume.

Job type (for example: per unit, flat fee, free)

Job price.

Fee type.

Job units.

Job total.

Date job was assigned, in the following format:  
10/4/2006.

<code>\ASSIGNED_LONG\ \LONGASSIGNED\ \DEADLINE\ \DEADLINE_LONG\ \COMPLETED\ \COMPLETED_LONG\ \COUNT_NOTES\ \JA_CODE\ \JOB_QUALITY\  <hr/></code>	<p>Date job was assigned, in the following format: <b>Monday, October 04, 2006.</b></p> <p>Job deadline, in the following format: <b>10/4/2006.</b></p> <p>Job deadline, in the following format: <b>Monday, October 04, 2006.</b></p> <p>Completion date, in the following format: <b>10/4/2006.</b></p> <p>Completion date, in the following format: <b>Monday, October 04, 2006.</b></p> <p>CATCount or AnyCount notes.</p> <p>Job assignment code.</p> <p>Quality of completed job (set by project manager).</p>
--	--

**See also:**

**Logic and Syntax of Templates**

**Advanced commands and functions**

# Invoice Template Variables

## Date and code

<b>Code to paste to template</b>	<b>Information to be displayed in the saved document</b>
<code>\STATUS\</code>	Invoice status <b>Example:</b> Expected within 30 days, Settled 5 days earlier
<code>\DATE_DUE\ \SETTLEMENT_DATE\ \DATE_DUE_LONG\ \SETTLEMENT_LONGDATE\ \DUE_DATELONG\ \INVOICE_DATE\ \INV_DATE\ \INVOICE_DATE_LONG\ \INV_LONGDATE\ \INVOICE_CODE\ \INV_CODE\ \INVOICE_GLOBAL_CODE\ \INV_GLOBAL\ \INV_GLOBALLONG\ \NOTES\ \INVOICE_NOTES\ </code>	Date when invoice is due, in the following format: 10/4/2006  Date when invoice is due, in the following format: Monday, October 04, 2006  Date invoice was sent, in the following format: 10/4/2006  Date invoice was sent, in the following format: Monday, October 04, 2006  Invoice code  Invoice global code  Invoice notes from the <b>Notes</b> tab of the <b>Edit Invoice</b> window

## Invoice totals

<b>Code to paste to template</b>	<b>Information to be displayed in the saved document</b>
<code>\INVOICE_TOTAL\ \INVOICE_TOTAL_BASE\ \JOBS_TOTAL\ \JOBS_TOTAL_BASE\ \NET_JOBS_TOTAL\ \NET_JOBS_TOTAL_BASE\ \VOLUME_BASE\ </code>	Invoice total in client's currency Invoice total in base currency Jobs total in client's currency Jobs total in base currency Jobs total with discounts in client's currency Jobs total with discounts in base currency Jobs total volume in base units

## Taxes

<b>Code to paste to template</b>	<b>Information to be displayed in the saved document</b>
<code>\TAX1\ \TAX1_NAME\ \TAX1_PERCENTS\ \TAX1_VALUE\ \TAX1_VALUE_BASE\ \TAX2\ \TAX2_NAME\ </code>	Indicates if tax 1 has been added; used in algorithms (If tax 1 exists = True, if it doesn't = False) Tax 1 name Tax 1 value in percents Tax 1 value in client's currency Tax 1 value in base currency Used in algorithms (If tax 2 exists = True, if it doesn't = False) Tax 2 name

<code>\TAX2_PERCENTS\</code>	Tax 2 value in percents
<code>\TAX2_VALUE\</code>	Tax 2 value in client's currency
<code>\TAX2_VALUE_BASE\</code>	Tax 2 value in base currency
<code>\TAXES\</code>	Indicates whether the taxes in Tax fields are set; used in algorithms (If any tax is set = True, if they are not = False)
<code>\AFTER_TAX1\</code>	Total in client's currency after Tax 1 is applied
<code>\AFTER_TAX1_BASE\</code>	Total in base currency after Tax 1 is applied

## Discounts

<b>Code to paste to template</b>	<b>Information to be displayed in the saved document</b>
<code>\DISCOUNT1\</code>	Indicates if discount/markup 1 is set; used in algorithms (If discount 1 exists = True, if it does not = False)
<code>\DISCOUNT1_NAME\</code>	Discount 1 name
<code>\DISCOUNT1_PERCENTS\</code>	Discount 1 value in percents
<code>\DISCOUNT1_VALUE\</code>	Discount 1 value in client's currency
<code>\DISCOUNT1_VALUE_BASE\</code>	Discount 1 value in base currency
<code>\DISCOUNT2\</code>	Indicates if discount/markup 2 is set; used in algorithms (If discount 2 exists = True, if it does not = False)
<code>\DISCOUNT2_NAME\</code>	Discount 2 name
<code>\DISCOUNT2_PERCENTS\</code>	Discount 2 value in percents
<code>\DISCOUNT2_VALUE\</code>	Discount 2 value in client's currency
<code>\DISCOUNT2_VALUE_BASE\</code>	Discount 2 value in base currency
<code>\DISCOUNTS\</code>	Indicates if discounts/markups are set; used in algorithms (If any discount is set = True, if there are no = False)
<code>\AFTER_DISCOUNT1\</code>	Total in client's currency after Discount 1 is applied
<code>\AFTER_DISCOUNT1_BASE\</code>	Total in base currency after Discount 1 is applied

## Payment status variables

<b>Code to paste to template</b>	<b>Information to be displayed in the saved document</b>
<code>\INVOICE_DUE\</code>	Balance due in client's currency
<code>\INVOICE_DUE_BASE\</code>	Balance due in base currency
<code>\INVOICE_PAID\</code>	Total payments linked to this invoice in client's currency
<code>\INVOICE_PAID_BASE\</code>	Total payments linked to this invoice in base currency
<code>\INV_IS_PAID\</code>	Used in algorithms (If the invoice is paid = True, if it's not = False)
<code>\BEFORE_ADJUSTMENTS\</code>	Invoice total in client's currency, excluding adjustments
<code>\BEFORE_ADJUSTMENTS_BASE\</code>	Invoice total in base currency, excluding adjustments
<code>\ADJUSTMENTS_VALUE\</code>	Value of the adjustments in client's currency
<code>\ADJUSTMENTS_VALUE_BASE\</code>	Value of the adjustments in base currency
<code>\ADJUSTMENTS_DESCR\</code>	Description of the adjustments
<code>\INVOICE_PAYMETHOD\</code>	Invoice payment method.
<code>\INVOICE_PAYMETHOD_DESCR\</code>	Payment method description.

## Credit note status variables

**Code to paste to template**    **Information to be displayed in the saved document**

<code>\CN_TOTAL\</code>	The total of credit notes linked to this invoice, in the clients currency
<code>\CN_TOTAL_BASE\</code>	The total of credit notes linked to this invoice, in the base currency

## Client Job Variables in Invoice

<b>Code to paste to template</b>	<b>Information to be displayed in the saved document</b>
<code>\DTLINKJOBS:CJOB_PONUMB\</code>	Client PO of the job
<code>\DTLINKJOBS:CJOB_NAME\</code>	Client job name
<code>\DTLINKJOBS:CJOB_ASSIGNED\</code>	Date the client job was assigned
<code>\DTLINKJOBS:CJOB_DEADLINE\</code>	Deadline of client job
<code>\DTLINKJOBS:CJOB_ISCOMPLETED\</code>	Completed (Boolean: True/False)
<code>\DTLINKJOBS:CJOB_COMPLETED\</code>	Date the client job was completed
<code>\DTLINKJOBS:CJOB_PRICE\</code>	Price of client job
<code>\DTLINKJOBS:CJOB_VOLUME\</code>	Client job volume
<code>\DTLINKJOBS:CJOB_FEE_KIND\</code>	Pricing (per unit, flat fee)
<code>\DTLINKJOBS:CJOB_RATE\</code>	Exchange rate
<code>\DTLINKJOBS:CJOB_TOTAL\</code>	Job total in client's currency
<code>\DTLINKJOBS:CJOB_TOTAL_BASE\</code>	Job total in base currency
<code>\DTLINKJOBS:CJOB_INSTRUCTION\</code>	Instructions of client job
<code>\DTLINKJOBS:CJOB_WORKNOTES\</code>	Work notes of client job
<code>\DTLINKJOBS:CJOB_COUNTNOTES\</code>	CATCount notes of client job
<code>\DTLINKJOBS:SERV_NAME\</code>	Service name of client job
<code>\DTLINKJOBS:UNIT_NAME\</code>	Volume units of client job
<code>\DTLINKJOBS:PROJ_NAME\</code>	Project name
<code>\DTLINKJOBS:PROJ_CODE\</code>	Project code of client job
<code>\DTLINKJOBS:CJOB_CODE\</code>	Client job code
<code>\DTLINKJOBS:CJOB_CLCODE\</code>	Client Ref. of the job
<code>\DTLINKJOBS:CCON_NAME\</code>	Client PM of the client job

## Linked Payment Variables

<b>Code to paste to template</b>	<b>Information to be displayed in the saved document</b>
<code>\DTLINKPAYMENTS:CPAYM_CODE\</code>	Linked payment's code
<code>\DTLINKPAYMENTS:CPAYM_DATE\</code>	Linked payment's creation date
<code>\DTLINKPAYMENTS:CPAYM_TOTAL\</code>	Linked payment's total value
<code>\DTLINKPAYMENTS:LINK_SUM\</code>	Part of the payment's value linked to this invoice

## Linked Credit Note Variables

<b>Code to paste to template</b>	<b>Information to be displayed in the saved document</b>
<code>\DTLINKCREDITNOTES:CN_CODE\</code>	Credit Note's code
<code>\DTLINKCREDITNOTES:CN_DATE\</code>	Credit Note's creation date
<code>\DTLINKCREDITNOTES:CN_TOTAL\</code>	Credit Note's total value
<code>\DTLINKCREDITNOTES:CN_ASSIGN_TOTAL\</code>	Credit note's value covered by refunds
<code>\DTLINKCREDITNOTES:BALANCE\</code>	Credit note's value not covered by refunds

`\DTLINKCREDITNOTES:CN_STATUS\`

**Credit Note's status. Has the following values:**

0 - "Closed": the CN's total is subtracted from the invoice's balance.

1 - "Awaiting payment": the Invoice is paid and the CN requires a refund.

2 - "Partially paid": the CN is partially covered by a refund.

3 - "Fully paid": the CN is fully covered by a refund.

---

**See also:**

Logic and Syntax of Templates

Advanced commands and functions

# Payment Template Variables

## Basic payments template variables

<b>Code to paste to template</b>	<b>Information to be displayed in the saved document</b>
<code>\PAYMENT_CODE\ \CODE\ \PAYMENT_DATE\ \PDATE\ \PAYMENT_DATE_LONG\ \PLONGDATE\ \PAYMENT_NOTES\ \TOTAL_PAID\ \TOTAL\ \TOTAL_PAID_BASE\ \PAYMENT_RATE\ \NOT_LINKED\ \LINKED\ \IS_LINKED\ \PAYMENT_NOTES\ \NOTES\ \</code>	<p>Payment code.</p> <p>Date payment was received, in the following format: 10/4/2006</p> <p>Date payment was received, in the following format: Monday, October 04, 2006</p> <p>Notes about payment.</p> <p>Total paid (in client's currency).</p> <p>Total paid (in base currency).</p> <p>Exchange rate.</p> <p>Amount not linked with invoices.</p> <p>Amount linked with invoices.</p> <p>Used in algorithms (If payment is linked with invoice = True, if it's not = False).</p> <p>Payment notes.</p>

## Linked invoice variables

<b>Code to paste to template</b>	<b>Information to be displayed in the saved document</b>
<code>\DTLINKINVOICES:IDATE\ \DTLINKINVOICES:ICODE\ \DTLINKINVOICES:GNUMB\ \DTLINKINVOICES:TOTAL\ \DTLINKINVOICES:OTHER\ \DTLINKINVOICES:ADJUST\ \DTLINKINVOICES:LINKED\ \DTLINKINVOICES:BALANCE\ \DTLINKINVOICES:DATEDUE\ \</code>	<p>Linked invoice date.</p> <p>Linked invoice code.</p> <p>Linked invoice global code.</p> <p>Linked invoice total.</p> <p>The part of the linked invoice total covered by other payments.</p> <p>The sum of the phantom payment of the linked invoice.</p> <p>The part of the current payment total linked to the invoice.</p> <p>Balance Due of the linked invoice.</p> <p>Linked invoice due date.</p>

---

See also:

[Logic and Syntax of Templates](#)

[Advanced commands and functions](#)

# Credit Note Template Variables

## Date and code

**Code to paste to template**    **Information to be displayed in the saved document**

<code>\CN_STATUS\</code>	Credit note status <b>Example:</b> Awaiting payment, Fully paid
<code>\CN_DATE\</code>	Date credit note was sent, in the following format: 10/4/2006
<code>\CN_DATE_LONG\</code>	Date credit note was sent, in the following format: Monday, October 04, 2006
<code>\CN_CODE\</code>	Credit note code

## Credit note totals

**Code to paste to template**    **Information to be displayed in the saved document**

<code>\CN_TOTAL\</code>	Credit note total in client's currency
<code>\CN_SUB_TOTAL\</code>	Credit note total with taxes
<code>\CN_RATE\</code>	Exchange rate into base currency
<code>\CN_TOTAL_BASE\</code>	Credit note total in base currency

## Taxes

**Code to paste to template**    **Information to be displayed in the saved document**

<code>\TAX1\</code>	Indicates if tax 1 has been added; used in algorithms (If tax 1 exists = True, if it doesn't = False)
<code>\TAX1_NAME\</code>	Tax 1 name
<code>\TAX1_PERCENTS\</code>	Tax 1 value in percents
<code>\TAX1_VALUE\</code>	Tax 1 value in client's currency
<code>\TAX1_VALUE_BASE\</code>	Tax 1 value in base currency
<code>\TAX2\</code>	Used in algorithms (If tax 2 exists = True, if it doesn't = False)
<code>\TAX2_NAME\</code>	Tax 2 name
<code>\TAX2_PERCENTS\</code>	Tax 2 value in percents
<code>\TAX2_VALUE\</code>	Tax 2 value in client's currency
<code>\TAX2_VALUE_BASE\</code>	Tax 2 value in base currency
<code>\TAXES\</code>	Indicates whether taxes are set; used in algorithms (If any tax is set = True, if they are not = False)

## Refund status variables

**Code to paste to template**    **Information to be displayed in the saved document**

<code>\CN_DUE\</code>	Balance due in client's currency
<code>\CN_DUE_BASE\</code>	Balance due in base currency
<code>\CN_PAID\</code>	Total refunds linked to this credit note in client's currency
<code>\CN_PAID_BASE\</code>	Total refunds linked to this credit note in base currency

`\CN_IS_PAID\`

Used in algorithms (If the credit note is paid = True, if it's not = False)

## Linked invoice variables

**Code to paste to template**      **Information to be displayed in the saved document**

<code>\INV_DATE\</code>	Date linked invoice was sent, in the following format: 10/4/2006
<code>\INV_CODE\</code>	Linked invoice code
<code>\INV_TOTAL\</code>	Linked invoice total in client's currency

## Linked refund variables

**Code to paste to template**      **Information to be displayed in the saved document**

<code>\DTLINKREFUNDS:CREF_CODE\</code>	Linked refund's Code
<code>\DTLINKREFUNDS:CREF_DATE\</code>	Linked refund's creation date
<code>\DTLINKREFUNDS:CREF_TOTAL\</code>	Linked refund's total value
<code>\DTLINKREFUNDS:LINK_SUM\</code>	Part of the linked refund's value linked to this credit note

---

See also:

[Logic and Syntax of Templates](#)

[Advanced commands and functions](#)

# Refund Template Variables

<b>Code to paste to template</b>	<b>Information to be displayed in the saved document</b>
<code>\REF_CODE\</code>	Refund code.
<code>\REF_DATE\</code>	Date refund was received, in the following format: 10/4/2006
<code>\REF_DATE_LONG\</code>	Date refund was received, in the following format: Monday, October 04, 2006
<code>\REF_NOTES\</code>	Notes about refund.
<code>\TOTAL_PAID\</code>	Total paid (in client's currency).
<code>\TOTAL_PAID_BASE\</code>	Total paid (in base currency).
<code>\REF_RATE\</code>	Exchange rate.
<code>\NOT_LINKED\</code>	Amount not linked with credit notes.
<code>\LINKED\</code>	Amount linked with credit notes.
<code>\IS_LINKED\</code>	Used in algorithms (If refund is linked with credit note = True, if it's not = False).
<code>\REF_NOTES\</code>	Refund notes.

## Linked Credit Note Variables

<b>Code to paste to template</b>	<b>Information to be displayed in the saved document</b>
<code>\dtLinkCNs:ICODE\</code>	The credit note's code
<code>\dtLinkCNs:IDATE\</code>	The credit note's creation date
<code>\dtLinkCNs:TOTAL\</code>	The credit note's total value
<code>\dtLinkCNs:LINKED\</code>	The part of the credit note's total that is linked to this refund
<code>\dtLinkCNs:OTHER\</code>	The part of the credit note's total that is linked to other refunds
<code>\dtLinkCNs:BALANCE\</code>	The part of the credit note's total that is not linked to any refund

---

### See also:

[Logic and Syntax of Templates](#)

[Advanced commands and functions](#)

# PO Template Variables

## Date and code

<b>Code to paste to template</b>	<b>Information to be displayed in the saved document</b>
<code>\STATUS\</code>	PO status (overdue, settled (with date), outstanding and so on.).
<code>\DATE_DUE\</code>	Due date (according to the payment terms)
<code>\DATE_DUE_LONG\</code>	
<code>\PO_DATE\</code>	The date when the PO was issued in the following format: 10/4/2006
<code>\PO_DATE_LONG\</code>	The date when the PO was issued in the long format: Monday, October 04, 2006
<code>\PO_CODE\</code>	PO code
<code>\PO_GLOBAL_CODE\</code>	PO global code

## PO totals

<b>Code to paste to template</b>	<b>Information to be displayed in the saved document</b>
<code>\JOBS_TOTAL\</code>	Jobs total for the jobs included to the PO in freelancer's currency
<code>\NET_JOBS_TOTAL\</code>	Net Jobs Total (Jobs Total after the discounts/markups are applied) in freelancer's currency
<code>\NET_JOBS_TOTAL_BASE\</code>	Net Jobs Total (Jobs Total after the discounts/markups are applied) in base currency
<code>\PO_TOTAL\</code>	PO Total value in freelancer's currency
<code>\PO_TOTAL_BASE\</code>	PO Total value in base currency
<code>\VOLUME_BASE\</code>	PO total volume in base units

## PO taxes

<b>Code to paste to template</b>	<b>Information to be displayed in the saved document</b>
<code>\TAX1\</code>	Indicates if tax 1 has been added; used in algorithms (If tax 1 exists = True, if it doesn't = False)
<code>\TAX1_NAME\</code>	Tax 1 name
<code>\TAX1_PERCENTS\</code>	Tax 1 value in percents
<code>\TAX1_VALUE\</code>	Tax 1 value in freelancer's currency
<code>\TAX1_VALUE_BASE\</code>	Tax 1 value in base currency
<code>\TAX2\</code>	Indicates if tax 2 has been added; used in algorithms (If tax 2 exists = True, if it doesn't = False)
<code>\TAX2_NAME\</code>	Tax 2 name
<code>\TAX2_PERCENTS\</code>	Tax 2 value in percents
<code>\TAX2_VALUE\</code>	Tax 2 value in freelancer's currency
<code>\TAX2_VALUE_BASE\</code>	Tax 2 value in base currency
<code>\TAXES\</code>	Indicates if taxes are set; used in algorithms (If any tax is set = True, if they are not = False)
<code>\AFTER_TAX1\</code>	Total in freelancer's currency after Tax 1 is applied
<code>\AFTER_TAX1_BASE\</code>	Total in base currency after Tax 1 is applied

## PO discounts

<b>Code to paste to template</b>	<b>Information to be displayed in the saved document</b>
<code>\DISCOUNT1\</code>	Indicates if discount/markup 1 is set; used in algorithms (If discount 1 exists = True, if it does

	not = False)
<code>\DISCOUNT1_NAME\</code>	Discount 1 name
<code>\DISCOUNT1_PERCENTS\</code>	Discount 1 value in percents
<code>\DISCOUNT1_VALUE\</code>	Discount 1 value in freelancer's currency
<code>\DISCOUNT1_VALUE_BASE\</code>	Discount 1 value in base currency
<code>\DISCOUNT2\</code>	Indicates if discount/markup 2 is set; used in algorithms (If discount 2 exists = True, if it does not = False)
<code>\DISCOUNT2_NAME\</code>	Discount 2 name
<code>\DISCOUNT2_PERCENTS\</code>	Discount 2 value in percents
<code>\DISCOUNT2_VALUE\</code>	Discount 2 value in freelancer's currency
<code>\DISCOUNT2_VALUE_BASE\</code>	Discount 2 value in base currency
<code>\DISCOUNTS\</code>	Indicates if discounts/markups are set; used in algorithms (If any discount is set = True, if there are no = False)
<code>\AFTER_DISCOUNT1\</code>	Total in freelancer's currency after Discount 1 applied
<code>\AFTER_DISCOUNT1_BASE\</code>	Total in base currency after Discount 1 applied
<code>\NET_JOBS_TOTAL\</code>	Jobs total with discounts in freelancer's currency
<code>\NET_JOBS_TOTAL_BASE\</code>	Jobs total with discounts in base currency

## PO payment status

<b>Code to paste to template</b>	<b>Information to be displayed in the saved document</b>
<code>\PO_DUE\</code>	Balance due in freelancer's currency
<code>\PO_DUE_BASE\</code>	Balance due in base currency
<code>\PO_PAID\</code>	Total payments linked to this PO in freelancer's currency
<code>\PO_PAID_BASE\</code>	Total payments linked to this PO in base currency
<code>\TOTAL_PAID_BASE\</code>	Total payments linked to this PO in base currency
<code>\PAYMENT_RATE\</code>	Exchange rate of a payment
<code>\PO_IS_PAID\</code>	Used in algorithms (If the invoice is paid = True, if it's not = False)
<code>\BEFORE_ADJUSTMENTS\</code>	Invoice total in freelancer's currency, excluding adjustments
<code>\BEFORE_ADJUSTMENTS_BASE\</code>	Invoice total in base currency, excluding adjustments
<code>\ADJUSTMENTS_VALUE\</code>	Value of the adjustments in freelancer's currency
<code>\ADJUSTMENTS_VALUE_BASE\</code>	Value of the adjustments in base currency
<code>\INVOICE_IS_RECEIVED\</code>	Indicates if the invoice from the expert was received; Boolean type: True if the Expert Invoice received option is selected.
<code>\INVOICE_CODE\</code>	The code of the expert's invoice
<code>\INVOICE_DATE\</code>	The date the expert's invoice was received
<code>\INVOICE_DATE_LONG\</code>	The date the expert's invoice was received, in the long format Monday, October 04, 2006
<code>\PO_NOTES\</code>	The text entered on the Notes tab of the New/Edit PO window

## PO jobs variables

<b>Code to paste to template</b>	<b>Information to be displayed in the saved document</b>
<code>\dtLinkJobs:RJOB_NAME\</code>	Name of the job
<code>\dtLinkJobs:RJOB_ASSIGNED\</code>	Date of the job assignment
<code>\dtLinkJobs:RJOB_DEADLINE\</code>	Deadline date of the job

<code>\dtLinkJobs:RJOB_ISCOMPLETED\</code>	Indicates if the job was is completed; Boolean type: True if the job is completed
<code>\dtLinkJobs:RJOB_COMPLETED\</code>	Date of the job completion
<code>\dtLinkJobs:RJOB_PRICE\</code>	Price of the job
<code>\dtLinkJobs:RJOB_VOLUME\</code>	The job volume
<code>\dtLinkJobs:RJOB_FEE_KIND\</code>	Fee type for the job
<code>\dtLinkJobs:RJOB_RATE\</code>	Exchange rate between expert's and base currency
<code>\dtLinkJobs:RJOB_TOTAL\</code>	Job total in freelancer's currency
<code>\dtLinkJobs:RJOB_TOTAL_BASE\</code>	Job total, in base currency
<code>\dtLinkJobs:RJOB_QUALITY\</code>	Job quality, as specified in the <b>New/Edit</b> Job window
<code>\dtLinkJobs:RJOB_INSTRUCTION\</code>	Text entered on the <b>Instructions</b> tab of the <b>New/Edit</b> Job window
<code>\dtLinkJobs:RJOB_WORKNOTES\</code>	Text entered on the <b>Work Notes</b> tab of the <b>New/Edit</b> Job window
<code>\dtLinkJobs:RJOB_COUNTNOTES\</code>	Text from the <b>Count Notes</b> tab of the <b>New/Edit</b> Job window
<code>\dtLinkJobs:GROUP_NAME\</code>	The job's group of service name
<code>\dtLinkJobs:SERV_NAME\</code>	The job's service name
<code>\dtLinkJobs:UNIT_NAME\</code>	The units the job is measured in.
<code>\dtLinkJobs:PROJ_CODE\</code>	The code of the project the job belongs to.
<code>\dtLinkJobs:RJOB_CODE\</code>	Job code

## Payment PO variables

### Code to paste to template

`\dtLinkPayments:LINK_SUM\`  
`\dtLinkPayments:PAYM_DATE\`  
`\dtLinkPayments:RPAYM_TOTAL\`  
`\dtLinkPayments:RPAYM_CODE\`

### Information to be displayed in the saved document

The amount linked with the PO  
Payment date  
Payment total value  
Payment code

---

### See also:

[Logic and Syntax of Templates](#)

[Advanced commands and functions](#)

# JA Template Variables

## Date and code

<b>Code to paste to template</b>	<b>Information to be displayed in the saved document</b>
<code>\JA_DATE\</code>	The date when the JA was issued, in the following format: 10/4/2006
<code>\JA_DATE_LONG\</code>	The date when the JA was issued, in the long format: Monday, October 04, 2006
<code>\JA_CODE\</code>	JA code

## JA totals

<b>Code to paste to template</b>	<b>Information to be displayed in the saved document</b>
<code>\JOBS_TOTAL\</code>	Jobs total for the jobs included in the JA in expert's currency
<code>\JA_TOTAL\</code>	JA Total value in expert's currency
<code>\JA_TOTAL_BASE\</code>	JA Total value in base currency
<code>\VOLUME_BASE\</code>	JA total volume in base units

## JA payment status

<b>Code to paste to template</b>	<b>Information to be displayed in the saved document</b>
<code>\JA_DUE\</code>	Balance due in expert's currency
<code>\JA_DUE_BASE\</code>	Balance due in base currency
<code>\JA_PAID\</code>	Total payments linked to this JA in expert's currency
<code>\JA_PAID_BASE\</code>	Total payments linked to this JA in base currency
<code>\TOTAL_PAID_BASE\</code>	Total payments linked to this JA in base currency
<code>\PAYMENT_RATE\</code>	Exchange rate of a payment
<code>\JA_IS_PAID\</code>	Used in algorithms (If the invoice is paid = True, if it's not = False)
<code>\JA_NOTES\</code>	The text entered on the Notes tab of the New/Edit JA window

## JA jobs variables

<b>Code to paste to template</b>	<b>Information to be displayed in the saved document</b>
<code>\dtLinkJobs:EJOB_NAME\</code>	Name of the job
<code>\dtLinkJobs:EJOB_ASSIGNED\</code>	Date of the job assignment
<code>\dtLinkJobs:EJOB_DEADLINE\</code>	Deadline date of the job
<code>\dtLinkJobs:EJOB_ISCOMPLETED\</code>	Indicates if the job was is completed; Boolean type: True if the job is completed
<code>\dtLinkJobs:EJOB_COMPLETED\</code>	Date of the job completion
<code>\dtLinkJobs:EJOB_PRICE\</code>	Price of the job
<code>\dtLinkJobs:EJOB_VOLUME\</code>	The job volume
<code>\dtLinkJobs:EJOB_FEE_KIND\</code>	Fee type for the job
<code>\dtLinkJobs:EJOB_RATE\</code>	Exchange rate between expert's and base currency
<code>\dtLinkJobs:EJOB_TOTAL\</code>	Job total in expert's currency
<code>\dtLinkJobs:EJOB_TOTAL_BASE\</code>	Job total, in base currency
<code>\dtLinkJobs:EJOB_QUALITY\</code>	Job quality, as specified in the <b>New/Edit</b> Job window
<code>\dtLinkJobs:EJOB_INSTRUCTION\</code>	Text entered on the <b>Instructions</b> tab of the <b>New/Edit</b> Job window

<code>\dtLinkJobs:EJOB_WORKNOTES\</code>	Text entered on the <b>Work Notes</b> tab of the <b>New/Edit</b> Job window
<code>\dtLinkJobs:EJOB_COUNTNOTES\</code>	Text from the <b>Count Notes</b> tab of the <b>New/Edit</b> Job window
<code>\dtLinkJobs:GROUP_NAME\</code>	The job's group of service name
<code>\dtLinkJobs:SERV_NAME\</code>	The job's service name
<code>\dtLinkJobs:UNIT_NAME\</code>	The units the job is measured in.
<code>\dtLinkJobs:PROJ_CODE\</code>	The code of the project the job belongs to.
<code>\dtLinkJobs:EJOB_CODE\</code>	Job code

## Payment JA variables

### Code to paste to template

`\dtLinkPayments:LINK_SUM\`  
`\dtLinkPayments:PAYM_DATE\`  
`\dtLinkPayments:EPAYM_TOTAL\`  
`\dtLinkPayments:EPAYM_CODE\`

### Information to be displayed in the saved document

The amount linked with the JA  
Payment date  
Payment total value  
Payment code

---

See also:

[Logic and Syntax of Templates](#)

[Advanced commands and functions](#)

# Custom Queries

With administrative access rights, SQL queries can be made directly to the Projetex database. This feature is recommended for system administrators and IT specialists since it requires basic knowledge of SQL.

Structured Query Language (SQL) is a language of structured requests. It is intended for working with relational databases, which constitute the sets of interrelated data, stored in tables.

Nowadays SQL is a part of a large number of programs, executed on various types of computers. "Owing to its elegance and machine independence, as well as to the industrial leaders support in relational base technology, SQL was acknowledged the standard language and will keep this position in the foreseeable future." [2000, Mastering SQL, Martin Grubber]

Custom queries can be accessed in the **Queries** section of the **Corporate Settings** tab in *Projetex Server Administrator*.

The screenshot shows the Projetex Server Administrator interface. At the top, there are three tabs: "Database Server", "Database", and "Corporate Settings". The "Corporate Settings" tab is active. On the left side, there is a navigation pane with four items: "Folders", "Fields", "Queries" (which is highlighted with a blue selection bar), and "Reports". The main area is divided into two sections. The top section is a list of queries with the following entries: "Client Jobs", "Client Jobs (with Model)", "Clients - Contacts", "Clients - Invoices", "Clients - Invoices (with Model)", "Clients - Payments", "Clients - Prices", "Clients with custom fields (with Model)", "Corporate Experts - JAs", "Corporate Experts - Jobs", "Corporate Experts with custom fields (with Model)", "Custom Queries (with Model)", and "Custom Reports (with Model)". The "Client Jobs" query is selected. Below the list is a "Description:" field containing the text: "Client Jobs Query. Uses links with Invoices, Projects, Services, Units, Currencies, Clients, Project Managers tables." To the right of the list and description are several action buttons: "New", "Edit", "Delete", "Export Data", "Print Data", "Load", and "Save".

---

See also:

[Queries](#)

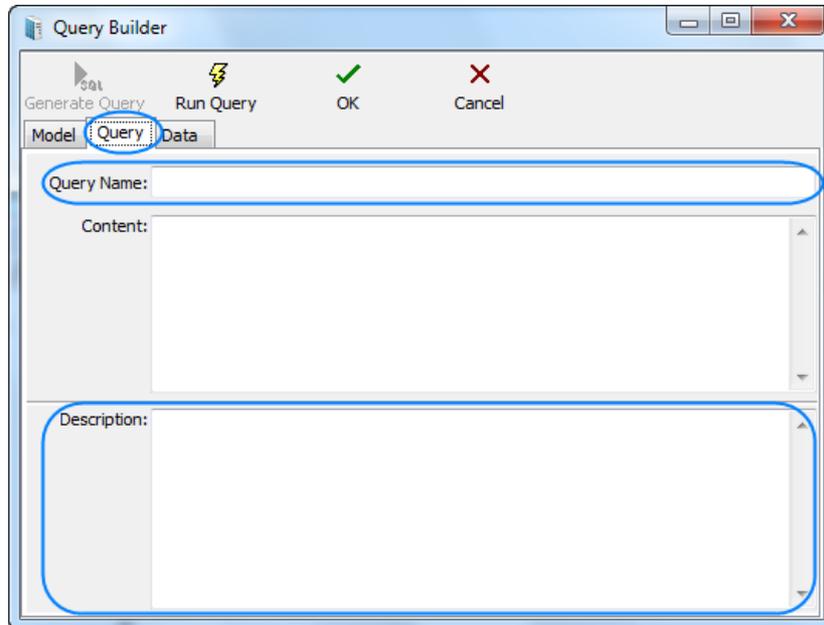
[Query Building Tutorial](#)

# Query Building Tutorial

User queries are built and managed in the **Queries** section of **Corporate Settings** tab of the Projextex Server Administrator.

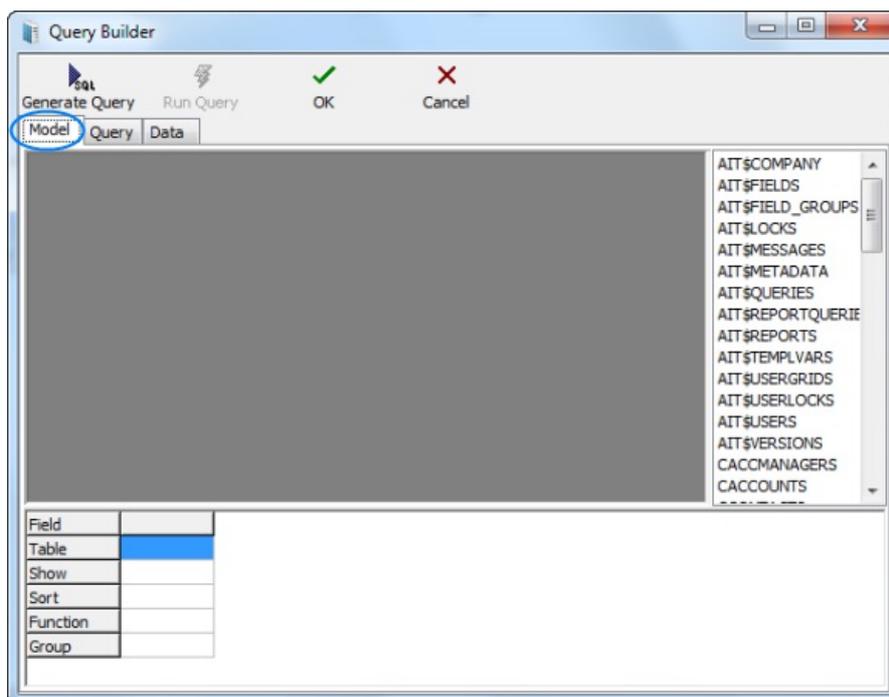
## 1. Beginning query creation

Click the **New** button and the **Query Builder** window shown below will appear. Enter the name of your query in the **Query Name** field, and (optionally) the description of the new query in the **Description** field.



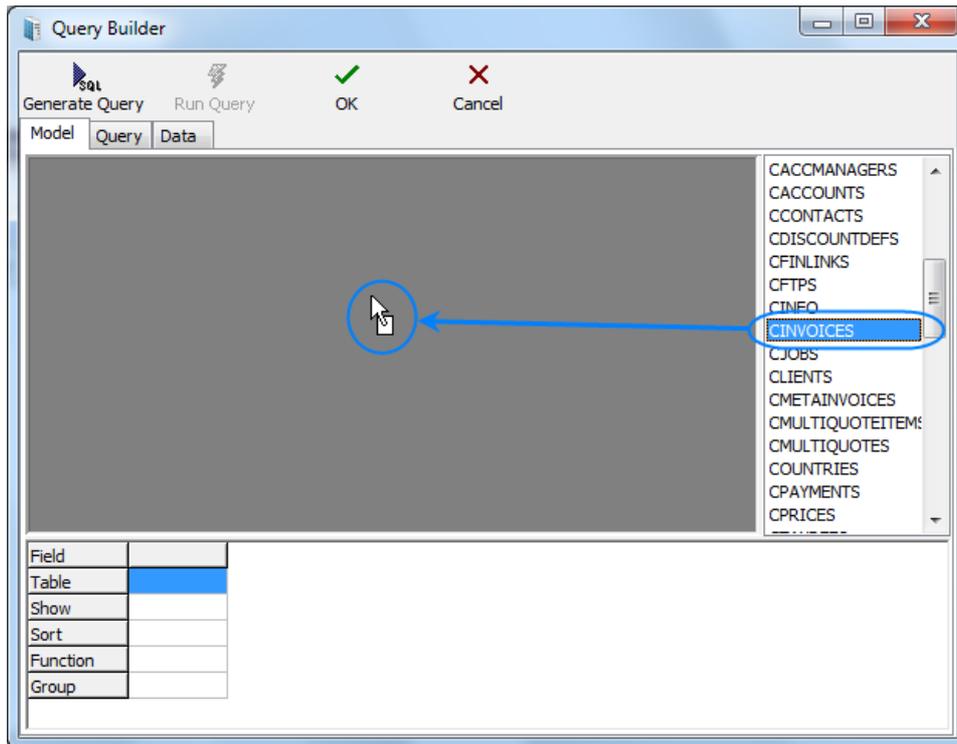
## 2. Beginning creating the model of the query

Switch to the **Model** tab:



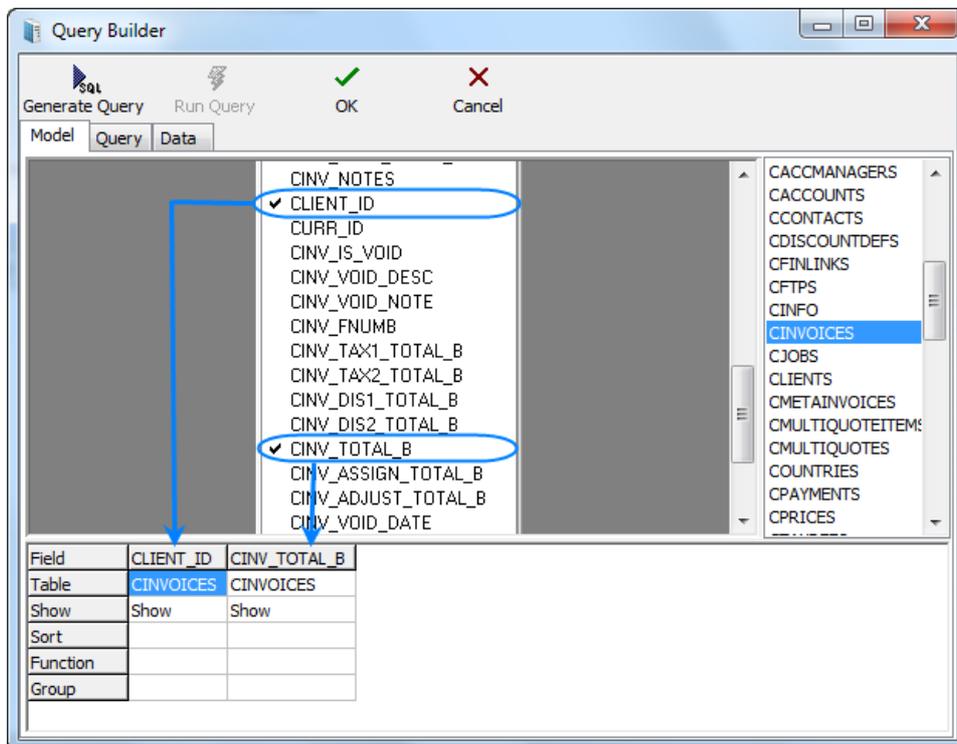
## 3. Selecting database tables

Locate the required tables on the list to the right (in this case — *CINVOICES* table) and drag them to the gray field of the **Model** tab of **Query Builder** window.



#### 4. Selecting fields to be added to query

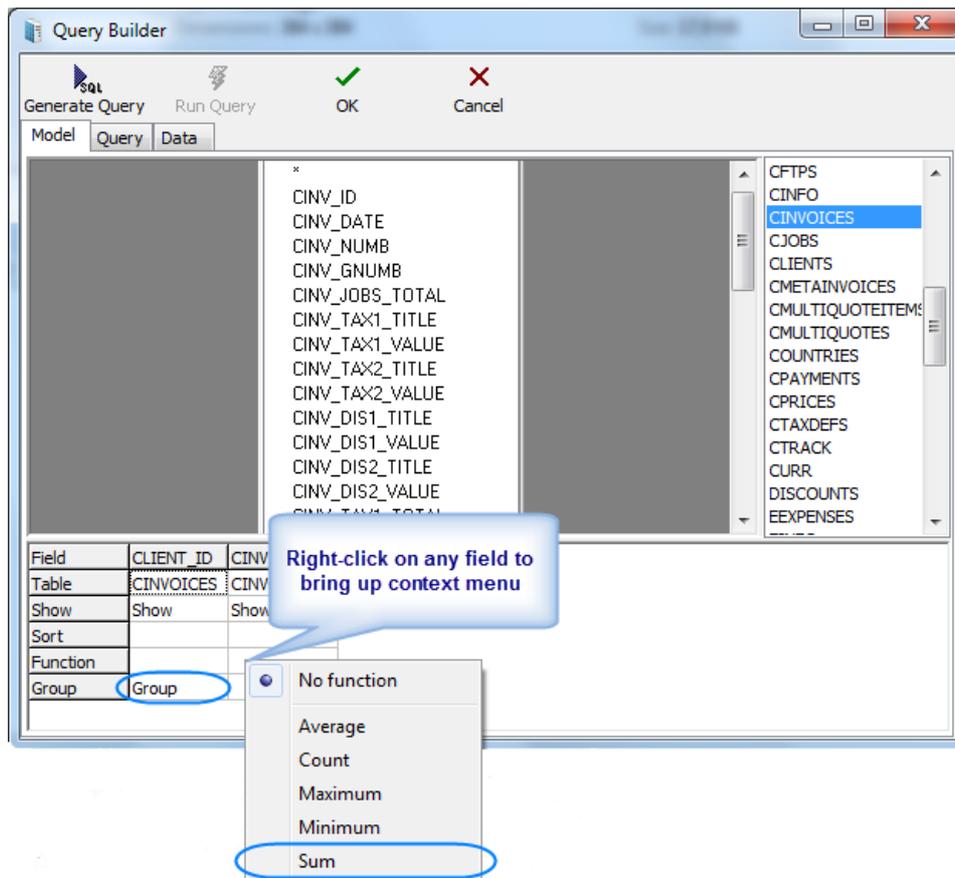
Select two fields, (in this case *CLIENT\_ID* and *CINV\_TOTAL\_B* — client ID and sum of the invoice in basic currency) by clicking near their names in the table windows. These fields will appear in the lower area, which represents the list of selected fields.



#### 5. Assigning functions

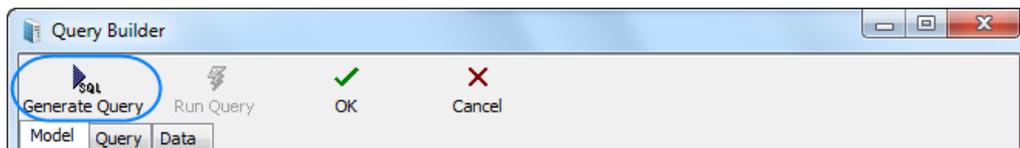
Right-click on the cell where fields *CLIENT\_ID* (the selected field) and *GROUP* (SQL section Group by) intersect and select the

Group option. Similarly in the cell of intersecting CINV\_TOTAL\_B and Function fields we select the Sum option:

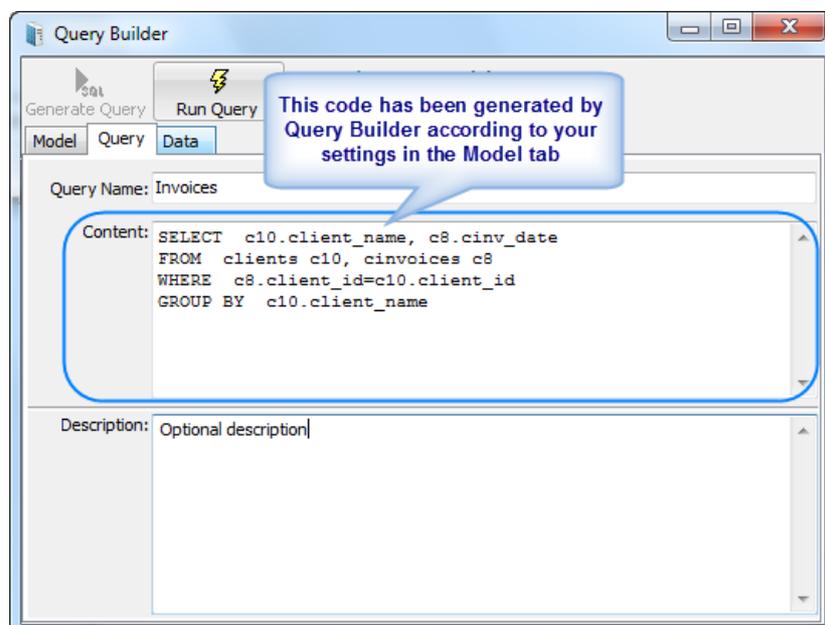


## 6. Generating query

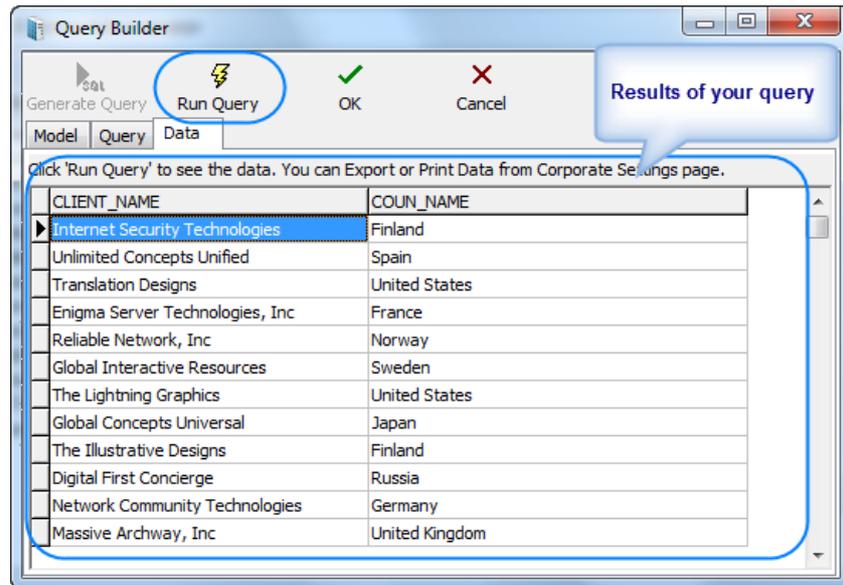
Click the Generate Query button.



The newly built SQL-query will appear.



Start executing the query (click the **Run Query** button from the toolbar in the upper part of the window) and you will see the results.



**Note:** Although for most basic queries you are not required to write the SQL code of the query manually, any additional code can be added by SQL-versed users to fully customize their queries.

#### Example:

The following strings can be added to this particular query:

```
SELECT FIRST 10 c4.client_id, SUM(c4.cinv_total_b),  
(select client_name from clients where client_id = c4.client_id)  
FROM cinvoices c4  
GROUP BY c4.client_id  
ORDER BY 2 DESC
```

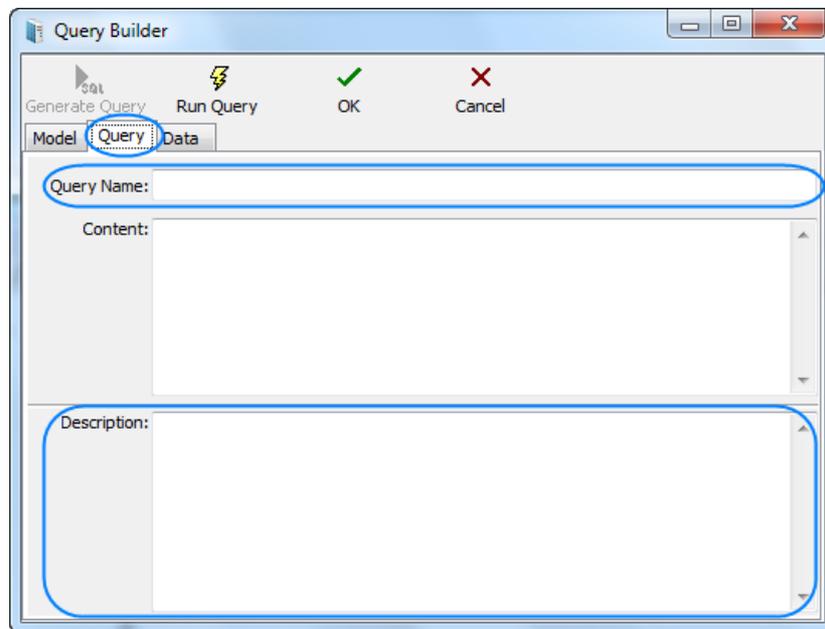
In simple words it will mean the following: To select first ten clients (first 10 client\_id) by counting the sum of invoices and display them in the order of sum reduction (ORDER BY 2 DESC).

Click the **Run Query** button once again to see the new result.

**Note:** If you click **Generate SQL** after editing the query manually the query will be rebuilt and the results of your work will be lost.

## 7. Saving newly created query

To save the query model switch to the **Query** tab, specify the **Query Name** and **Description** (optionally) and click **OK**.



---

See also:

Example: Single Table Query

Example: Linking Tables

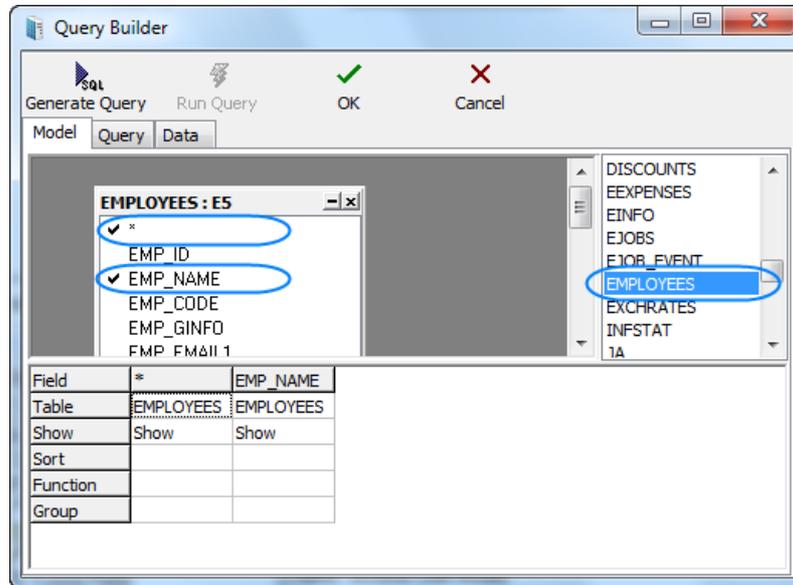
Example: Using Functions in Queries

# Example: Single Table Query

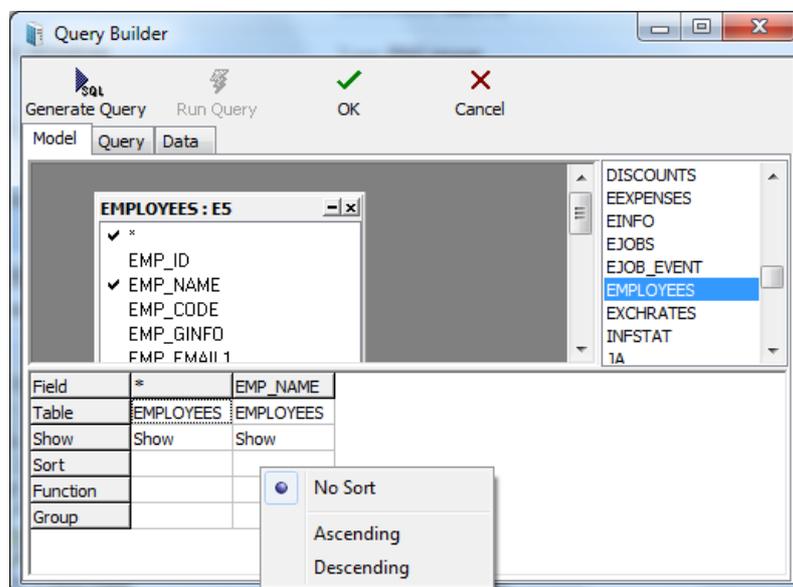
Objective: Get the list of corporate experts with all data sorted by experts' names.

1. Drag & drop the EMPLOYEES table at the working area.

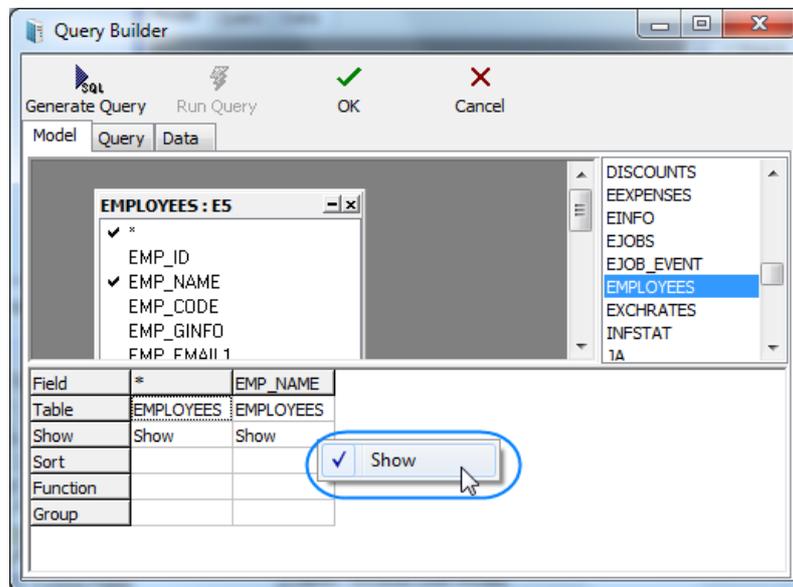
2. Select the asterisk "\*" (to display all table fields) and the field EMP\_NAME (needed for sorting). After performing these actions we can see the following picture under the model working area:



3. In order to sort data by corporate expert names you need to right-click the cell where the EMP\_NAME column and the Sort row intersect, and choose the sorting type:

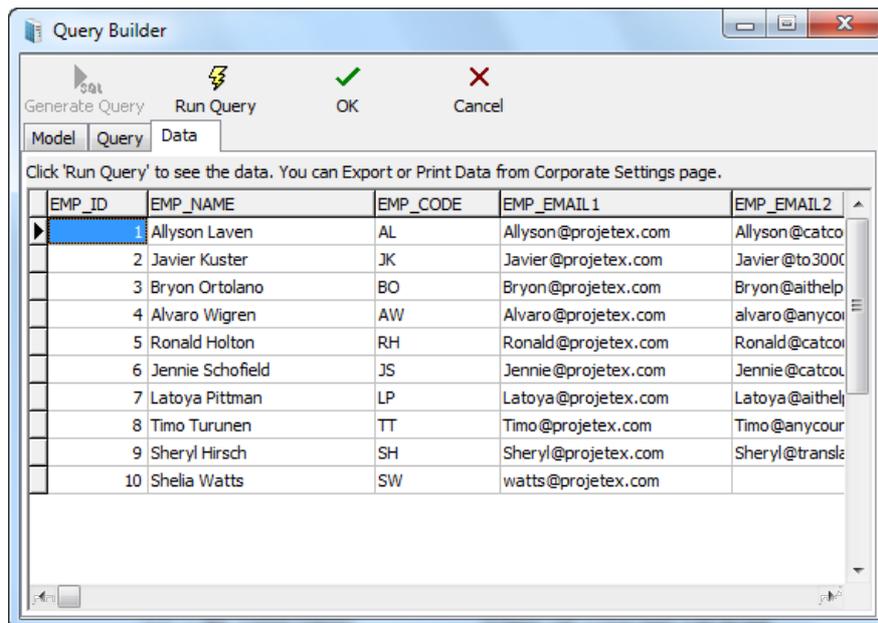


4. The EMP\_NAME field will be displayed twice in the results of this given model. To avoid this problem, right-click the cell where the EMP\_NAME column and the Show row intersect and clear the Show option.



5. Click the **Generate Query** button to generate and see the SQL code. The generated request will be located in the **Content** field on the **Query** tab.

6. You can view results by clicking the **Run Query** button. You will get a table with a list of all the **Corporate Experts** and their data including service data.



7. To save the request model switch to the **Query** tab, specify the **Query Name** and **Description** (optionally) and click **OK**.

**Note:** You can export or print these data from the **Queries** tab of the Server Administrator **Corporate Settings** (using **Export Data** and **Print Data** buttons) (the query should be saved as described in the previous paragraph).

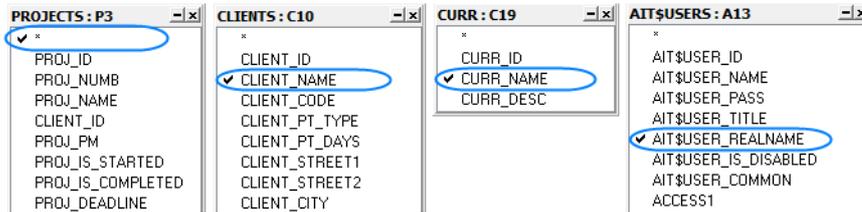
See also:

[Query Building Tutorial](#)

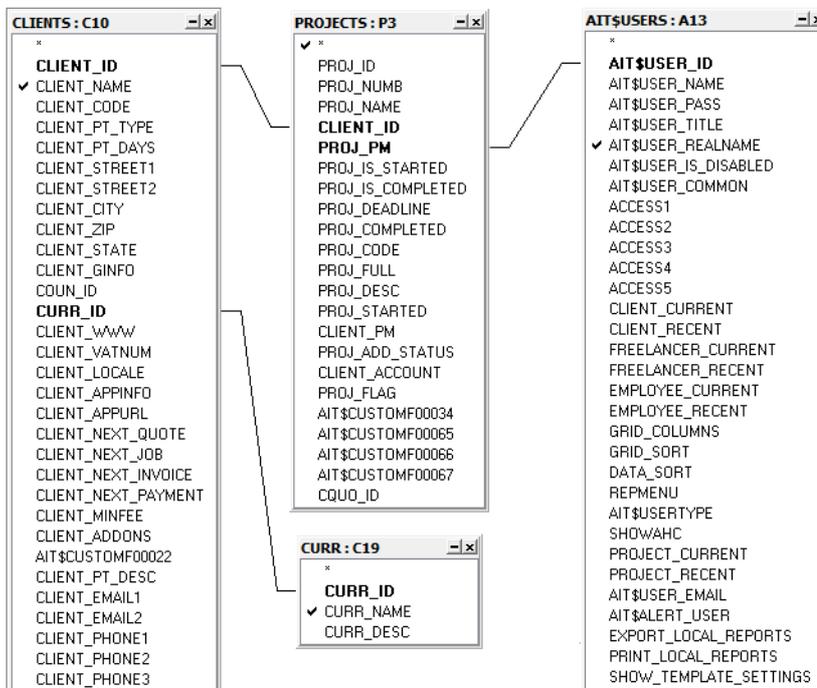
# Example: Linking Tables

Objective: Get a list of all the projects with all their data sorted by expert names, with client, project manager name and currency names.

1. Drag & drop the PROJECTS, CLIENTS, CURR and AIT\$USERS tables to the working area. In the PROJECTS table select "\*" field (to display all table fields); select the CLIENT\_NAME field in the CLIENTS table, the CURR\_NAME field in the CURR table and the AIT\$USER\_REALNAME field in the AIT\$USERS table.



2. In order to get the name of the client the project is assigned to, you need to set up a connection between the PROJECTS and CLIENTS tables by the unique field CLIENT\_ID: click and hold the left mouse button on the CLIENT\_ID field in the PROJECTS field, drag it to the CLIENT\_ID field in the CLIENTS table, and release the button. Similarly you need to connect the tables CLIENTS and CURR by the unique CURR\_ID field, the PROJ\_PM field of the PROJECTS table and the AIT\$USER\_ID field of the AIT\$USERS table. As a result you get the following:



3. After the request model has been created, click the **Generate Query** button. The SQL code of the request will be generated and displayed in the **Content** field on the **Query** tab.

4. You can view the results by clicking the **Run Query** button: you will get a table with a list of all the projects and their data including service data.

Query Builder

Generate Query Run Query OK Cancel

Model Query Data

Click 'Run Query' to see the data. You can Export or Print Data from Corporate Settings page.

CLIENT_NAME	AIT\$USER_REALNAME	CURR_NAME	PROJ_NUMB	PROJ_CODE	PROJ_NAME	PROJ_PM	PROJ_IS_STARTED	PROJ_IS_COMPLETED	PROJ_D
Internet Security Technologies	William McSun	EUR	35	0035	SSH technology	-1	True	True	07.03.2
Internet Security Technologies	Fernando Lucena	EUR	36	0036	Training Schedule	6	True	True	03.04.2
Unlimited Concepts Unified	William McSun	USD	44	0044	UCU web-site localization	-1	True	False	22.06.2
Unlimited Concepts Unified	William McSun	USD	45	0045	Booklet about Unlimited Concepts Unified	-1	True	False	13.06.2
Translation Designs	William McSun	USD	48	0048	Localization of internal CRM system	-1	True	False	14.08.2
Translation Designs	William McSun	USD	49	0049	CRM system guide	-1	True	False	02.05.2
Enigma Server Technologies, Inc	William McSun	EUR	37	0037	Server-client technology specification	-1	True	True	21.05.2
Enigma Server Technologies, Inc	William McSun	EUR	50	0050	Proofread www.enigmaservertech.com	-1	True	False	17.08.2
Reliable Network, Inc	Bartholomeo Rodrigues	EUR	23	0023	VPN connection troubleshooting	8	True	False	16.06.2
Reliable Network, Inc	William McSun	EUR	51	0051	Virtual Private Network Scheme	-1	True	False	11.11.2
Global Interactive Resources	William McSun	EUR	52	0052	GlobalSYS manual (consulting only)	-1	True	False	21.08.2
Global Interactive Resources	William McSun	EUR	53	0053	Web-site content review	-1	True	False	23.06.2
The Lightning Graphics	William McSun	USD	19	0019	Marketing booklet	-1	True	True	18.09.2
The Lightning Graphics	Bartholomeo Rodrigues	USD	32	0032	Thermal Displacement Guide	8	True	False	05.06.2
The Lightning Graphics	Fernando Lucena	USD	34	0034	Norby workshop	6	True	True	16.12.2
Global Concepts Universal	William McSun	JPY	27	0027	Tax policy in EU	-1	True	False	21.06.2
Global Concepts Universal	Fernando Lucena	JPY	31	0031	Virtual Reduction Engine	6	True	False	16.07.2

5. To save the request model switch to the **Query** tab, specify the query name and description (optionally) and click **OK** button.

 **Note:** You can export or print this data from the **Queries** tab of the Server Administrator **Corporate Settings** (using the **Export Data** and **Print Data** buttons) (the query should be saved as described in the previous paragraph).

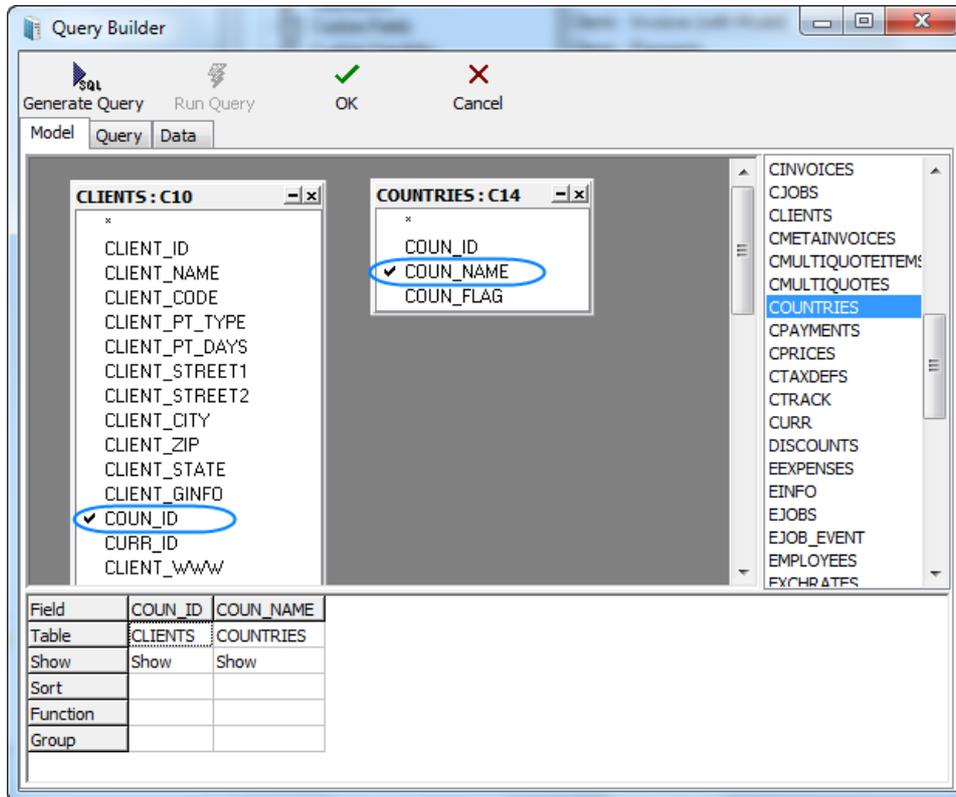
See also:

Query Building Tutorial

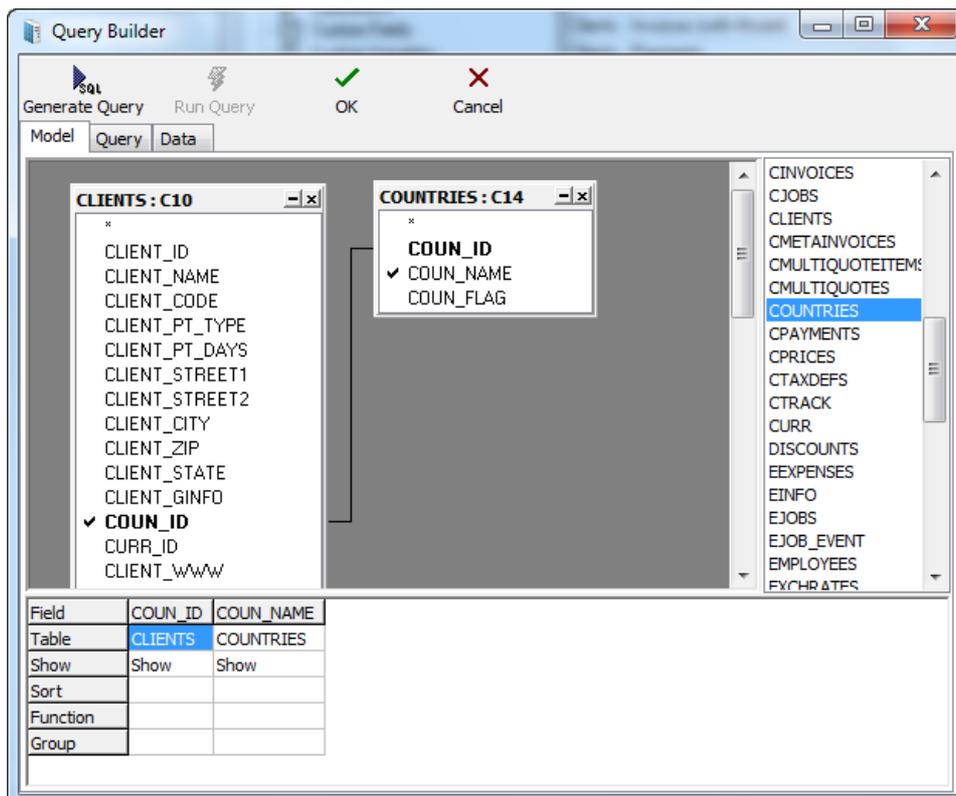
# Example: Using Functions in Queries

Objective: Get statistics on clients by countries (i.e. the number of clients from each country).

1. Drag & drop the tables CLIENTS and COUNTRIES to the working area. In the CLIENTS table check the COUN\_ID field, and also the COUN\_NAME field in the COUNTRIES table.



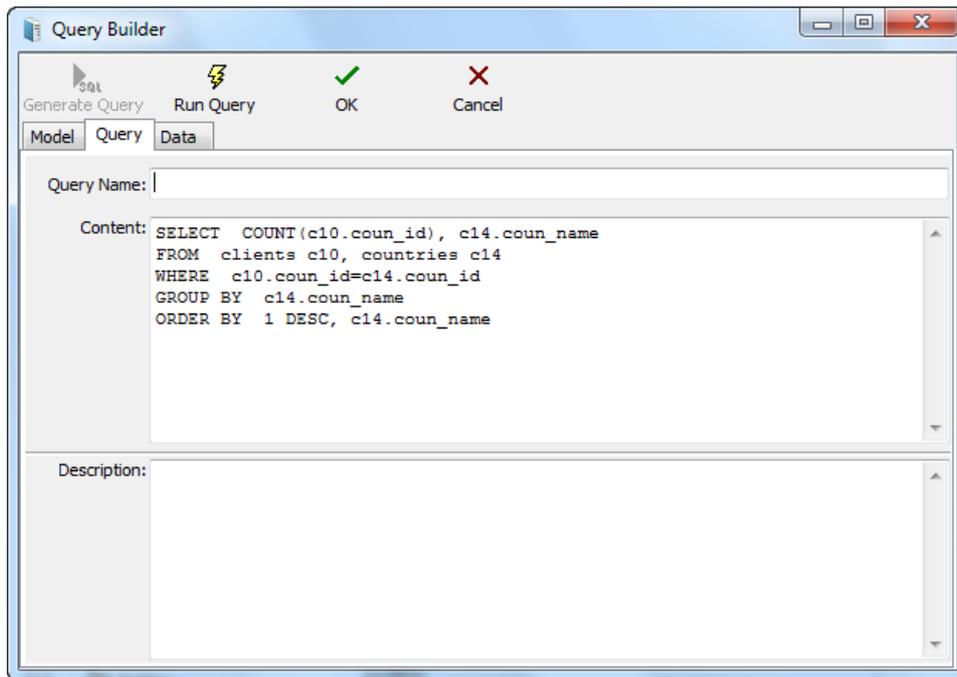
2. Set the connection between the tables CLIENTS and COUNTRIES by the unique field COUN\_ID: click and hold left mouse button on the COUN\_ID field in the CLIENTS table, drag it to the COUN\_ID field in the COUNTRIES table, and release the button. As a result you get the following:



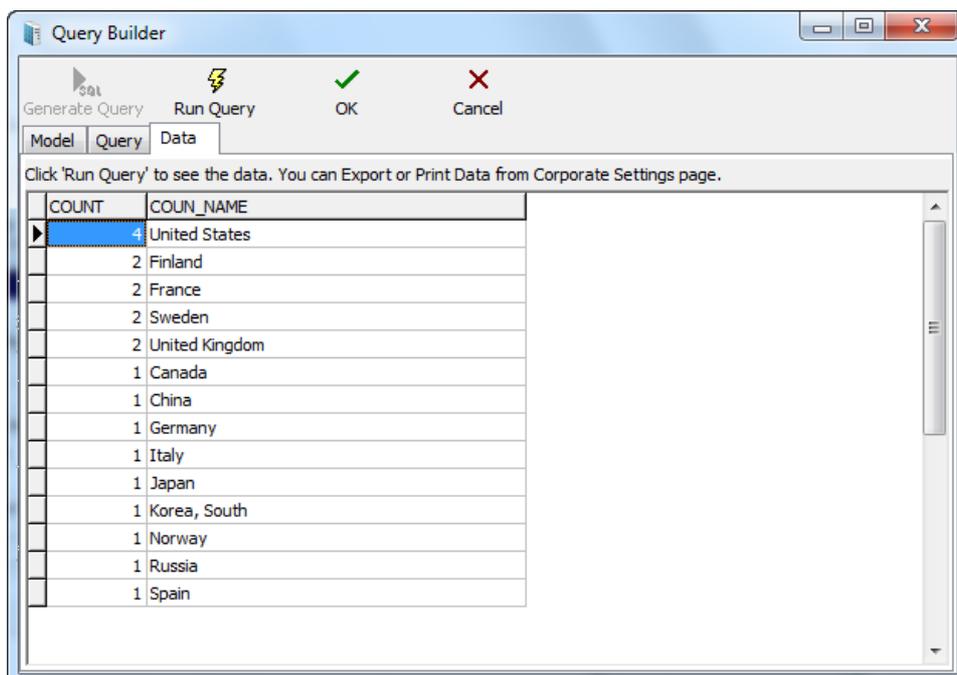
3. Now you need to specify the selection conditions. Set the necessary sorting order: number of countries (in the CLIENTS table) — descending, names of the countries — ascending). For the COUN\_ID field choose the Count function, and also set grouping by country name:

Field	COUN_ID	COUN_NAME
Table	CLIENTS	COUNTRIES
Show	Show	Show
Sort	Desc	Asc
Function	Count	
Group		Group

4. After the request model was created, click the **Generate Query** button. The SQL code of the request will be generated and displayed in the **Content** field of the **Query** tab.



5. You can view the results by clicking the **Run Query** button. You will get the table with countries rating according to the number of your clients from each country. For example:



6. To save the request model switch to the **Query** tab, specify the **Query Name** and **Description** (optionally) and click **OK**.

 **Note:** You can export or print these data from the **Queries** tab of the Server Administrator **Corporate Settings** (using the **Export Data** and **Print Data** buttons) (the query should be saved as described in the previous paragraph).

---

See also:

[Query Building Tutorial](#)

# Using Custom Reports

Custom reports are used to extract and view consolidated and summary printable information from Projetex database. Custom reports can be viewed, exported and printed from the Projetex Workstation window.

To access custom reports, click on **Reports** in the Navigation Bar.

Dashboard Workspace Calendar Reports Knowledgebase

---

See also:

[Static Reports](#)

[Dynamic Reports](#)

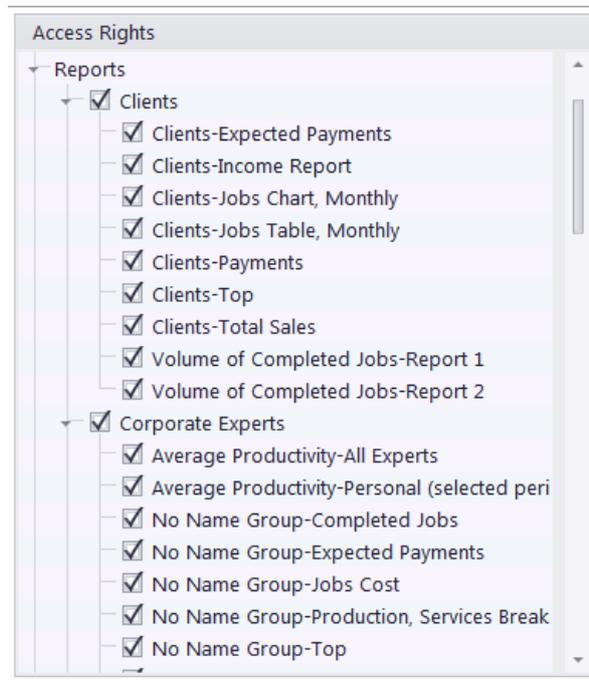
[Access to custom reports](#)

[Managing custom reports](#)

# Access to custom reports

Access to custom reports can be granted or denied for any Projetex user with the help of Administrator settings.

1. Enter the Backstage View in Projetex Workstation with an Administrator account.
2. Click **Administrator**.
3. Click the **Users and Access** section, select the required user in the list and click the **Edit** button.
4. In the **Edit User** window select or clear various reports in the Reports section of the Access Rights tree.



---

See also:

[Managing custom reports](#)

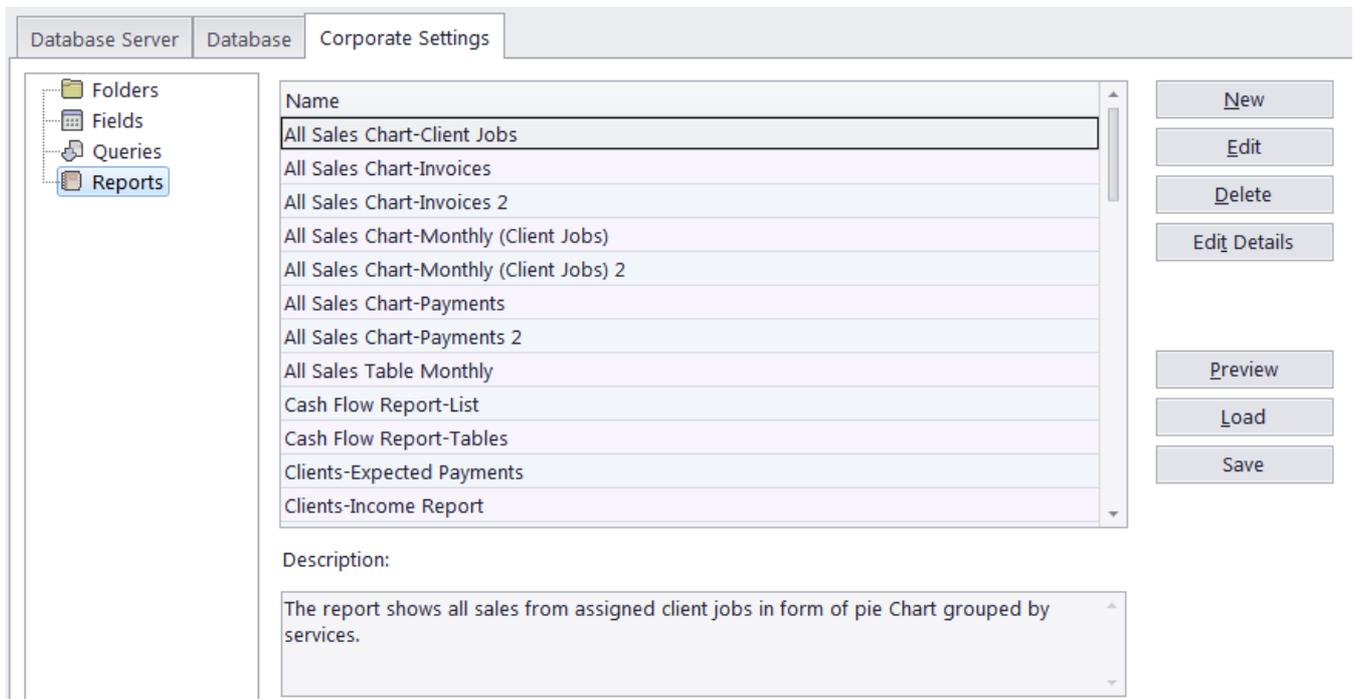
# Managing custom reports

## Custom Reports settings in Projetex Server Administrator

Custom reports can be created edited and deleted in the Projetex Server Administrator.

To create, edit or delete custom reports open **Reports** section of Projetex Server Administrator **Corporate Settings** tab.

1. Run Projetex Server Administrator.
2. Click **Database** tab and switch the database into offline mode.
3. Click **Corporate Settings** >> **Reports** section to open custom report management options.



## Exporting a custom report

To export a custom report, save the required report in a .PX15 file. This file can later be imported into another Projetex database.

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

## Importing a custom report

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

**Note:** Custom reports which are displayed in the **Custom Reports** section of the Projetex Server Administrator are the ones currently integrated into the database. *PX15* files are used solely for export-import purposes, simply copying a new *PX15* file to `\AIT\Projetex 3D\Projetex Server\Reports\` will not import the new report into the database.

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

1. Save the *PX15* file being imported to the `\AIT\Projetex 3D\Projetex Server\Reports\` folder.
2. Click the **Load** button.
3. Locate the *PX15* file being imported, select it and click the **Open** button.

## Editing a custom report

To make changes to a custom report, select this report in the list and click the **Edit** button. This button opens **FastReport** (report designer interface). The FastReport designer is a complex tool intended for IT specialists. It requires some basic *SQL* knowledge. Step-by-step creation of simpler reports is described in the *Creating a custom report* topic.

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

---

See also:

[Using Custom Reports](#)

[Creating A Custom Report](#)

[Creating a Master-Detail Report](#)

# Creating A Custom Report

This topic will cover the process of creating a simple custom report.

 **Note:** This is a sample of FastReport engine functionality intended for users generally unfamiliar with SQL. For SQL-versed users it is recommended to refer to FastReport manual available for download on <http://www.projex.com/documentation>

## Creating A Custom Report

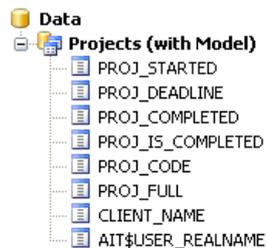
1. Run the Projex Server Administrator, turn the database offline and switch to the **Corporate Settings** tab.
2. Click **Custom Reports** on the **Corporate Settings** tab of the Projex Server Administrator.
3. Click the **New** button; enter the report name and description in the **New Custom Report** window and click **OK**.
4. Add data which should be used in the report. To do so, on the **Report** menu click **Data** in the **FastReport Designer** window (it will open automatically, once you click the **OK** button).

This will open the **Select Project Datasets** dialog window, in which all your custom queries are displayed. Select the required queries by selecting the check boxes in front of their names. For this example we selected the **Projects (with Model)** query, since we are composing a "Projects report".

Click **OK** to confirm selection.

 **Note:** You can create your own custom queries with the help of the built-in query builder. Any custom queries created this way will appear in this dialog window.

5. Now, the contents of the selected query are displayed in the **Data** field to the right:

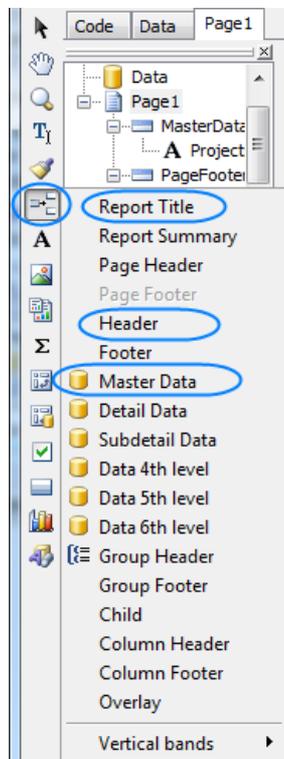


These are the fields from the Projex database, which have been added to the query you selected. In this particular case, the fields are those containing project names (*PROJ\_FULL*) and codes (*PROJ\_CODE*), dates of the project timeline (*PROJ\_STARTED*, *PROJ\_DEADLINE* and *PROJ\_COMPLETED*), information as to whether the project has been completed or not (*PROJ\_IS\_COMPLETED*) and corresponding client names (*CLIENT\_NAME*).

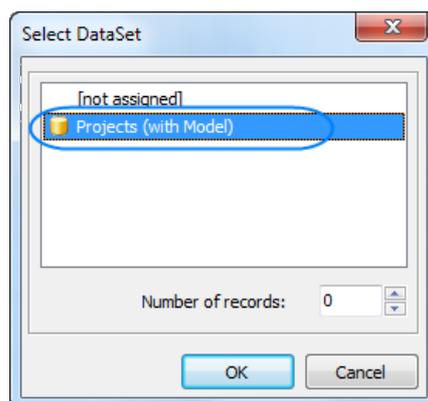
6. Begin designing your report by placing **Data Bands**.

These "bands" bind the report elements together, specifying their location on the page relatively to the page itself and to the other bands. A more detailed description of the bands can be found in the FastReport User Manual. For this particular report you will need to use only a few of the bands available.

- 6.1. Click the **Insert Band** button and select the **Report Title** band. This will place the band into your report page. Click **Insert Band** again and select **Header band** to place it.



6.2. Click the **Insert Band** button one more time and select the **Master Data** band to place it in your report. When placing the **Master Data** band select your **Projects (with Model)** query when prompted to do so:



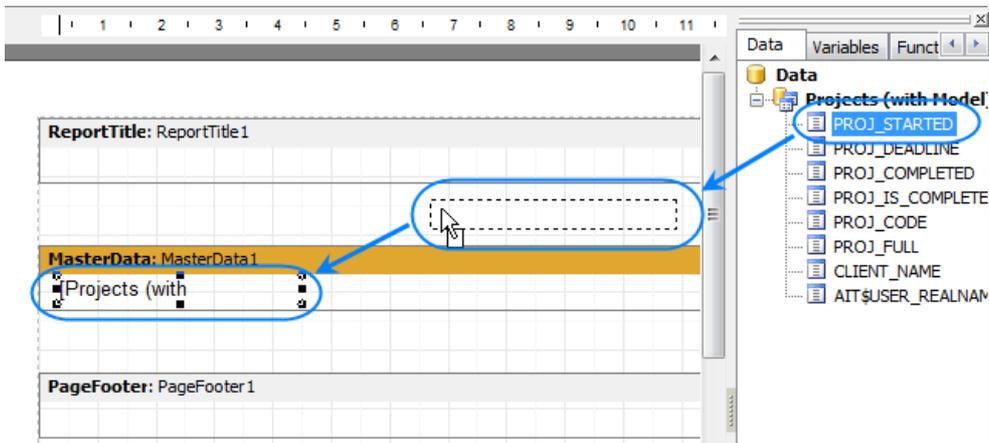
Your report page should look approximately like this:

**Example:**

<b>ReportTitle:</b> ReportTitle1	
<b>Header:</b> Header1	
<b>MasterData:</b> MasterData1	Projects (with Model)

**7. Adding data to the Master Data band.**

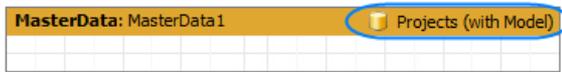
To add a variable to your report, you will need to drag-and-drop the required fields from your query to the **Master Data** band.



Any **Master Data** band can be linked to a specific dataset (or query in this case) only, so in case you have more than one query, be sure to drag and drop fields only to the **Master Data** band, which has been linked to this query.

**Example:**

For example, the **Master Data** band below can contain fields from *Projects (with Model)* query.



Drag sequentially the following fields from the **Data** area and place them inside the **Master Data** band in a row:

**Example:**

PROJ\_FULL, CLIENT\_NAME, PROJ\_DEADLINE

When placed into your report, the fields take the form of text objects, like the example below:

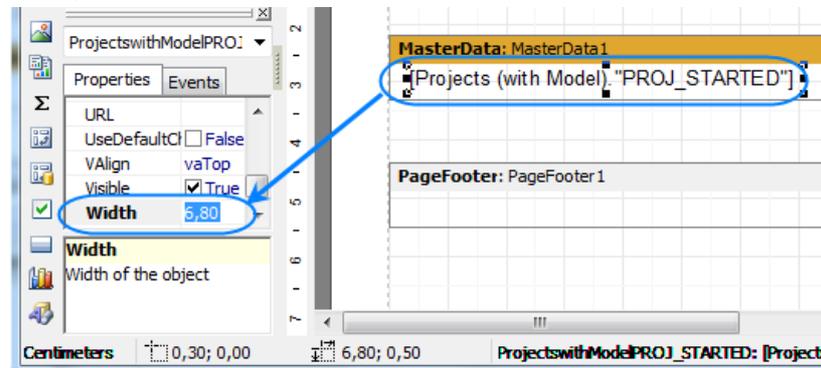
**Example:**

[Projects (with Model)."PROJ\_FULL"]

These text objects act very much like the text variables in Projex RTF templates.

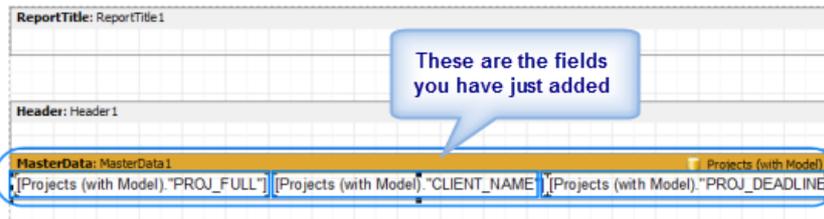
**Note:** Some of these objects may be very wide. You can adjust their width by dragging the borders of these objects. Alternatively, you can enter the exact object length by selecting it and typing their width in the **Properties** area:

**Example:**



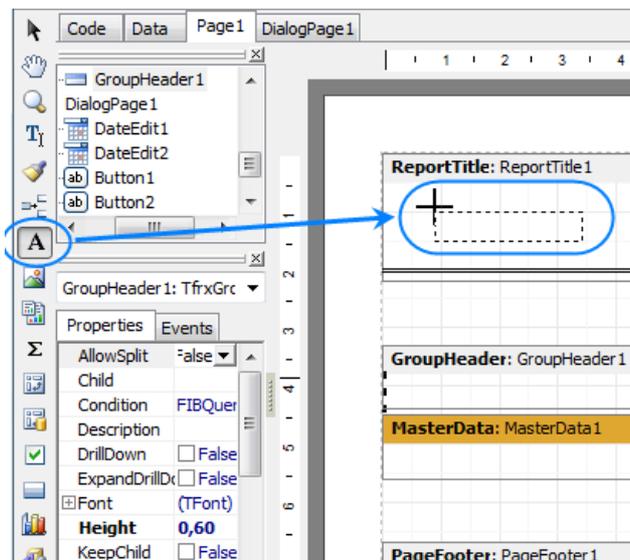
Once all the data has been added, your report should look like this:

**Example:**

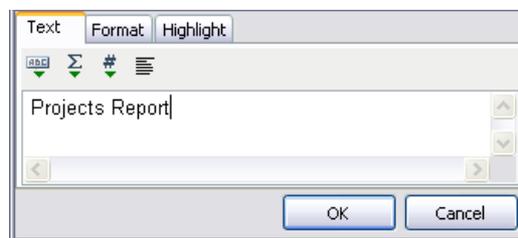


8. Adding stationary data to other bands.

8.1. Add a header for your report by clicking the **Text object** button and placing the object on your report, within the **Report Title** band.



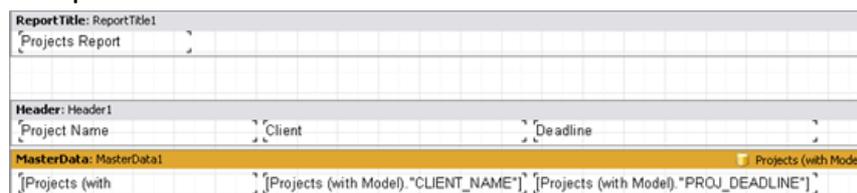
8.2. Type the header for your report in the memo window which appears.



8.3. Data will be displayed in your **Master Data** band in columns (each indicated by a field from the query). Add the names of these columns right above the query field objects in your **Header** band: Project name, Client, and Deadline the same way you added the header text object.

After this your report should look as follows:

**Example:**



9. Preview your report by clicking the **Preview** button.

**Note:** You can further configure the style of your report by configuring the style of text objects. Select the required text object and adjust its format in the **Properties** area to the left.

10. Save your newly created report by clicking the **Save** button and close the report designer.

Your new report is now ready to be used.

If you want to save this report in a separate file in the **Reports** folder of Projetex (so that you can send it to other Projetex users), select the report in the list and click the **Save** button.

---

See also:

[Managing custom reports](#)

# Creating a Master-Detail Report

It is often needed to gather information from different database tables. For example, to obtain a list of quotes and a list of marketing records for each client. In this case, the list of clients represents the "master" data, and the lists of quotes and events are called "detail" data (they show details for each client).

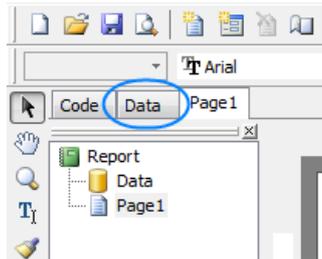
Objective: Create a report showing lists of quotes and marketing events for each of client.

1. Run the Projetex Server Administrator, turn the database offline by clicking the **Go Offline** button and switch to the **Corporate Settings > Reports** tab.

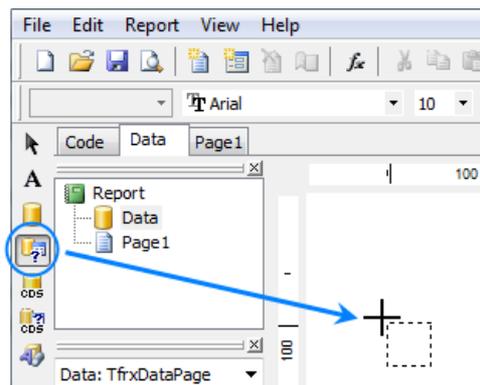
2. Click the **New** button; enter the report's name and description into **New Custom Report** window and click **OK**.

In this case none of the pre-designed queries suits this report, thus new queries must be created.

3. Click the **Data** tab to begin adding data to your query,



4. Click the **FIB Query** button and place a **FIB Query** object anywhere on the white field.



5. Double-click the new object, and enter the code text of the first query:

## Example:

```
SELECT
CQUO_NAME,
CQUO_SENT,
CQUO_TOTAL_B
FROM CMULTIQUOTES
WHERE CLIENT_ID = ?MAS_CLIENT_ID
```

This query will extract quote names (CQUO\_NAME), dates (CQUO\_SENT), and quote totals in the base currency (CQUO\_TOTAL\_B). The line WHERE CLIENT\_ID = ?MAS\_CLIENT\_ID arranges the data by master client reference.

6. Repeat step 5 (click the **FIB Query** button and place a **FIB Query** object anywhere on the white field) and add the following code to the second query:

## Example:

```
SELECT
CTRACK_DATE,
CTRACK_INFO
FROM CTRACK
WHERE CLIENT_ID = ?MAS_CLIENT_ID
```

This query will extract dates (CTRACK\_DATE) and notes (CTRACK\_INFO) of marketing events (shown on the **Marketing** tab of the **Client** window), and will also organize the data by the master client reference field.

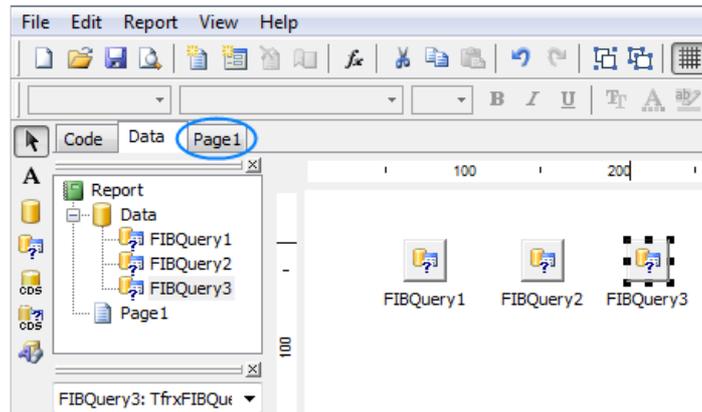
7. Repeat step 5 (click the **FIB Query** button and place a **FIB Query** object anywhere on the white field) and add the following code to the third query:

**Example:**

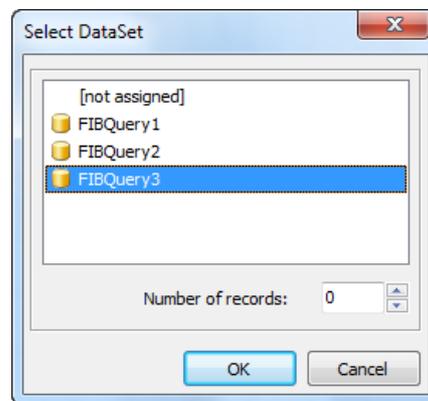
```
SELECT
CLIENT_NAME
FROM CLIENTS
```

This query will extract client names, which are also needed to build this report.

8. Click the **Page 1** tab to begin designing the report page.



9. Click the **Insert Band** button and add a **Master Data** band. Select **FIBQuery3** as the dataset for this band.



10. Click the **Insert Band** button and add a **Detail Data** band. Select **FIBQuery2** as the dataset for this band.

11. Click the **Insert Band** button and add a **Detail Data** band. Select **FIBQuery1** as the dataset for this band.

12. Drag the necessary fields to the appropriate data bands.

**Example:**

Dragged the following fields: **CLIENT\_NAME** - to the **MasterData1** band, **CTRACK\_DATE,CTRACK\_INFO** - to **DetailData1**, **CQUO\_SENT,CQUO\_NAME** - to **DetailData2**.

<b>MasterData:</b> MasterData1	FIBQuery3
[FIBQuery3."CLIENT_NAME"]	
<b>DetailData:</b> DetailData1	FIBQuery2
[FIBQuery2."FIBQuery2."CTRACK_INFO"]	
<b>DetailData:</b> DetailData2	FIBQuery1
[FIBQuery1."FIBQuery1."CQUO_NAME"]	

13. Add **Header** and **Footer** bands to separate various fields visually.

**Example:**

The following bands were placed in this example: **ReportTitle**, 2 **Header**-type bands (**Header1** and **Header2**), **Footer** band and **PageFooter** band. Also labels for header bands have been added.

<b>ReportTitle:</b> ReportTitle1
<b>MasterData:</b> MasterData1 <span style="float: right;">FIBQuery3</span> [FIBQuery3."CLIENT_NAME"]
<b>Header:</b> Header1 Marketing History
<b>DetailData:</b> DetailData1 <span style="float: right;">FIBQuery2</span> [FIBQuery2."][FIBQuery2."CTRACK_INFO"]
<b>Header:</b> Header2 Quotes
<b>DetailData:</b> DetailData2 <span style="float: right;">FIBQuery1</span> [FIBQuery1."][FIBQuery1."CQUO_NAME"]
<b>Footer:</b> Footer1
<b>PageFooter:</b> PageFooter1 Report collected: [Date] [Time]      Page [Page#] of [TotalPages#]

14. Now the report can be obtained:

**Example:**

A fragment of the resulting report, showing clients (master data) and the lists of quotes and marketing records for each (detail data).

<b>Alter Ego Solutions</b> Quotes 20.01.2006 Nulla quam.
<b>Electric Dream Design</b> Marketing History 25.05.2009 56n57n 25.05.2009 56n6n56n Quotes 21.01.2006 Field mis-match (Description) 16.03.2008 AeroLexic Dictionary
<b>Mythology Development Company</b> Marketing History 25.05.2009 56n65n 05.05.2009 56n56n 26.04.2009 56n56n56n Quotes 10.04.2008 Economic History Manual
Report collected: 6/10/2009 10:26:13 AM <span style="float: right;">Page 1 of 3</span>

---

See also:

Managing custom reports

# General troubleshooter

Problem	Probable cause	Solution
License key does not work.	You may be trying to use the Projetex Workstation key to register the Projetex Server.	The license contains two separate key sequences. Ensure that you use the Projetex Workstation key to register the Projetex Workstation.
Connection to Projetex Server cannot be established.	The Projetex Server host computer's name was specified incorrectly.	In the Projetex Workstation login window, click the <b>Server</b> button. Enter the correct network name or address of the Projetex Server host computer. Click the <b>Test Connection</b> button. If the connection test fails, click the <b>Browse</b> button to see the entire network tree, or try pinging the Projetex Server host computer through the Windows command prompt.
	Firewall or anti-virus software may be interfering with Projetex Server operation.	Try adding projetex.exe to the exceptions list on the Projetex Server host computer.
	TCP port 211 may be closed on the Projetex Server or Projetex Workstation host computer.	Ensure that TCP port 211 is open on the Projetex Server or Projetex Workstation host computer
Error when trying to save a document for printing.	Smart tags of MS Word may be interfering with template variables.	Try to disable all smart tags in MS Word. On the <b>Tools</b> menu, click <b>AutoCorrect Options</b> , and then click the <b>Smart Tags</b> tab. Click <b>Remove Smart Tags</b> , and then click <b>Yes</b> to confirm the deletion.
Database version error.	The database may not have been updated during the Projetex Server and Projetex Workstation update.	Run the Projetex Server Administrator, go to the <b>Database</b> tab. The current database version is displayed on the <b>Database Version</b> field. Click <b>Run Update Script</b> and select the update file which updates the current version to the next one. Repeat this for each update script until your database is updated to the latest version. For example, if your current version is 34 you need to select dbx33to34.ptu, if your current version is 32 you need to select dbx32to33.ptu and then dbx33to34.ptu.
The Projetex Workstation fails to connect to the Projetex Server with the following error message: Gateway not found. Be sure that Projetex Server is installed on 192.168.1.103. (Error Code: 10061).	You have selected a computer without an installed Projetex Server, as a server.	After the Projetex Workstation is launched, click the <b>Server</b> button and check whether the correct IP-address is entered. If the Projetex Workstation and Projetex Server are installed on the same computer, choose <b>This PC</b> . Then try to connect to the Projetex Server.
	Projetex has not been installed properly or has been updated partially (i.e. only the Projetex Workstation has been updated).	Re-install your copy of Projetex Workstation. For this, download the latest build of the program and install both the Projetex Server and the Projetex Workstation over the current copy of the program without uninstalling of it.

# FAQ

**Q: Is there any chance we can try it before we purchase the full software pack?**

A: Download free trial 30-day version of Projetex at: <http://projetex.com/translation-project-management-software-free-download>

**Q: I downloaded the Projetex Server Administrator as a 30-day trial, and it is requesting a password. Could you please help?**

A: There are default login and password, which you can change in future:

Default Login: Admin

Password: admin

**Q: What happens to the license if we change (buy new) computers; will it be possible to transfer the license from one computer to another?**

A: After purchase we will send you license code and you will be able to transfer / reinstall Projetex to new computer as many times as you need. If you lose your license key — we will send it to you again.

**Q: I have lost my license key; can you please send me my license key once again?**

A: There are two ways how to restore lost License Key for Projetex:

1. Visit <http://clients.translation3000.com/> and log in using e-mail, which you have indicated during the purchase, when ordering Projetex. On this web site you can always find all your licenses and restore any lost license key.

2. Send us your Purchase ID or your registration name and e-mail, which you have indicated for sending the license key, when ordering Projetex at Projetex Help Center and we will send you your license key.

**Q: What is the difference between Projetex and the Translation Office 3000? I'm confused. Why two programs?**

A: Translation Office 3000 was developed for freelance translators; it simplifies accounting, marketing and invoicing tasks. Projetex is project management software developed especially for translation agencies it is much more powerful and has a lot of additional features. Also it supports multi-user work. We have a lot of users that started with TO3000 and later switched to Projetex.

**Q: Does Projetex have all the same accounting functions as TO3000? (For example for tracking freelance invoices and payments)**

A: Projetex has much more accounting functions and a lot of additional features for tracking of jobs, invoices, payments, quotes, etc. Projetex was designed especially for translation agencies and it has a lot of new features. The two main differences are:

1. Projetex is a client-server application.
2. In addition to Clients and Projects modules seen in TO3000, Projetex has Freelancers and Corporate Team modules.

**Q: How can I upgrade from older Projetex Workstation build to newer Projetex Workstation build?**

A: Just install new workstation in the same folder as before, no special steps are necessary. Note that upgrade of workstation may require upgrade of server as well, in this case workstation will pop up message prompting you to upgrade server software.

**Q: How much do we have to pay for new build of Projetex?**

A: As long as new build is within the same version, you do not have to pay anything. If new build has different version number than the one you possess (e.g. if you own license for Projetex 10.0 or older and wish to update to 3D), look for special upgrade pricing, as we always give preferential upgrade prices to users of previous versions. "Preferential upgrade" means that for users of earlier versions the price they have paid for Projetex 10.0 plus the price of upgrade to Projetex 3D would be less than price of new Projetex 3D license.

**Q: Where can I find new update scripts?**

A: All the update scripts for Projetex database are installed along with the new build. By default these scripts are located in the following folder:

`\Program Files\AIT\Projetex 3D\Projetex Server\DBUpdates`

After installation of new Projetex Server build you will find new update scripts there.

**Q: I would like to start from scratch. How do I empty the database in order to have a clean start?**

**A:** First, delete or move to other location your current database file Projetex3D.mdf located in C:\Program Files (x86)\Microsoft SQL Server\MSSQL12.P3D\MSSQL\DATA (this folder is set by default, your location may differ). Then, run Projetex 3D Server Administrator Setup again and select the Empty Database option.

**Q: Will I lose my database after update of Projetex Server?**

**A:** No, you will not lose your database. Simply reinstall Projetex Server with Do not install database option selected.

**Q: Can I install both server and workstation on the same PC?**

**A:** Yes. This is default setting in evaluation version. When you install both Projetex Server and Projetex Workstation on the same PC, Workstation connects to 'localhost', i.e. the same (local) computer.

After you move server to some another PC on your network, change server name to name of that PC by clicking Server button on Workstation login window.

**Q: How can I move Projetex with my database to another PC?**

**A:** To move Projetex from PC1 to PC2, install Projetex on PC 2 without demo database (clean start) and restore the database created on PC 1 on PC 2 using Restore option in Projetex Server Administrator.

# AnyCount

## Word Count, Character Count, and Line Count Software

AnyCount is an essential time-saving product for any translation business. It produces quick and exact automatic counts both in words and in other volume units (characters with spaces, characters without spaces, lines, pages, custom units) for all common file formats. AnyCount counts words — you count money!

AnyCount 3D - Enterprise Edition

Files Settings All Formats **Count!** Export Print Invoice Language

Count! Results

.PDF Details

Count Units: words

File	File Total
D:\trados\Manuals\SDL MultiTerm 2011 Extract User Guide.pdf	16725
D:\trados\Manuals\SDL MultiTerm 2011 SP2 Installation Guide.pdf	5683
D:\trados\Manuals\SDL Trados Studio 2011 SP2 Installation Guide.pdf	11525

33933

Files: 3 .PDF Subtotal: 33933 Total: 33933

Files Settings Count! Export Print Invoice

Web-site:

<http://www.anycount.com>

# Translation Office 3000

## Portable Headquarters of the Freelance Translator

Translation Office 3000 transforms the complex and diverse world of your translation business into an easily-manageable one. It is widely used by small translation agencies. It is a unique combination of many benefits for your translation business in a single software package. With Translation Office 3000 you can communicate more consistently keeping track of all the important things, which happen in your freelance translation business. This software will be your personal accountant, adviser, assistant, and project manager. Simplify your task of administration workflow with Translation Office 3000!

The screenshot displays the Translation Office 3000 software interface. At the top, the title bar reads "TO3000, Version 3D - Advanced Edition". Below the title bar is a navigation menu with tabs for "Prospects", "Clients", and "Projects". A search bar is located to the right of the navigation menu. Below the navigation menu is a toolbar with icons for various functions: Client, Prices, Quotes, Client Jobs, Invoices, Credit Notes, Payments, Refunds, Client Accounts, and Business Expenses. Below the toolbar is a breadcrumb trail: "Key Outsourcing Studios: Client Jobs | 0058, Translation software market review | Clients: Invoices | Projects: Client Jobs | Clients: Quotes". The main workspace is divided into several panes. The left pane shows a tree view of the project structure. The central pane displays a table of data with columns: Code, Name, Client, and Assigned. The right pane shows a "Draft Client Jobs for Q-NETCOM001" section with buttons for "New", "Edit", and "Delete", and a table with columns: Name, Group of Service, Service, and U. At the bottom of the interface, there are navigation controls and a status bar.

Code	Name	Client	Assigned	
Q-NETCOM0	Speech script translation	Network Community Technolo	08.05.2017 00:00	1
Q-DEFDES00	Pellentesque at ante	Definition Designs	15.06.2016 00:00	26
Q-INTSEC00C	Nulla quam.	Internet Security Technologies	13.11.2016 00:00	05
Q-INTSEC00C	Suspendisse posuere	Internet Security Technologies	20.03.2017 00:00	30
Q-LIGRA0001	Cras eget mi.	The Lightning Graphics	09.05.2016 00:00	30
Q-DEFDES00	www.translation3000.com	Definition Designs	24.07.2015 00:00	08

Name	Group of Service	Service	U
Speech script translation	Editing	Proofreading	hour

Web-site:  
<http://www.to3000.com>

# Client Jobs Window

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

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

Client Jobs							
Edit							
Status: *All*							
Invoiced: *All*							
Project Manager: *All*							
* Code	Job Name	Project	Assigned	Deadline	Completed	Group of Services	
J-DNE000:	DNE web-site check	General consistency check of Digil	10.12.2016 09:00	10.12.2016 18:00	- No -	DTP Tasks	
J-DNE000:	General consistency check	General consistency check of Digil	10.12.2016 09:00	14.12.2016 18:00	- No -	Other	

## Filters

Use the **Status** filter drop-down list to display only *completed*, *not completed*, or *overdue* client jobs.

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

The **Project Manager** filter drop-down list allows you to select to view only jobs managed by a particular *Project Manager*.

## Client Job Statuses

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

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

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

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

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

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