



## **Projetex 3D Accountant — Reference Guide**

© 2020 Advanced International Translations

## Table of Contents

1	Introduction.....	4
2	Interface Overview.....	5
2.1	Navigation.....	5
2.2	Multi-window Interface.....	8
3	Setting currencies and services .....	13
4	Clients.....	14
4.1	Client Window .....	14
4.1.1	Main Tab of Client Window .....	14
4.1.2	Contacts Tab of Client Window.....	20
4.1.3	Marketing Tab of Client Window .....	20
4.1.4	Prices Tab of Client Window.....	20
4.1.5	Quotes Tab of Client Window .....	21
4.1.6	Projects Tab of Client Window .....	22
4.1.7	Client Jobs Tab of Client Window .....	22
4.1.8	Invoices Tab of Client Window.....	23
4.1.9	Credit Notes Tab of Client Window .....	24
4.1.10	Payments Tab of Client Window .....	24
4.1.11	Refunds Tab of Client Window.....	25
4.1.12	Account Tab of Client Window .....	25
4.1.13	Files Tab of Client Window .....	25
4.1.14	Info Tab of Client Window.....	27
4.1.15	Calendar Tab of Client Window .....	27
4.2	Client Prices window .....	28
4.3	Quotes to Clients .....	29
4.4	Client Jobs .....	29
4.5	Invoices to Clients .....	30
4.6	Credit Notes to Clients .....	31
4.7	Payments from Clients .....	31
4.8	Refunds to Clients.....	32
4.9	Accounts of Clients .....	32

5	Prospects .....	33
6	Corporate Expenses .....	33
7	General Freelancers Windows .....	34
7.1	Freelancer Window .....	34
7.1.1	Main Tab of Freelancer Window .....	34
7.1.2	Application Tab of Freelancer Window .....	39
7.1.3	Prices Tab of Freelancer Window .....	39
7.1.4	Quotes Tab of Freelancer Window .....	39
7.1.5	Freelance Jobs Tab of Freelancer Window .....	40
7.1.6	POs Tab of Freelancer Window .....	41
7.1.7	Payments Tab of Freelancer Window .....	41
7.1.8	Account Tab of Freelancer Window .....	41
7.1.9	Files Tab of Freelancer Window .....	42
7.1.10	Info Tab of Freelancer Window .....	43
7.1.11	Calendar Tab of Freelancer Window .....	43
7.2	Freelance Prices .....	44
7.3	Quotes from Freelancers Window .....	44
7.4	Freelance Jobs Window .....	45
7.5	POs to Freelancers Window .....	46
7.6	Payments to Freelancers Window .....	46
7.7	Accounts of Freelancers Window .....	47
8	Applicants .....	47
9	The Calendar .....	48
9.1	Settings for the Calendar view .....	48
9.2	Job/Project block colors .....	48
9.3	Filtering Calendars .....	49

# 1 Introduction

This guide covers some of the [Projetex](#) features most often used by accounting staff. These are:

- Viewing accounts payable and accounts receivable of clients and freelance translators.
- Monitoring and updating currency exchange rates between base currency and client/freelancer currencies.
- Issuing invoices to clients.
- Managing payments from clients and settling invoices.
- Monitoring purchase orders to freelance translators.
- Registering invoices from freelance translators.
- Managing payments to freelance translators.

For more information on other topics, like filtering data, reporting and exporting, please refer to other [Projetex](#) guides, which can be downloaded from the following web page:

<http://www.projetex.com/documentation>

## 2 Interface Overview

### 2.1 Navigation

The Ribbon is a part of Projetex user interface simplifying and quickening navigation in the program.

You can hide the Ribbon to free display space by clicking the arrow symbol in the lower-right corner of the ribbon.

#### Client group of icons



**Client** window displays all information about the taken client. Client data is broken down by the following tabs: **Main**, **Contacts**, **Marketing**, **Prices**, **Quotes**, **Projects**, **Client Jobs**, **Invoices**, **Credit Notes**, **Payments**, **Refunds**, **Account**, **Files**, **Info**, **Calendar**.



**Clients: Prices** window provides access to general price list: each price representing a rate in chosen currency for certain service (language pairs, translation, proofreading, etc.). This list also appears in the Prospects: Prices window.



**Clients: Quotes** window provides access to all currently created client quotes. This window can be used to create a new project based on a quote, add/edit/delete draft jobs for existing quotes.



**Client Jobs** 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, edit and delete client jobs.



**Clients: Invoices** window provides access to all currently issued invoices. Use this window to calculate invoice totals, view and edit invoices, print any of these invoices, perform Mass Invoicing.



The **Clients: Credit Notes** 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.



**Clients: Payments** window lists all payments received from all Clients. Use this window to calculate payment totals, link payments with invoices, edit, delete payments and perform Mass Payments.



The **Clients: Refunds** 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** window displays a simplified Account sheet broken by clients based on payments from clients and invoices to clients. Accounting staff can use this window to identify which of clients' accounts require attention. Can be viewed in Base Currency or Client Currencies.

## Corporate Team group of icons



The **Corporate Expert** 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: **Main, Corporate Jobs, JAs, Payments, Prices, Account, Files, Info, Calendar**.



The **Corporate Experts: Prices** 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** window displays the 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, edit and delete corporate jobs.



**Corporate Experts: Job Assignments** window displays the list of all currently issued job assignments to all corporate experts. Here you can edit existing JAs.



The **Corporate Experts: Payments** 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.



The **Corporate Accounts** 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** window can be used to make and view entries about any expenses that are not concerned with paying in-house and freelance experts.

## Freelancers group of icons



The **Freelancer** window displays a list of freelance experts and consolidated information about the selected freelancer. Freelance expert data is broken into the following tabs: **Main, Application, Prices, Quotes, Freelance Jobs, POs, Payments, Account, Files, Info, Calendar.**



The **Freelancers: Prices** 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 **Applicants: Prices** window.



The **Freelancers: Quotes** window displays a list of all quotes from freelance experts stored in the database.



**Freelance Jobs** window displays the 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.



**Freelancers: POs** window displays all currently issued purchase orders for freelance jobs. Here you can edit existing POs and use the Mass PO function.



**Freelancers: Payments** window lists all payments sent to all freelancers. Use this window to calculate payment totals, link payments with purchase orders, edit and delete payments.



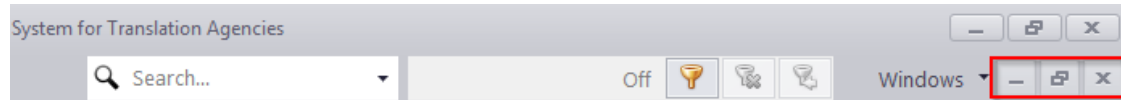
The **Freelancer Accounts** window displays a simplified balance sheet broken into entries for each freelancer and based on purchase orders and payments to freelancers. Accounting staff can use this window to identify which accounts require attention. Can be viewed in Base Currency or Expert Currencies.

## 2.2 Multi-window Interface

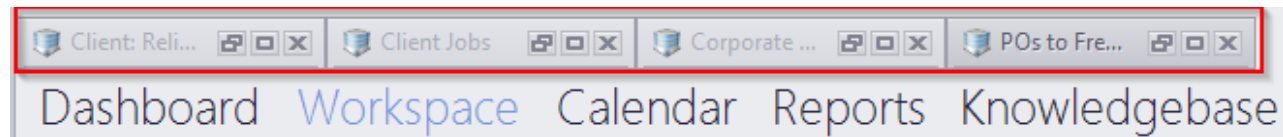
Every time you click an icon on the Ribbon to open a table, report, calendar, dashboard, or knowledgebase, it opens in a new window inside the program.

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.

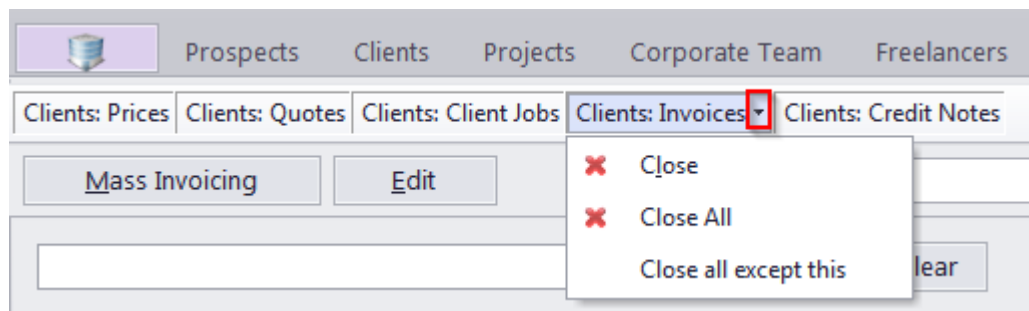


Minimized windows are lined up right above the Navigation Bar and can be moved around as well.



### 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.

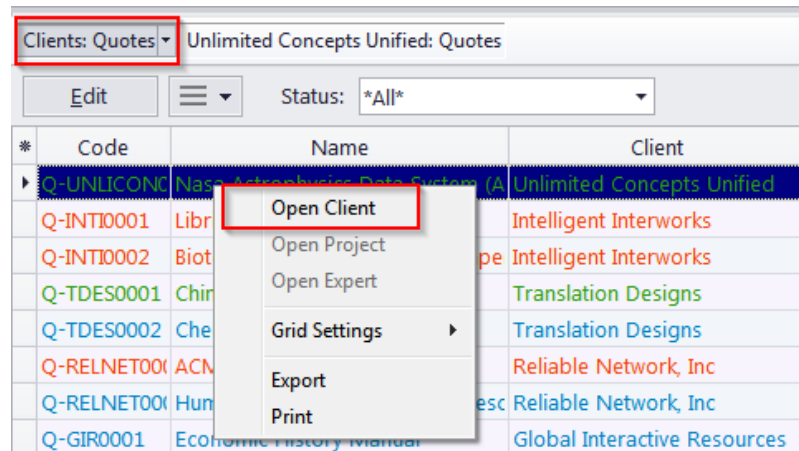


## Context jumps

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.

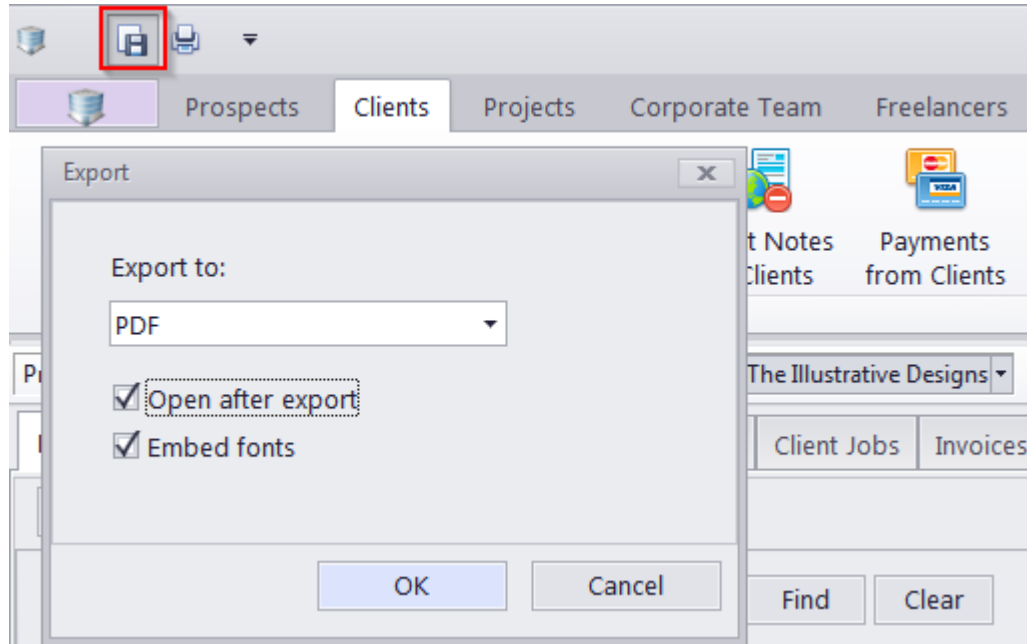
The **Open Project** and **Open Expert** options work similarly.

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.

## 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.

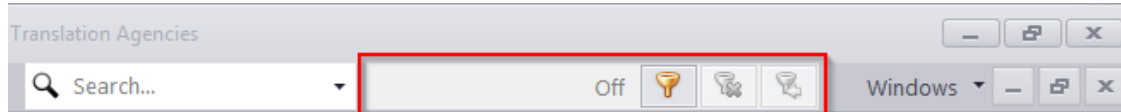
The **Embed fonts** check-box, only visible when exporting to PDF, creates a .pdf file with all used fonts embedded (using this option you can be sure that your text will look the same on any computer, even if the fonts used are not installed there).

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.

## 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.

## Local Custom Filter

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

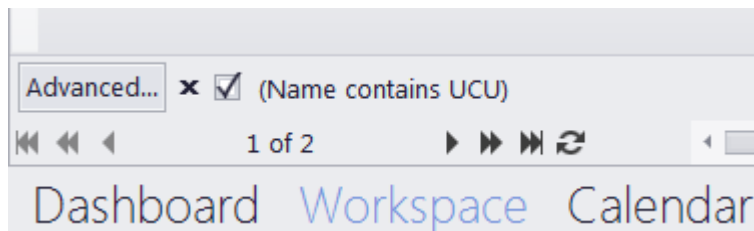
In Projetex 3D, the Local Custom Filter consists of three main parts: the Filter Builder, the Filter Box and the Column filters.

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.



The **Open...** button of the Builder browses for previously saved FLT files.

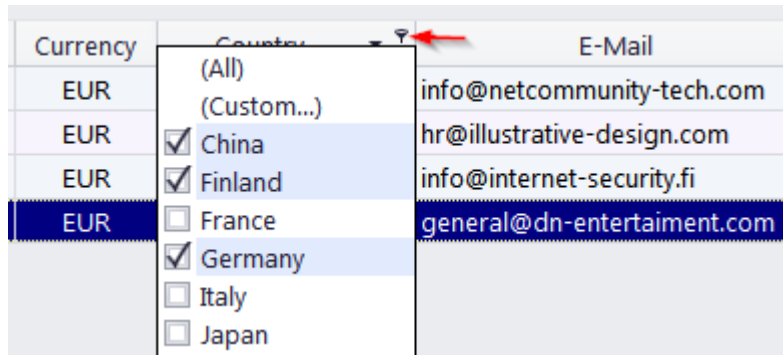
The **Save as...** button saves the current settings of the Local Custom Filter as an FLT file.

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.

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...).



The screenshot shows a table with three columns: 'Currency', 'Country', and 'E-Mail'. The 'Country' column has a dropdown menu open, showing options: '(All)', '(Custom...)', 'China' (checked), 'Finland' (checked), 'France' (unchecked), 'Germany' (checked), 'Italy' (unchecked), and 'Japan' (unchecked). The table data is as follows:

Currency	Country	E-Mail
EUR	(All)	info@netcommunity-tech.com
EUR	(Custom...)	hr@illustrative-design.com
EUR	<input checked="" type="checkbox"/> China	info@internet-security.fi
EUR	<input checked="" type="checkbox"/> Finland	general@dn-entertainment.com
EUR	<input type="checkbox"/> France	
	<input checked="" type="checkbox"/> Germany	
	<input type="checkbox"/> Italy	
	<input type="checkbox"/> Japan	

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

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

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

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

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

### 3 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.

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](#).

#### 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** in the **Backstage** view.
2. In **Corporate Settings** window, click **Currencies**.
3. If some of the currencies that you need are not included into the list, you may add them by clicking **New** button. You can also edit or delete existing currencies.

#### Setting exchange rates

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

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

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

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

## 4 Clients

### 4.1 Client Window

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

#### Client Window tabs

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

- **Main** tab — contains profiles of your clients. Client records can be created and marked as completed here. This tab also contains client profiles.
- **Contacts** tab — lists contacts of the selected client. New client contacts can be added here.
- **Marketing** tab — contains marketing information added by your sales representatives or marketing staff.
- **Prices** tab — holds individual price list of selected client. Here this client's prices can be created and edited.
- **Quotes** tab — is used for issuing and managing quotes offered to the selected client.
- **Projects** and **Client Jobs** tabs — these tabs contain projects and client jobs of the selected client.
- **Invoices** and **Payments** tabs — these tabs hold all invoices issued and payments made of 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.
- **Account** tab — provides the most basic overview of financial accounts of the selected client.
- **Files** tab — this tab is used for accessing selected client's files and folders.
- **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.

#### 4.1.1 Main Tab of Client Window

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

#### Clients 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 ("hamburger" icon), 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 **Delete** button.

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

Clients are listed in the form of 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 local custom filter and global date filter) or page settings, you may not be able to see all the clients in the database.

## Client profile

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

- **Client code** — click this button to enter or change the client's code (15 characters maximum). This is the same code, which had been assigned, manually or automatically, when creating the new client record. This code is also used for naming client folders as well as in codes for invoices, 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 a postal address of the client.
- **Contact Info** button — allows you to add or change contact information of the client.
- **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 client are outstanding, overdue or will be due soon.
- **VAT Number** — enter 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 client currency, converted according to exchange rates which you set.
- **Next Codes** — click this button to edit the automatic counters 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 cannot set the code value any lower than the highest value on existing documentation.
- **Locale Format** — different clients usually have different requirements to displaying dates, numbers and monetary values. Locale format settings are used to configure this format individually for each client. These formats will then be applied to any printable documentation.
- **Invoicing Policy** — by adjusting invoicing policy you determine conditions upon which Projetex will prompt you to invoice client jobs.
- **FTP connections** — you can set parameters for access to FTP folders of this client. Shortcuts to these folders will be automatically added to **Files** tab of this client's window.
- **General Information** — any additional information which did not fit into any of the other sections can be entered here.

### Custom data of client

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 **Custom** tab, next to the **Client Profile** tab.

 **Note:** Only users with access to **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.

### Postal address of client

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

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



## General contact information

Clients in [Projetex](#) have two types of contact information: general contact information (usually of a company rather than a person) and contact information of 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. **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.

General contact information of a client can also be added to templates with the help of Client Information Variables.

## Payment terms of client

According to the payment terms of a client, [Projetex](#) will keep track of unpaid invoices and update status of outstanding invoices: overdue, due today, due tomorrow, and so on.

With the help of [Edit Payment Terms](#) dialog you can configure payment conditions of a selected client, including:

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

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

Select [Unknown/Other](#) to disable automatic payment terms control.

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

## Next client codes

Codes of quotes, client jobs, payments and client-specific codes of invoices are generated automatically each time a new quote, client job, payment or invoice is entered into database. 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 [Next Codes for Client](#) window.

The maximum value of the next code which can be entered in [Next Codes for Client](#) window is 999999. There is no technical limit to the maximum value that the counter can reach.

To open [Next Codes for Client](#) window, click [Next Codes](#) button in this *client's profile*.

## 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 note with no maximum length.

## Locale format of client

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

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

The following locale settings can be configured:

**Negative Currency Format** — these settings determine how negative amounts of money are displayed. For example, in some countries negative amount is indicated with a "minus" put before number: -100.00. In other countries 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 the documents to a number of decimals specified here. Set this parameter to 0 if the currency of a client does not have decimal units. Most commonly number of digits after decimal is 2.


**Digit Grouping Symbol** — this is the symbol which will be inserted between each three digits in the number, for example in the following number *1 000 000* digit grouping symbol is space.

**Date Separator** — enter character to separate day, month and year in date when it is displayed in short format. For example, in the following date 3,31,2008 the date separator character is comma. Settings in **Date Separator** field will be automatically applied to **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 drop-down list. Use *d* to indicate day, *m* – for month, and *y* – for year. Date separator characters can be entered manually in this field as well. Otherwise settings from **Date Separator** field will be applied.

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

 **Note:** To map brief day or month ("*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 short date format by typing 3 or 4 characters in **Short Date Format** field.

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

## Invoicing policy of client

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**, following by comment, depending on the current *invoicing policy settings*, for example, "**Total reached**".

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

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

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

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

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



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

## Client FTP Connection

*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*.

#### 4.1.2 Contacts Tab of Client Window

*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 **Client PM** field).

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

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

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

**Delete** button deletes currently selected contact.

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

#### 4.1.3 Marketing Tab of Client Window

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

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

#### 4.1.4 Prices Tab of Client Window

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

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

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

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

**Delete** button deletes currently selected price.

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

You can print client's price list or save it in a text file by selecting the template and clicking **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.

#### 4.1.5 Quotes Tab of Client Window

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

##### Client Quote Buttons

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

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

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

**Delete** button deletes currently selected quote.

The **More...** (hamburger icon) 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** button will create a new project for the current client, based on data from currently selected quote. If a quote folder contains any files, **Projetex** will query whether these files must be copied to project folder of a new project.

##### Draft Client Job Buttons

Buttons for management of draft client jobs are located on the right side of **Quotes** tab of **Client** window.

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

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

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

##### Quote Filters

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

## Client Quote Status

A quote can have one of the following 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 status

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

### 4.1.6 Projects Tab of Client Window

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

#### Project Filters

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

**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 determine 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*.

### 4.1.7 Client Jobs Tab of Client Window

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

Use **Status** filter drop-down list to display only Completed, Not Completed, or Overdue client jobs.

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

If you have set invoicing policy for this client in this client's profile on the **Main** tab of **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 determine current status of each client job:

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

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

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

**Black** — client job is *completed*.


 **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 **Status** drop-down list in **Edit Job** window.

 **Note:** To configure status colors on the **Settings** menu click **Current user**, then click **Colors: Status**.

### 4.1.8 Invoices Tab of Client Window

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

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

**New** button opens **New Invoice** window, where a new invoice to client can be created.

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

**Delete** button deletes currently selected invoice.

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

## Invoice Filters

You can view only fully paid or only unpaid (outstanding) invoices. To display only invoices with a particular status click **Status** filter drop-down list.

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

## Invoice Statuses

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

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

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

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

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

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

### 4.1.9 Credit Notes Tab of Client Window

**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 cannot 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 its 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).

### 4.1.10 Payments Tab of Client Window

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

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.

#### 4.1.11 Refunds Tab of Client Window

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.

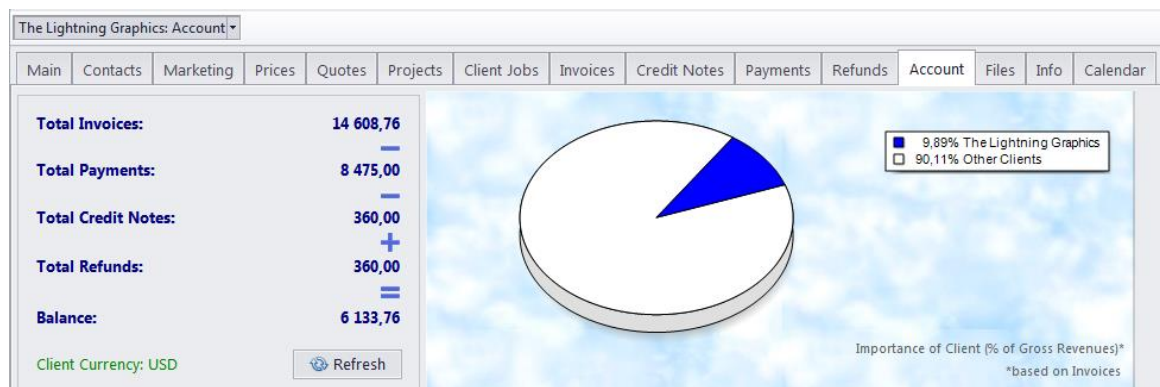
The **Delete** button deletes the currently selected refund.

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

Use 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.

#### 4.1.12 Account Tab of Client Window

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



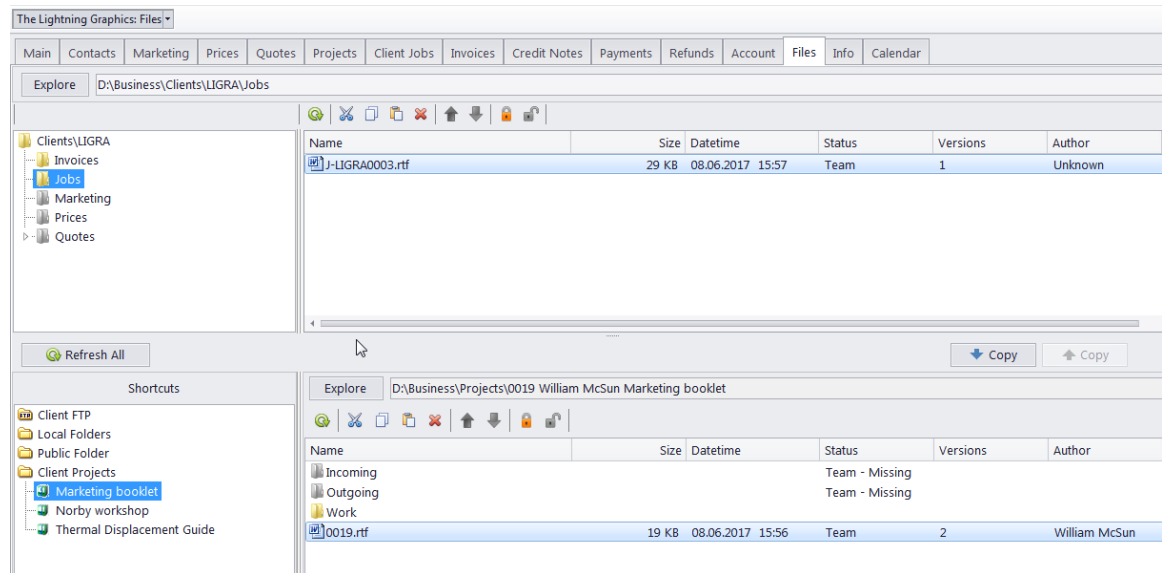
To open **Account** tab, open **Client** window and then click **Account** tab.

#### 4.1.13 Files Tab of Client Window

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 file from path currently opened in Shortcuts pane to client folder.



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

Context menu contains the following specific file operations:

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

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

**Download** can be used to download the file *BusinessServer* folder on Projetex Server Administrator PC to *Business* folder on Workstation PC.

**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 *BusinessServer* folder on server and in local storage are identical.

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

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

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

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

#### 4.1.14 Info Tab of Client Window

**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 for all project manager users.

Each note record consists of the following elements:

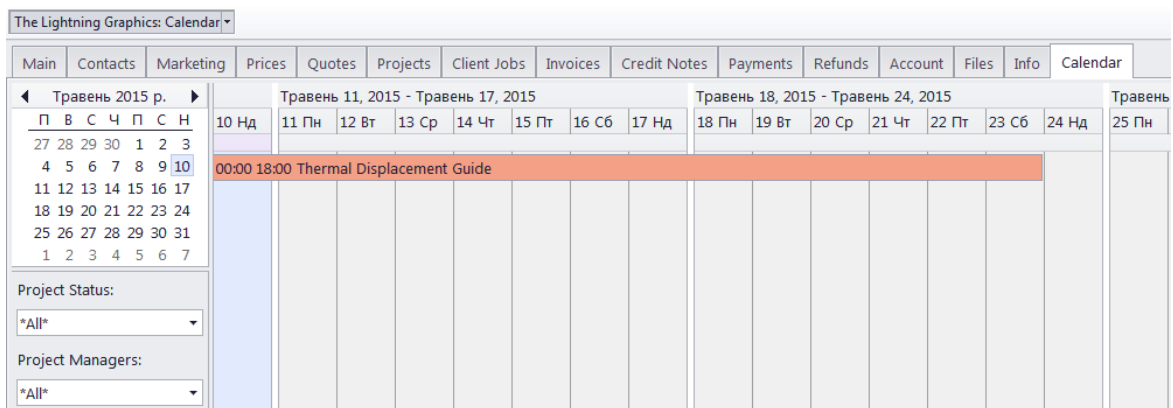
- **Subject** — maximum 100 characters long.
- **Category** — new note categories can be added with the help of the **Corporate Settings >> Categories** menu in the **Backstage** view.
- **Information** — plain text note any number of characters long.

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

#### 4.1.15 Calendar Tab of Client Window

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 canceled.

**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.

## 4.2 Client Prices window

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

**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.

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.


## 4.3 Quotes to Clients

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

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

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

To quickly create a project based on a quote, select it and click **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 a quote folder contains any files, **Projetex** will query whether these files must be copied to project folder of a 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 Edit Project window and in Project profile of Project window.

### Quote Status

A quote can have one of the following 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 status

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

## 4.4 Client Jobs

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

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

### Client Job Filters

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

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

Client jobs can also be filtered by *Project Manager* responsible for them.

If you have set *invoicing policy* for this client in this client's profile on the **Main** tab of **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 determine current status of each client job:

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

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

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

**Black** — client job is *completed*.


 **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 **Special Status** drop-down list in **Edit Job** window.

## 4.5 Invoices to Clients

**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 Account 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:

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

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

### Invoice Filters

Use **Status** filter drop-down list to display only invoices with *Outstanding*, *Fully Paid*, and *Void* status.

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

## Invoice Status

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

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

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

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

**Black** — invoice has been **Settled (paid)**.

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

**Projetex** automatically assigns statuses to Invoices depending on Payment Terms set for each client.

## 4.6 Credit Notes to Clients

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 cannot 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 its 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).

## 4.7 Payments from Clients

**Payments from Clients** 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 (except via the Mass Payments) option and existing payments cannot be deleted using this window.

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

New payments cannot be created (except with the Mass Payments function) and existing payments cannot be deleted using this window.

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

## 4.8 Refunds to Clients

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

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

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.

## 4.9 Accounts of Clients

**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)** — sum of all invoice totals of all clients.

**Total Payments (All Clients)** — 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"

This balance can be viewed separately per each of the clients in the table below.

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

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



## 5 Prospects

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.

The Prospects section offers all the same functionality as the Clients section, with the following exceptions:

- You cannot create projects, jobs, invoices, credit notes, refunds or payments for prospects. The prospect must be transferred to the Clients table first.
- The main Prospects window does not have a Calendar tab.

To transfer a Prospect to the Clients section, open the main window of the Prospects section, select the required applicant, click the hamburger icon and select the **Move to Clients** option.

## 6 Corporate Expenses

Any *expenses* other than *payments to freelancers* and *corporate jobs total cost* can be entered into database with the help of **Corporate Expenses** window. These expenses are used when calculating Account of projects.

To open the **Corporate Expenses** window, click on the **Corporate Expenses** icon in the **Corporate Team** section of the **Ribbon**.

Corporate expense record contains default fields:

**Date** - the date when the expense was handled

**Value** - value of the corporate expense

**Description** - any additional information about the expense

**Custom** tab show custom fields for particular record. New custom fields can be created in **Custom Fields** section of **Corporate Settings** in *Projetex Server Administrator*.

## 7 General Freelancers Windows

### 7.1 Freelancer Window

**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 **Freelancer** window, click **Freelancer** icon from the **Freelancers** tab of the Ribbon.

#### Freelancer Window tabs

Different tabs of **Freelancer** window represent different data, relevant to certain freelancers in your database. All data of freelancers is broken by the following tabs of the **Freelancer** window:

- **Main** tab — contains the *list of your freelancers* and their *profiles*. Here new freelancers can be entered into database.
- **Application** tab — contains application information of selected freelancer, added by HR staff.
- **Prices** tab — is used to enter and check price information of currently selected freelancer. Here prices of this freelancer can be created and edited.
- **Quotes** tab — contains quotation information, received from the currently selected freelancer.
- **Freelance Jobs** tab — gives an overview of freelance jobs assigned to selected freelancer.
- **POs** tab — is used for managing purchase orders (POs) for selected freelancer.
- **Payments** tab — holds information on payments made to the currently selected freelancer.
- **Account** tab — provides basic overview of the financial Account of selected freelancer.
- **Files** tab — provides quick access for selected freelancer's folder, as well as to other files related to this freelancer.
- **Info** tab — this tab is used for creating various notes related to the selected freelance expert.
- **Calendar** tab — gives a schematic overview of freelance jobs, presented in a form of **Schedules**

#### 7.1.1 Main Tab of Freelancer Window

**Main** tab of **Freelancer** window contains information of your freelance experts. You can add new freelancer records here or edit existing ones. The two primary areas of **Main** tab of the **Freelance Expert** window are *freelancers list* and *freelancer profile*.

#### 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 freelancers by *price*, *service* or *completed* jobs, click **Search** button.

Click any freelancer in the list to view profile of this freelancer to the right.

Once a new freelancer has been added to 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

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. Expert code will also be used as folder name of this freelancer's folder.

**Name** — Use this option to enter or edit the name of the currently selected freelancer. Freelancer's name can be no longer than 150 characters.

**Postal Address** — Enter address information of the currently selected freelancer. This information will be automatically inserted in the text of this freelancer's documents.

**Contact info** — Click this button to enter additional contact information on this freelancer.

**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 to each of your freelancers. Payment terms settings will determine when the purchase orders of this freelancer become *outstanding* and *overdue*.

**VAT number** — Regulations in some countries may require to indicate VAT codes (or numbers) in financial documents. Freelancer's VAT number, entered in freelancer's profile can be automatically displayed in this freelancer's printable documents.

**Expert currency** — Select 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 expert currency. General accounting data on experts will be presented in your *base currency*, according to 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 *freelancer quote*, *freelance job*, *purchase order*, and *payment to freelancer*.

**Locale format** — Adjust these settings to make all documents, printed for the selected freelancer use individual locale format, specific to this freelancer.

**Expert folder** — Freelancer folder contains jobs, purchase orders, payments prices and quotes information of freelancer. Projetex automatically creates, updates and maintains links between freelance experts in database and their folders. Expert code of this freelancer is used as folder name. Once the folder has been created, its location in **Business folder** is displayed in **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 FTP folders of this freelancer.

Shortcuts to these folders will be automatically added to **Files** tab of this expert's window.

**General Information** — freelancer's profile can contain any general information, relevant to this freelancer in a form of plain text note.

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

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

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

### Postal address of freelancer

Postal address of freelancer determines this freelancer's country of residence, and is automatically added to purchase orders, as well as to 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 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 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.

### 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. **Send** button becomes active only if valid e-mail address is entered.

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

### Payment Terms of Freelancer

According to the payment terms of a freelancer, **Projetex** will keep track of unpaid POs and update status of outstanding purchase orders, making them overdue, due today, due tomorrow, and so on.

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

**Minimum Fee** — this is the minimum sum the POs must accumulate, before they can be paid. Type 0 in this field to disable **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, not limited by the number of characters.

### Locale Format of Freelancer

Freelancers from different countries are very likely to have different locale formats. There is no need to change your own locale format each time you print purchase order for a freelancer, with locale format differs from yours.

To print purchase orders to freelancers according to their own *Regional and Language options* (defined in *Windows Control Panel*), *Projetex* can use 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 negative amount is indicated with a "minus" symbol put before number: -100.00. In other countries negative amount must be written in brackets: (100.00).

**Decimal Symbol** — this is the character which separates decimals. 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 the documents to a number of decimals specified here. Set this parameter to 0 if the currency of a freelancer does not have decimal units.


**Digit Grouping Symbol** — this is the symbol which will be inserted between each three digits in the number, for example in the following number *1 000 000* digit grouping symbol is space.

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

**Short Date Format** — this is format for the short date display (like *3,31,2008*). Enter required date format into this field or select one of the available formats using drop-down list. Use *d* to indicate day, *m* – for month, and *y* – for year. For example, *dd.mm.yy* will result in date like *01.02.09*. Date separator characters can be entered manually in this field too. Otherwise — settings from **Date Separator** field will be applied.

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

 **Note:** To map brief day or month ("*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 short date format by typing 3 or 4 characters in **Short Date Format** field.

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

### Next Codes of Freelancer

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 database. Prefix of these codes depends on freelancer's name. The digits after — represent the counter code.

Although this code cannot be edited, you can advance the counter forward by specifying 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.

### 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.

## 7.1.2 Application Tab of Freelancer Window

**Application** tab of the **Freelancer** window can be used to enter recruiting information of this freelancer, employment history and other HR data. Project managers can also check this tab to view any additional information on freelancer before assigning him or her to a freelance job.

Click **Application Notes** button to enter general notes about this freelancer's application.

**Application Tracker** can be used to enter records about certain events (i.e. interviews, and so on.) which occurred on certain date. 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). **Date** and **Subject** fields of a record cannot be empty.

Records in application tracker can be sorted by **Date** or by **Subject**.

## 7.1.3 Prices Tab of Freelancer Window

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 **Freelancer** window. Individual freelancer price list is maintained in *freelancer's currency*. Only one price per group of services, service and unit combination can exist in individual price-list.

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 freelancer's price list or save it in a text file by selecting the template and clicking **Save**, **Save & Open** or **Print** buttons at the bottom of **Prices** tab of **Freelancer** window.

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 on the **Settings** menu, click **Corporate** command, then click **Templates**.

Templates for prices are stored in *D:\BusinessServer\Templates\EXPERTS\FREELANCE\Prices\* folder.

## 7.1.4 Quotes Tab of Freelancer Window

**Quotes** tab of **Freelancer** window can be used to account quotes of this freelancer. To view the list of freelancer's quotes, open **Freelancer** window and switch to **Quotes** tab.

### Freelancer Quote Buttons

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

**New Quote** button opens **New Freelance Quote** window, where details of a new freelancer quote can be added.

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

**Delete** button deletes currently selected quote.

**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 following 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 status

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

### 7.1.5 Freelance Jobs Tab of Freelancer Window

**Freelance Jobs** tab displays all jobs of the currently selected freelancer. New jobs cannot be created from this tab, however, existing ones can be edited.

#### Filtering Freelance Jobs

Using **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 **PO Issued** drop-down list you can set **Projetex** to display only jobs for which 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 statuses:

Black — the freelance job is *completed*.

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

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

Red — the freelance 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

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



## 7.1.6 POs Tab of Freelancer Window

Use **Purchase Orders** tab to view purchase orders issued to currently selected freelancer. New purchase orders cannot be created from this tab, however, existing ones can be edited.

### PO Statuses

Purchase order statuses change depending on your payment terms to freelancers and your payment to 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*.

**Pink** — the purchase order is *not invoiced*.

**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 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.

## 7.1.7 Payments Tab of Freelancer Window

**Payments** tab of the **Freelancer** window displays records of payments to currently selected freelancer.

Payments to freelancers can be linked to purchase orders, fully or partially. If the sum of linked payment values, matches *PO total*, this purchase order is considered "settled". Payments are also added to company expenses on **Account** tabs.

By default, payments values are displayed in freelancer currency. Right-click the table and click **Customize columns** option to configure which payment data must be displayed.

Use **Status** drop-down list to display only payments which are still to be linked with POs, or only those, which whole amounts have been linked with POs.

## 7.1.8 Account Tab of Freelancer Window

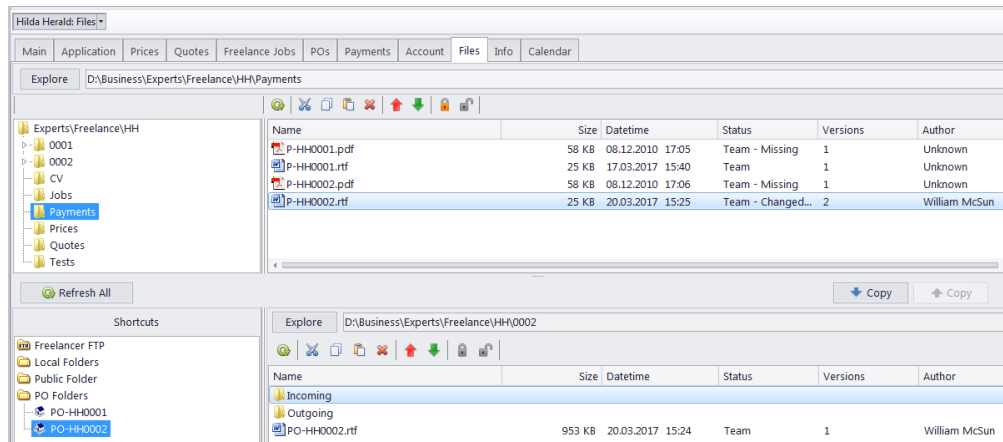
**Account** tab of the **Freelancer** window displays a brief summary of selected freelancer's accounts.

This balance includes *total of purchase orders*, issued to this freelancer, *total of payments*, paid to this freelancer, and *account balance* (total POs minus total payments).

Pie diagram represents the share of this freelancer in overall purchase orders issued to all freelancers.

### 7.1.9 Files Tab of Freelancer Window

**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.



Window contains two horizontal panes. Upper pane shows the folder tree for selected freelancer's folder and content of the currently selected subfolder. Pane underneath allows to open shortcuts. Clicking any of the **Shortcuts** will create a second file view field to the right, and open appropriate folder there. This allows to simultaneously work with two opened folders in the same window.

Files between freelancer folder and external resources (local folders, FTP) can be exchanged through **Copy** buttons.



- is used to copy file from path currently opened in Shortcuts pane to freelancer folder.



- is used to copy file from freelancer folder to path currently opened in Shortcuts pane.

Context menu contains the following specific file operations:

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

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

**Download** can be used to download the file **BusinessServer** folder on Projtex Server Administrator PC to **Business** folder on Workstation PC.

**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 **BusinessServer** folder on server and in local storage are identical.

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

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

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

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

### 7.1.10 Info Tab of Freelancer Window

**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 maximum 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.

### 7.1.11 Calendar Tab of Freelancer Window

**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.

#### Settings for 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 Calendars of Freelance Jobs

Use **Job Status** filter to display jobs only with certain status, such as *vacant* (no expert assigned), *overdue*, *completed* and so on.

Use **Project Manager** filter to display jobs only led by certain project managers.

## 7.2 Freelance Prices

**Freelance 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 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 price list templates in the **Backstage** view, click **Corporate Settings**, then click **Templates** section. Templates for prices are stored in the *D:\BusinessServer\Templates\EXPERTS\FREELANCE\Prices* folder.

## 7.3 Quotes from Freelancers Window

**Quotes from Freelancers** window provides an overview of all freelancer quotes. The options available for this window are the same as those for **Quotes** tab of **Freelancer** window. The major differences are:

- **Quotes from Freelancers** window displays all quotes from freelancers.
- New quote from freelancer cannot be created using this window.
- Existing quotes from freelancers cannot be deleted using this window.

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

A quote can have one of the following 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 status

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

## 7.4 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 **Freelance Jobs** tab of **Project** window. The major differences are:

- **Freelance Jobs** window displays all freelance jobs of all projects.
- New freelance jobs cannot be created using this window.
- Existing freelance jobs cannot be deleted using this window.

### Freelance Jobs Filters

Using **Status** drop-down list, you can select to view only jobs with a particular status: *vacant*, *not completed*, *due today* and so on.

Using **PO Issued** drop-down list you can select to view only jobs for which purchase order was issued or these, for which was not issued, or free jobs.

Freelance jobs may also be filtered by *Project Manager* responsible for them.

### Freelance Jobs statuses

Color of freelance jobs in the list is determined by their status. By default, these are:

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

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

**Red** — freelance job is *not completed* and *overdue*.

**Black** — freelance 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 status of any job with the help of **Status** drop-down list in **Edit Job** window.

## 7.5 POs to Freelancers Window

**POs to Freelancers** 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 Account 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 **POs** tab of **Freelancer** window. The major differences are:

- **POs to Freelancers** 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 **Main** tab of **Projects** window, select required project, and click **POs** tab.

To quickly create a large number of purchase orders, click **Mass POs** button.

### PO Statuses

Purchase order statuses change depending on your payment terms to freelancers and your payment to 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*.

**Pink** — the purchase order is *not invoiced*.

**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 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.

POs can also be filtered by *Project Manager* responsible for them.

## 7.6 Payments to Freelancers Window

**Payments to Freelancers** window displays all *payments* received from all *freelancers*. This window can be used to edit payments, create **Mass payments to freelancers** and calculate totals of all *Payments to Freelancers* in base currency.

Use **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 those, which whole amounts have been linked to *purchase orders*.

## 7.7 Accounts of Freelancers Window

**Account of Freelancers** window presents a simplified balance sheet of your freelancers based on your payments made to freelancers and freelancer purchase orders. 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 **View** dropdown 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 global Account, select **Base Currency** option in **View** drop-down list.

## 8 Applicants

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.

The Applicants section offers all the same functionality as the Freelancers section, with the following exceptions:

- You cannot create projects, jobs, POs or payments for applicants. The applicant must be transferred to the Freelancers table first.
- The main Applicant window does not have a Calendar tab.

To transfer an Applicant to the Freelancers section, open the main window of the Applicants section, select the required applicant and click the **Move to Freelancers** button

## 9 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.

### 9.1 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.

### 9.2 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**.



## 9.3 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.