



# **Projetex 3D Quick Start Guide**

## Table of Contents

Projetex 3D Quick Start Guide .....	1
Setting currencies and services.....	3
Setting base currency .....	3
Adding new currencies .....	4
Setting exchange rates .....	4
Managing services .....	5
Creating a database of clients and prospects.....	6
Creating quotes and projects.....	8
Creating jobs .....	10
Assigning experts .....	11
Invoices and purchase orders .....	12

# Setting currencies and services

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

## Setting base currency

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

Base currency can be changed in **Administrator** section of **Projetex Workstation Settings** menu ( — **Backstage view**).

To do so:

- Run **Projetex Workstation** and login with account possessing administrator privileges ('admin' by default).
- Choose **General** section.
- Press **Base Currency** button and confirm the operation.

 **Note:** all your existing exchange rates, if any, will be reset.

- Choose new *base currency*.
- Set new exchange rates for currencies available in your database.

 **Note:** you can enable automatic online exchange rates update later in settings.

## Adding new currencies

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

### To define currency settings:

1. Open **Projetex Workstation** and select **Corporate Settings** section of **Settings** menu  
( — **Backstage view**).
2. Click **Currencies**.
3. If some of the currencies that you need are not included into the list, you may add them by clicking **New** button. You can also edit or delete an existing currencies.

## Setting exchange rates

You can *enter exchange rates* between your base currency and any of the other currencies.

Exchange rates of currencies are used for keeping parallel records in both base currency and client/freelancer currencies relating to your base currency.

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

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

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

Set the **Automatically download exchange rates** checkbox at the bottom of the window to enable automatic rates updates. Exchange rates will be downloaded from Internet automatically. You can choose how often do you want exchange rates to be updated.

## Managing services

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

### To add or edit a group of services:

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

### To add or edit a service:

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

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

# Creating a database of clients and prospects

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

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

## A Using New Client Wizard.

To create a client record, on  [Wizards](#) menu at the top of the window click [Client](#) command and follow the steps of [New Client Wizard](#). This option may not be available for some of the users due to access rights limitations.

## B Creating a new client on the Main tab of Client window.

To create a client record, follow the steps below:

1. Click [New Client](#) button above the [Client list](#) on the [Main](#) tab of [Client](#) window.
2. Enter a name of the client in [Name](#) text field.

The [Code](#) will be generated automatically (it will usually contain the first letters of Name in this case), but you can enter it manually as well.

Select [Client Currency](#) using the corresponding drop-down list.

Click [OK](#) to confirm or [Cancel](#) to discard the entered information.

 **Note:** *If you do not use [Wizard](#), you will need to fill in the necessary fields later to provide full client information.*

In [Projetex 3D](#) you can also create the database of Prospects, your prospective clients, which are put into separate section.

To create a prospect record, follow the steps below:

1. Click [New Prospect](#) button above the [Prospect list](#) on the [Main](#) tab of [Prospect](#) window.
2. Enter a name of the prospect in [Name](#) text field.

The [Code](#) will be generated automatically (it will usually contain the first letters of Name in this case), but you can enter it manually as well.

Select [Currency](#) using the corresponding drop-down list.

Click [OK](#) to confirm or [Cancel](#) to discard the entered information.

 **Note:** *You will need to fill in the necessary fields later to provide full prospect information.*

**To import Client database from a file:**

Run [Projetex3DSetup.exe](#) to install [Projetex 3D Import Utility](#).

Run [Projetex 3D Import Utility](#) and proceed with import process.

For more details on [Projetex 3D Import Utility](#), please refer to the corresponding guide.

**To import Client database from your Translation Office 3000:**

Run [Projetex Database Converter](#).

Convert your [Translation Office 3000](#) database.

For more details on [Projetex Database Converter](#), please refer to the corresponding guide.

# Creating quotes and projects

*Quotes to clients* can be created using **Quotes** tab of **Client window**.

*Quotes to prospects* can be created using **Quotes** tab of **Prospect window**.

*Projects* can be created using **Main** tab of **Projects window**. A project can also be created based on a certain quote.

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

## A Using New Quote Wizard.

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

## B Creating a new quote to client on the Quotes tab of Client window.

To create a quote to a client, follow the steps below:

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

*Quotes to Prospects* can be created on the **Quotes** tab of **Prospect** window.

To create a **quote to a prospect**, follow the steps below:

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

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

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

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

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

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

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

**Product Line** this button can be used to assign a project to a different product line. Current product line is displayed next to **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 default client's PM for all new client jobs of this project. See **Contacts List** topic of the help file for details on adding and editing contacts.

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

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

To mark project as completed, set **Completed** check box.

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

# Creating jobs

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

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

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

## A: Tree tab of Project window.

1. Open **Projects** section of the ribbon and click **Project** icon.
2. Click **Main** tab and select a project.
3. Go to **Tree** tab.
4. Right-click the project icon at the top of the tree view and select **New Client Job** in the context drop-down menu OR press **New** button.

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

## C: Using the Wizard.

1. Click the  **Wizards** menu and choose **Job**
2. Follow the instructions to create new **client job**

 **Note:** *New client jobs will be created from draft jobs when you convert a quote to a project.*

For more information regarding client jobs please refer to the corresponding help file section.

# Assigning experts

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

## To assign corporate expert or freelancer:

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

## To remove corporate expert or freelancer from a job:

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

# Invoices and purchase orders

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

**To create an invoice to client,**

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

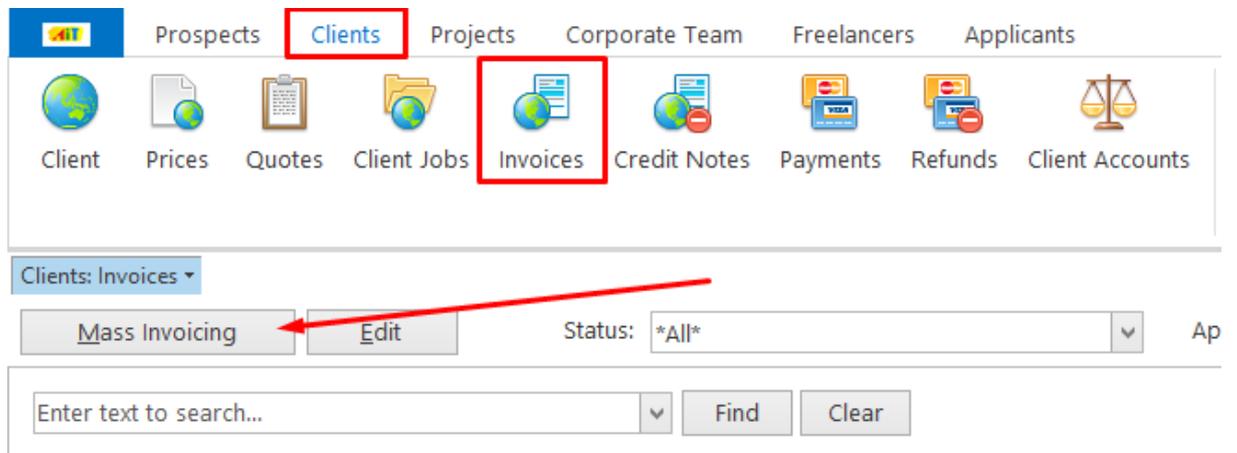
The screenshot shows the Projex 3D software interface. At the top, there is a navigation bar with icons for Client, Prices, Quotes, Client Jobs, Invoices, Credit Notes, Payments, Refunds, and Client Accounts. The 'Client' icon is highlighted with a red box. Below this is a breadcrumb trail: '0033, ADS - User Guide: Tree | 0020, "New challenges in virtual world" article: C | Cyber Computation Technologies, Inc: Invoi'. The main window has several tabs: 'Main', 'Contacts', 'Marketing', 'Prices', 'Quotes', 'Projects', 'Client Jobs', 'Invoices', 'Credit Notes', and 'Payment'. The 'Invoices' tab is highlighted with a red box. Below the tabs are buttons for 'New', 'Edit', 'Delete', and 'Void'. The 'New' button is highlighted with a red box. To the right of these buttons is a 'Status:' dropdown menu set to '\*All\*'. Below the buttons is a search bar with the text 'Enter text to search...' and 'Find' and 'Clear' buttons. At the bottom, there is a table with the following data:

* Client	Code	Global Code	Sent	Currency	Exchange Ra	Volur
▶ Cyber Computation Techno	I-CCT0001	ACME-I0054/201	02.02.2019	EUR	1,00	
Cyber Computation Techno	I-CCT0002	ACME-I0055/201	14.11.2018	EUR	1,00	
Cyber Computation Techno	I-CCT0003	ACME-I0056/201	19.12.2018	EUR	1,00	

Alternatively, in the  **Wizards** menu click **Invoice** command. This will start New Invoice Wizard.

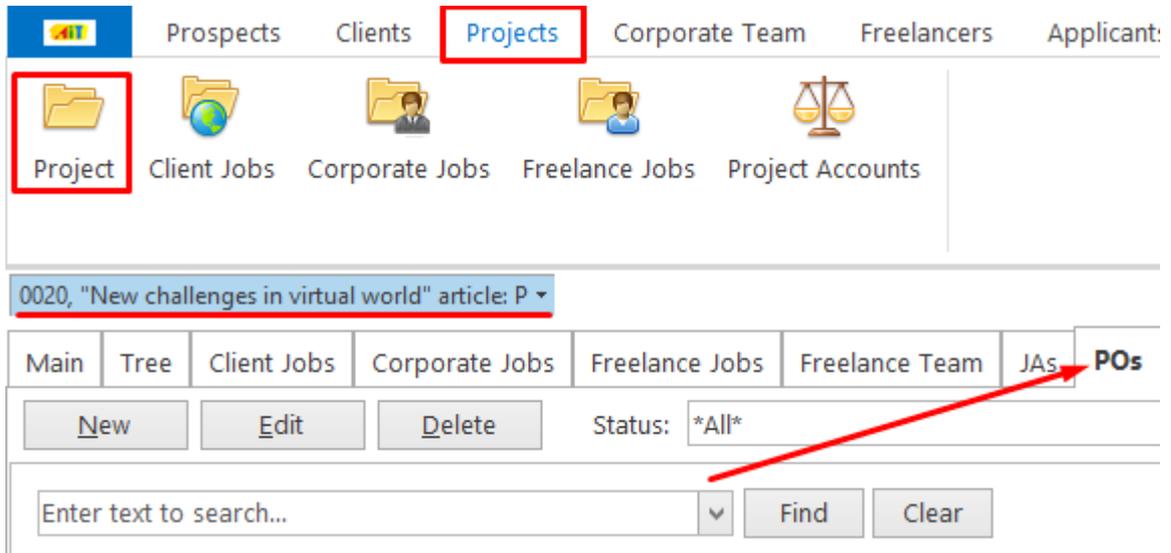
The screenshot shows the Projex 3D software interface with the 'Wizards' menu open. The menu items are: Client, Product Line, Contact, Service, Quote, Job, Invoice, and PO. The 'Invoice' item is highlighted with a blue background and a red arrow points to it from the left. The background shows the same interface as the previous screenshot, with the 'Client' icon highlighted in the navigation bar.

Invoices can also be created by clicking the **Mass Invoicing** button on the **Invoices** pane of the **Clients** tab.

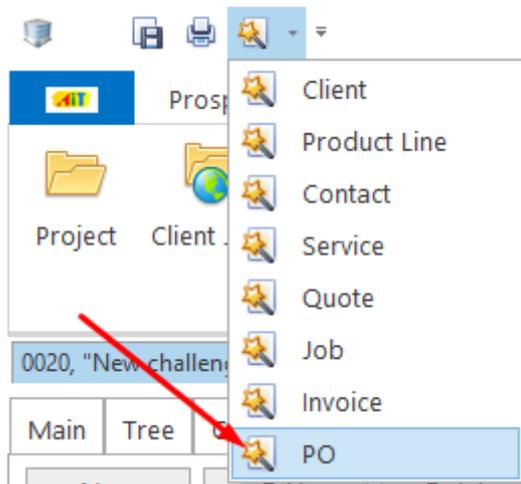


### To create a purchase order:

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



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



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

**To create purchase order this way:**

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

