Translation Office 3000, Version 3D + Help

© Advanced International Translations

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1. Welcome to Translation Office 3000 3D

Translation Office 3000 3D

TO3000 3D+ is an advanced piece of software, which can be easily and seamlessly integrated into the business life of freelance translators.

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

You can either browse the help topics to learn about **Translation Office 3000 3D** in a consecutive way, or invoke context–sensitive topics of the **Help System** from any location in **TO3000 3D+** by pressing the **F1 key**.

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

Contact us at

http://www.aithelp.com/

1.1. What's new in TO3000, 3D

TO3000 3D+ is our major release of a "portable headquarters" program for freelance translators.

Currently, the main new features in relation to TO3000 3D are an updated Database engine and improved compatibility with Windows 11.

1.2. System requirements

Hardware & Software	TO3000 3D+ Requirements
Operating System	Windows 7 Windows 8 Windows 8.1 Windows 10 Windows Server 2008, Windows Server 2012
CPU	1200Mhz or higher
Memory	2Gb or more
Hard Disk Space	300Mb for the initial setup plus variable space for the database*
Monitor	Any VGA/SVGA monitor with support for a minimum of 640x480 resolution and 256 colors

Note: It is important to have enough space for database (at least 300–400Mb at any given moment) so that it grows naturally without any problems and errors due to insufficient hard drive space.

1.3. TO3000 3D+ Setup

To install TO3000 3D+:

1. Download the *TO3000 3D+ setup file* using the following link:

http://download.to3000.com/SetupTO3000v3D.exe

2. Run *SetupTO3000v3D.exe* and proceed with the **Setup Wizard** steps.

2.1. During the setup procedure, TO3000 3D+ Setup will prompt you to select components to install.

- **Demo database**. Select this option if you are installing TO3000 3D+ for evaluation. This database contains some records, imitating the workflow data of a freelance expert.
- **Empty database**. Select this option to install a clean database before you begin entering your actual workflow data into TO3000 3D+. If you already have a database installed, please move away or delete this database, before running TO3000 3D+ Setup.
- **Do not install database**. If you are just updating your TO3000 3D+, and already have your database up and running and there is no need to install another one.

NOTE: As a security measure, TO3000 3D+ Setup will not overwrite an existing database under any circumstances. If you would like to install a new database, please remove or delete the existing database file manually before running TO3000 3D+ Setup.

The TO3000 3D+ database file is located in the following folder:

C:\Users\Public\Documents\AIT\TO3000, Version 3D\db\TO30003D.mdf

Please be sure not to delete this file accidentally, because it contains all your workflow data.

1.4. Upgrade to TO3000 3D+

1.4.1. Installing and registering TO3000 3D+

TO3000 3D+ can be installed and run along with earlier versions of TO3000 for evaluation purposes.

To upgrade from earlier versions to TO3000 , you will need to do the following:

1. Install new TO3000 3D+ to the same PC as the old version opting "Do not install database";
2. Run TO3000 Database Converter;
3. Convert your database from a previous version of TO3000;
4. Register TO3000 3D+.

1.4.2. Converting from earlier versions of TO3000

Depending on the version of TO3000 you used before, you will have to do different things to transfer the data from your old database into TO3000 3D+

TO3000 3D

The only thing you need to do in this case if create a backup file and restore it.

1. Launch your old TO3000 3D
2. Go to **Database Settings** and click **Backup** to create a BAK file (see Backup).
3. Launch TO3000 3D+
4. Go to **Database Settings**, click **Restore** and select the created BAK file to restore the database (see Restore).

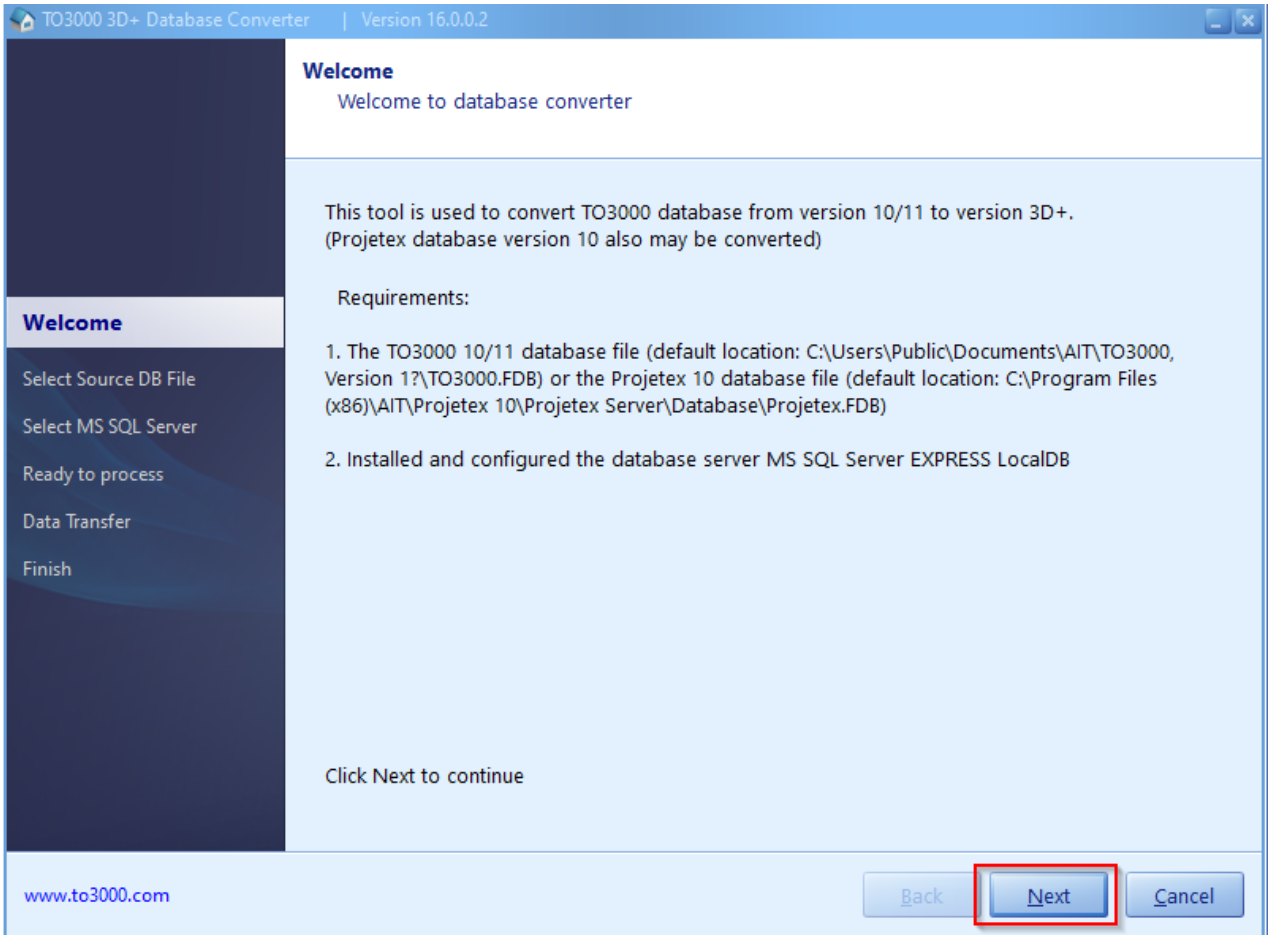
It is also possible to transfer Projetex database into TO3000 this way. You can create BAK files for Projetex on the "Database" tab of the Server Administrator utility on the Projetex server machine.

TO3000 11 and 10

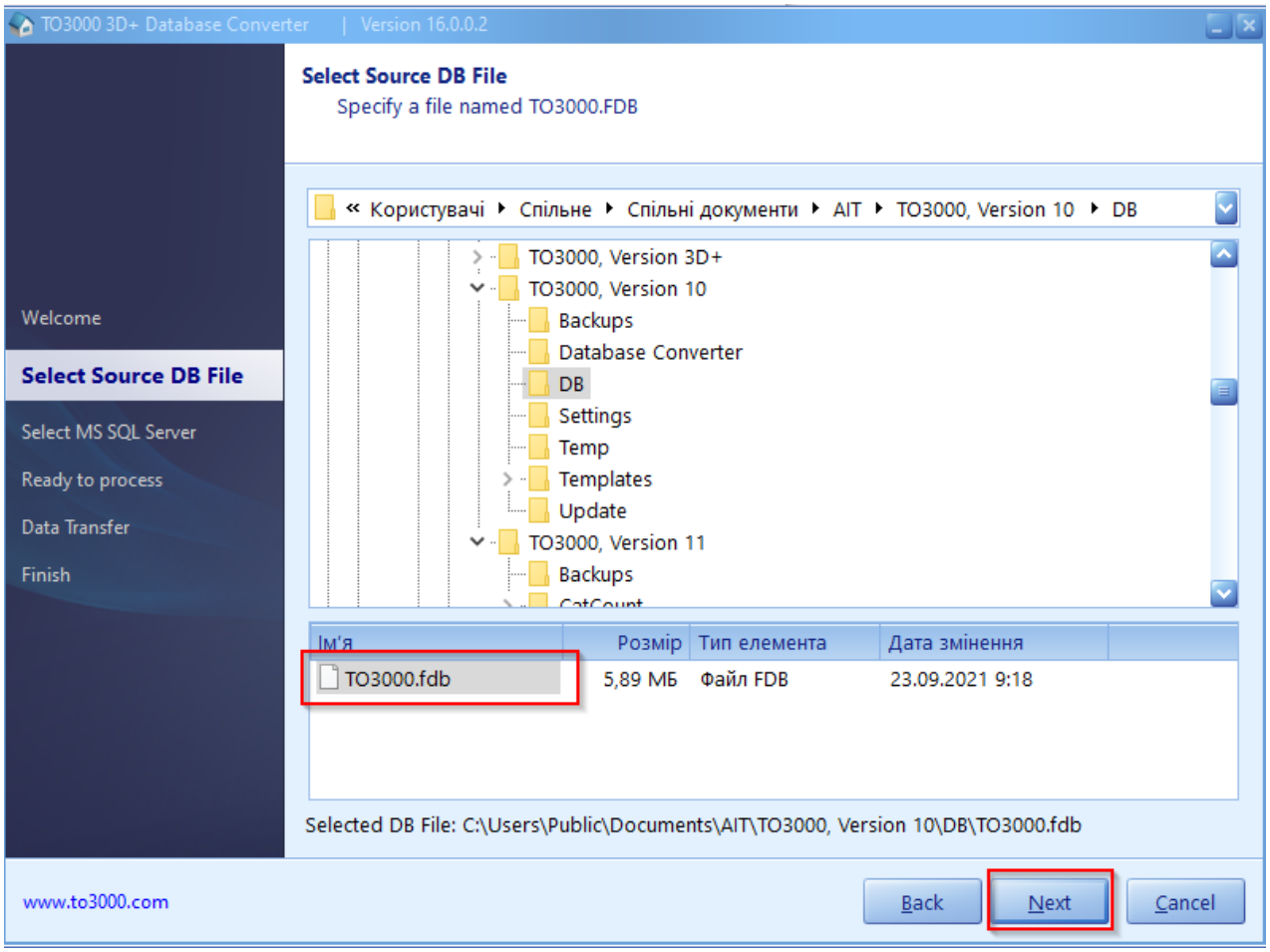
The TO3000 3D+ Database Converter is an application supplied in the standard TO3000 3D+ setup file. It allows to continue the use of a database from TO3000 10 or 11. Running the TO3000 3D+ Database Converter is a convenient way to upgrade a database from TO3000 11 to operate with TO3000 3D+.

1. Run the utility from either the startup menu or by double-clicking the TO3000_3DConverter.exe file (the default location is ...\AIT\Translation Office 3000 Version 3D\Admin\DBConverter).

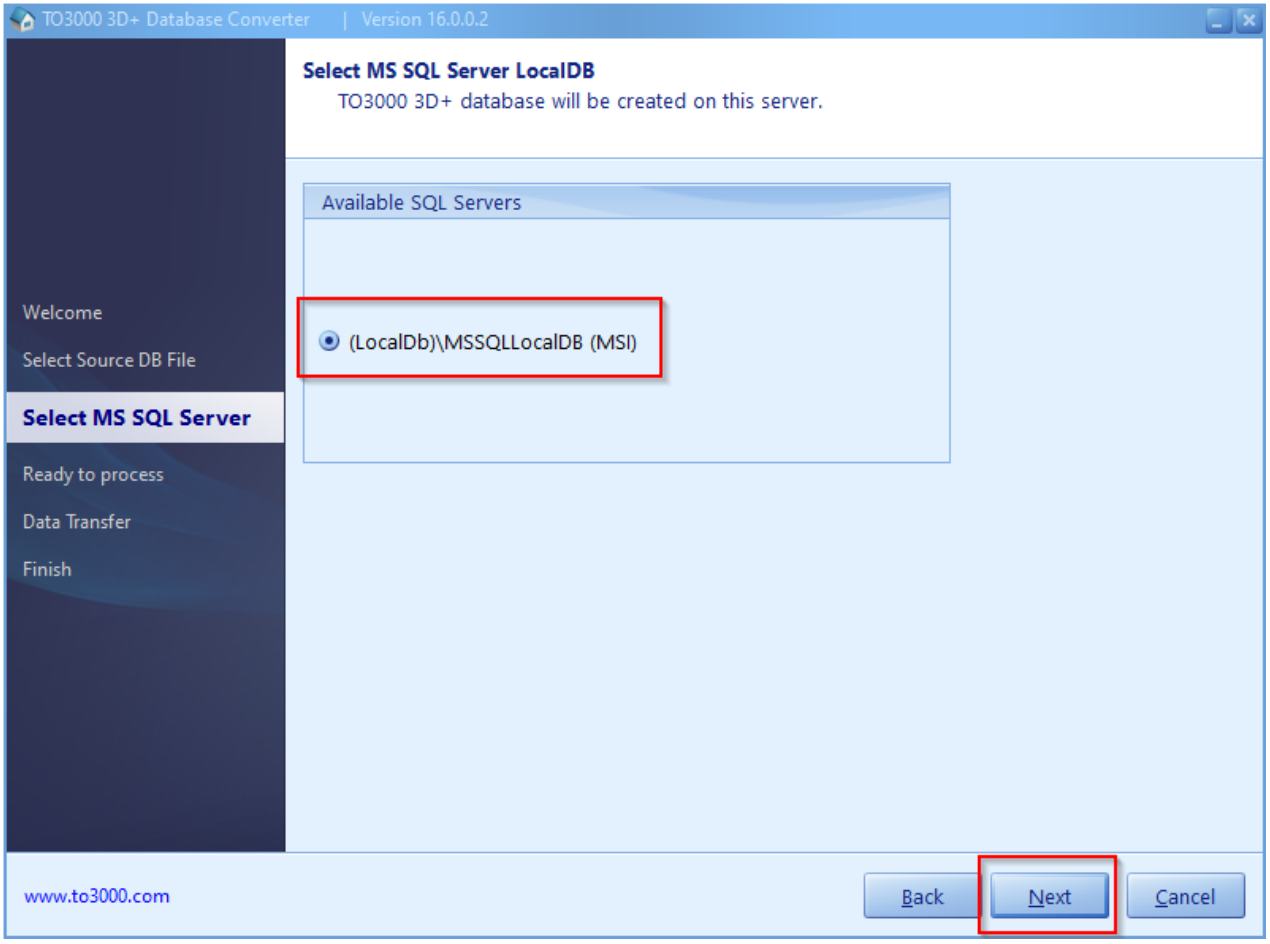
2. The TO3000 3D+ Database Converter will start with a list of requirements for it's successful operation. Make sure that the database of your previous installation of TO3000 10 or 11 is present on the computer and that the MS SQL server is set up and configured. Then click the **Next** button.



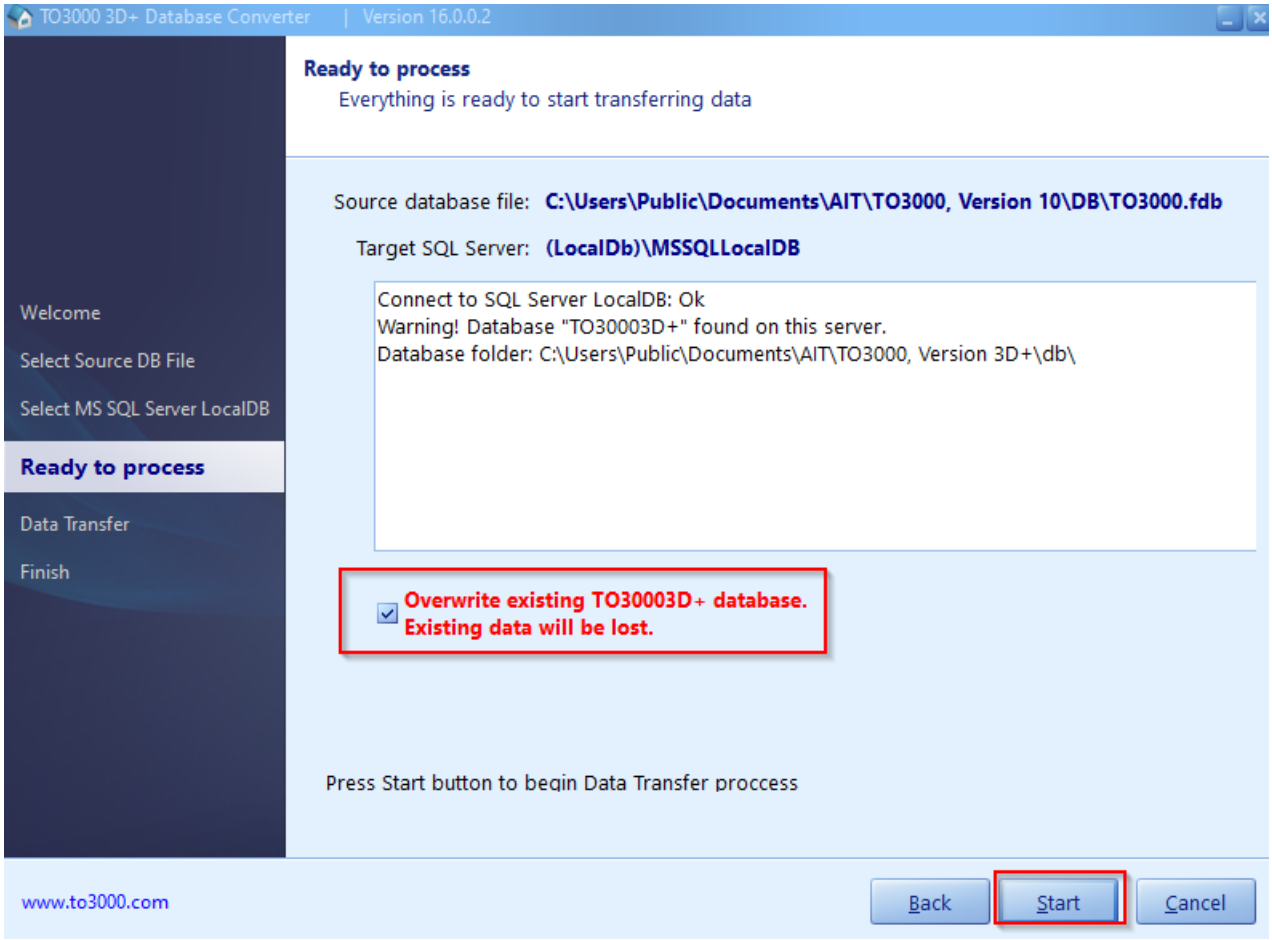
3. Navigate to the directory where your TO3000 10 or 11 database is installed. The database file should appear in the lower field. Select it and click **Next.**



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



5. The utility will connect to the server. If you installed TO3000 3D+ with the demo or empty database, the utility will ask you to confirm that you wish to overwrite the existing database. Make a backup copy of it if you do not wish to lose it. When you are ready to proceed, check the box "**Overwrite existing TO3000 3D+ database**." and click **Start.**



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

TO3000 9 or older

IF you are using a version of TO3000 older than 10, you can use the TO3000, Version 11 Database Converter first. It is an application supplied in the standard TO3000 3D+ setup. It allows to transfer a database from Translation Office 3000 (Versions 7, 8, 9 and 10) into a form compatible with the TO 3000 3D Database Converter.

1. Run the converter from either the startup menu or by double-clicking the DBConverter.exe file (the default location is ...\AIT\Translation Office 3000 Version 3D\Admin\DBConverter10\).

2. Select your current version of the TO3000 database and click **Next** button.

3. Select the **Create TO3000 11 Database** radio button.

4. TO3000 11 Database Converter will automatically locate the installation of TO3000 and select the source database file to be transferred. If the program cannot find TO3000 database, click the **Browse** button, manually specify a path to the source database file and click the **Next** button.

5. Specify a directory in which the new database file should be generated and click the **Next** button.

6. Click the **Start** button to convert the database for TO3000 11.

7. Run the TO3000 3D+ Database Converter to convert the newly created database into one compatible with TO3000 3D+.

IMPORTANT NOTE: Make sure that you convert the database under the same *Language for non-Unicode programs* as on your work computer. For example, if you have worked with French characters in a previous version of Projetex or TO3000, it is required to have French as the *Language for non-Unicode programs* in the *Region and Language* options of the computer, in which you perform the conversion of the TO3000 3D+ database.

How to change System Locale:

- You must be logged in with an account that has administrative privileges in order to change the system locale.
- The appropriate language packs should be installed on the operating system.

View the System Locale settings for Windows

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

NOTE: If you are installing TO3000 3D on a new PC, ensure that the *Business* folder used by the previous version of TO3000 is copied to the new location.

NOTE: *Templates*, *CAT schemes* and *Local Custom Filter settings* will not be imported. Please move them manually to the TO3000 3D+ setup folder. Listed below locations of *templates*, *CAT schemes* and *Local Custom Filter settings* in TO3000 V8, TO3000 V9.0, TO3000 V10, TO3000, Version 11 and in TO3000 3D:

Templates

- TO3000 V8: ...\Translation Office 3000 V8\Templates\
- TO3000 V9.0: ...\Translation Office 3000 Version 9.0\Templates\
- TO3000 V10: C:\Users\Public\Documents\AIT\TO3000, Version 10\Templates\
- TO3000, Version 11: C:\Users\Public\Documents\AIT\TO3000, Version 11\Templates\
- TO3000 3D: C:\Users\Public\Documents\AIT\TO3000, Version 3D\Templates\
- TO3000 3D+: C:\Users\Public\Documents\AIT\TO3000, Version 3D+\Templates\

CAT schemes

- TO3000 V8: ...\Translation Office 3000 V8\System\Schemes\
- TO3000 V9.0: ...\Translation Office 3000 Version 9.0\Schemes\
- TO3000 V10: C:\Users\Public\Documents\AIT\TO3000 3D+\Schemes
- TO3000, Version 11: C:\Users\Public\Documents\AIT\TO3000, Version 11\Schemes
- TO3000 3D: C:\Users\Public\Documents\AIT\TO3000, Version 3D\CatCount 4\Schemes
- TO3000 3D+: C:\Users\Public\Documents\AIT\TO3000, Version 3D+\CatCount 4\Schemes

Local Custom Filter settings

- TO3000 V8: ...\Translation Office 3000 V8\Filters\
- TO3000 V9.0: ...\Translation Office 3000 Version 9.0\Filters\
- TO3000 V10: C:\Users\Public\Documents\AIT\TO3000, Version 10\Filters\
- TO3000, Version 11: ...C:\Users\Public\Documents\AIT\TO3000, Version 11\Filters\

NOTE: In *Windows XP, the* C:\Users\Public\Documents\AIT\... folder corresponds to the C:\Documents and Settings\All Users\Documents\AIT\... folder.

1.5. Quick start

The following guidelines describe the most basic working procedures in TO3000 3D+, such as:

Setting currencies and services

Creating Client database

Creating Quotes and Projects

Creating jobs

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1. Setting currencies and services. A newly installed TO3000 3D+ will not have all the **currencies** you need. However, all required currencies can be quickly added to the database. Also, you many need to adjust your **base currency**. Having installed TO3000 3D+, please take a moment to set the system up for your business.

NOTE: The "Base currency" is the currency in which you prefer to keep your accounts. For more information about the base currency, please refer to the Multi-Currency Support topic.

➡ To enter **new currencies**:

•Run TO3000 3D+, enter the **Backstage** view and select **Business Settings**.

•Click **Currencies** to open the currencies section of the **Business Settings** menu.

•Click the **New** button to create a new currency record.

•Enter the new currency's **Descriptive Name** and a 3-letter abbreviation in the **New Currency** window.

➡ To change your **base currency**:

•Select **Backstage > Advanced Settings**.

•Click **General**.

•Click the **Base Currency** button and select your base currency.

Services in TO3000 3D+ can vary from "*translation from source to target language*" to more unusual ones like "*training*" or "*consulting*". You can enter services of any type into the TO3000 3D+ Business Settings.

➡ To add a service (language pairs translation, proofreading, DTP and so on):

•Select **Backstage > Business Settings**.

•Click Groups of Services and add a group for a new service (optional).

•Click the Services section and enter a new service by clicking **New** button.

2. Creating a Client database. There are two ways to fill your database with **Clients**: entering all the Clients manually or importing them from previous versions of TO3000. If you own a previous version of Translation Office 3000 — you can quickly import your **Clients** (along with all other data) by using the TO3000 3D+ Database Converter.

➡ To enter a **new Client** manually:

•Open the **Clients** section of the **Ribbon** and click **Client**.

•Click **Main** and then **New Client** and enter the required details.

Please refer to the Upgrade to TO3000 3D+ topic for details on importing data from previous versions of TO3000.

3. Creating Quotes and Projects. Quotes and **Projects** can be created using the Quotes tab and Main tab of the Project window respectively. A Project can also be created using data from a quote.

➡ To **create a Quote**:

•Open the **Clients** section of the **Ribbon** and click the **Client** icon.

•Click the **Quotes** tab.

•Click the **New Quote** button, to begin creating a new Quote

➡ To **create a Project** (for *With Projects Mode*):

•Open **Projects** section of the **Ribbon** and click the **Project** icon.

•Click the **Main** tab.

•Click the **New Project** button, to begin creating a new **Project**.

4. Creating jobs. In TO3000 3D+, any Project consists of a number of jobs. A job represents a certain amount (characters, words, hours, custom units) of a certain service (like translation from source to target language), assigned on a certain date and having a deadline.

The quickest way to create *Jobs* is to do so in the **Client jobs** tab of the **Project** window. For more information about jobs, please refer to Project window Client jobs tab topic.

➡ To **create Client Jobs** (for *With Projects Mode*):

•Open the **Projects** section of the **Ribbon** and click the **Project** icon.

•Click the **Main** tab and select a **Project**.

•Click the **Client jobs** tab and click the **New** button to create a *client job*.

➡ To **create Client Jobs** (for *Without Projects Mode*):

•Open the **Clients** section of the Ribbon and click the **Client** icon.

•Click the **Main** tab and select a **Client.**.

•Click the **Client Jobs** tab and click the **New** button to create a *client job*.

---

5. Issuing Invoices

TO3000 3D+ can be used to quickly issue, edit and delete Invoices to Clients and settle them by linking invoices with payments.

➡ To **create** an **Invoice to a Client**:

•Open the **Clients** section of the Ribbon and click the **Client** icon.

•Click the **Main** tab and select a **Client**.

•Click the **Invoices** tab.

•Click the **New** button to begin creating an Invoice for this client. See Creating invoices to clients

•Add required **Client Jobs**, select markups and discounts, and click the **Apply** button.

➡ To **create** a **Payment from Client**:

•Open the **Clients** section of the Ribbon and click the **Client** icon.

•Click the **Main** tab and select a **Client**.

•Click the **Payments** tab.

•Click the **New** button to begin creating a payment from this client.

1.6. Registration

1.6.1. Trial period

You are welcome to use TO3000 3D+ free of charge during the **30-day** evaluation period.

During the evaluation period TO3000 3D+ is fully functional, but the number of Clients and Projects is limited to 50.

1.6.2. Purchase information

After purchasing TO3000 3D+, you will receive an encrypted *License Key* for your TO3000 3D+ by e-mail.

NOTE: Registration implies entering the License Keys into TO3000 3D+, thus switching off the evaluation mode and removing evaluation period limitations.

1.6.3. Registering TO3000 3D+

To register your copy of TO3000 3D+:

1. Run TO3000 3D+.

2. In the **Backstage** view, click **Help > Register**.

3. Paste your TO3000 3D+ Serial Number, which you will receive by email into the **Register TO3000 3D+** dialog box, and click **Unlock**.

1.7. Workflow Modes

TO 3000 can support two Workflow Modes mirroring the two most widespread workflow management methods for Freelance Translators:

•**With Projects Mode.** This workflow mode allows to group jobs in a project.

•**Without Projects Mode.** This workflow mode allows to work with jobs directly, without creating projects.

NOTE: Workflow Modes can be changed in the **Backstage** > **Advanced Settings** > **Workflow Modes dialog**.

The Workflow Mode can be changed at any time and it will not affect the operability of TO3000.

If you have worked in **Without Projects Mode** and then changed the Workflow to **With Projects Mode**, all your previously created *client jobs* will be displayed under a project named "[Default] Client Jobs <Client Name>" (such a *project* will be created for all your *clients* that have *client jobs*).

If you have worked in **With Projects Mode** and then changed to **Without Projects Mode**, all your previously created *client jobs* will be displayed in the single list on the **Clients** > **Client** > **Client Jobs** tab.

1.7.1. With Projects Mode

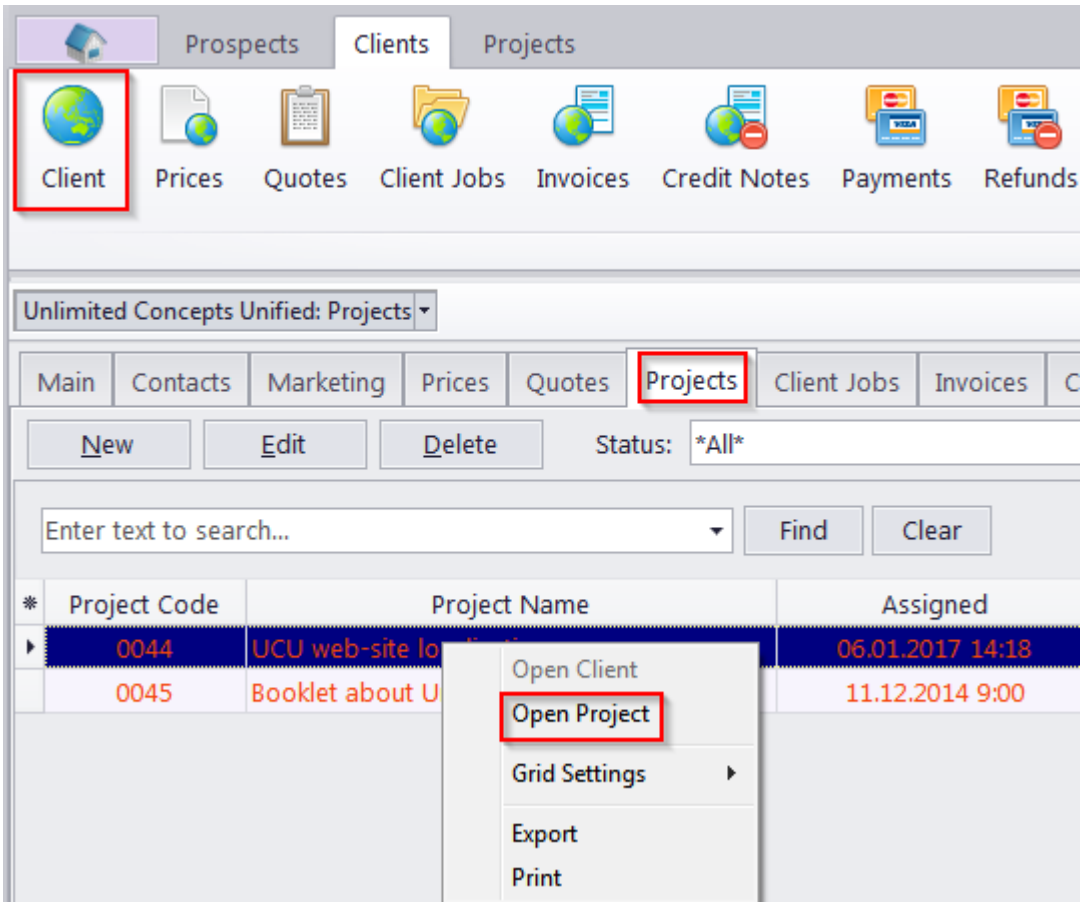
To choose **With Projects Mode**, enter the **Backstage** view and then click **Advanced Settings > Workflow Mode**. In the opened window choose **With Projects Mode** and click **OK**.

This mode has the following workflow:

1.Create a *client*. For this go to **Clients** > **Client** and click the **New Client** button.

2.Create a *project* for this *client*. For this go to the **Projects tab** of the client and click the **New** button.

3.Create *client jobs* assigned to the *project*. For this right-click the project and click **Open Project**, then switch to **Client Jobs tab** and click **New** button.



In **With Projects Mode** jobs cannot be created without a project.

With Projects Mode will be useful for freelance translators who:

•Group several jobs in a project.

•Perform several tasks for one job. For example, if you make a translation, proofreading and DTP for one job (e.g. "Brochure"), you can create a *project* with name "Brochure" and then create several *client jobs*: Brochure - Translation, Brochure - DTP, Brochure - Proofreading, where translation, proofreading and DTP are *groups of services*.

•Translate into several languages. For example if you make a translation English => German and English => Spanish for one job (e.g. "Brochure"), you can create a *project* with name "Brochure" and then create two *client jobs*: Brochure - English => German, Brochure - English => Spanish, where English => German and English => Spanish are *services*.

With Projects Mode will not be useful for freelance translators who receive separate jobs from a client and do not need to group them in any way.

1.7.2. Without Projects Mode

To choose **Without Projects Mode**, enter the **Backstage** view and then click **Advanced Settings > Workflow Mode**. In the opened window choose **Without Projects Mode** and **OK**.

This mode has the following workflow:

1.Create a *client*. For this go to **Clients** > **Client** and click the **New Client** button.

2.Create a *client job* for this *client*. For this go to the **Client Jobs tab** of the client and click the **New** button.

Without Projects Mode will be useful for freelance translators who receive separate jobs from a client and do not need to group them in any way.

With Projects Mode will not be useful for freelance translators who:

•Group several jobs in a project.

•Perform several tasks for one job. For example, if you make a translation, proofreading and DTP for one job (e.g. "Brochure"), you can create a *project* with name "Brochure" and then create several *client jobs*: Brochure - Translation, Brochure - DTP, Brochure - Proofreading, where translation, proofreading and DTP are *groups of services*.

•Translate into several languages. For example if you make a translation English => German and English => Spanish for one job (e.g. "Brochure"), you can create a *project* with name "Brochure" and then create two *client jobs*: Brochure - English => German, Brochure - English => Spanish, where English => German and English => Spanish are *services*.

1.7.3. Common workflow

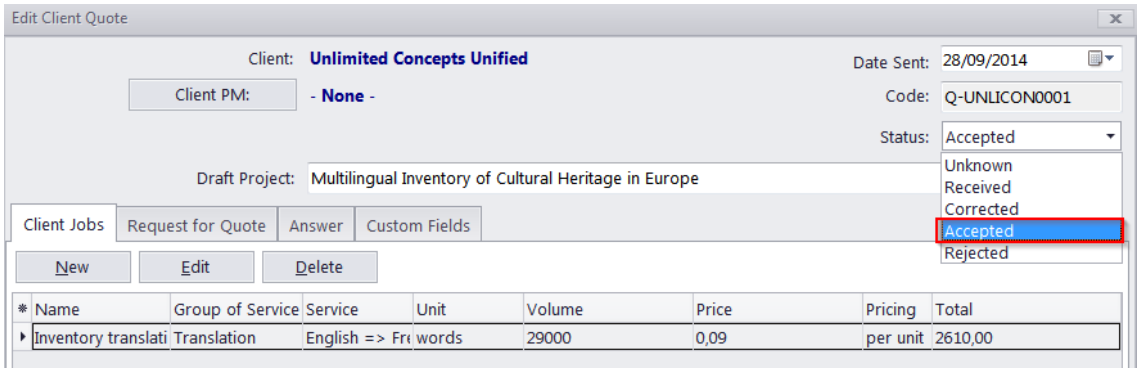
After *jobs* are created (see topics above) the workflow is commonly as follows:

1.After *jobs* had been completed, you can mark them as *completed* by editing the job's timeline (**Clients > Client > Client Jobs** tab > **Edit** button). Then go to the **Clients > Client > Invoices** tab and create a new invoice by clicking the New button. Add all necessary jobs to this invoice, select taxes, discounts and click the OK button.

2.After a payment for this invoice has been received, go to the **Clients > Client > Payments** tab, click the **New** button, type the value of this payment, switch to the **Linked with Invoices** tab, click the **New Link** button and connect this payment with appropriate invoices. Click the OK button. Alternatively, you can click the **Mark as Paid** button in the **Edit Invoice** window to create and link a payment according to the *invoice's total*.

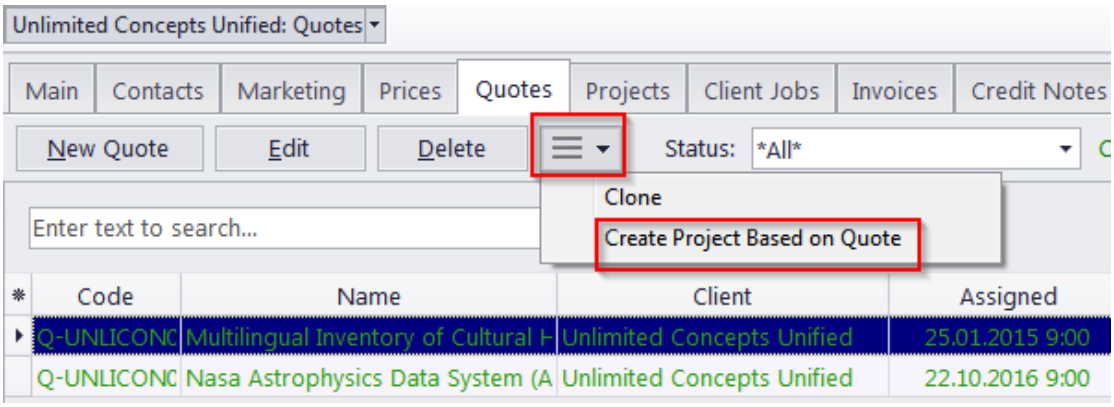
NOTE: In **With Projects Mode** projects can be marked as *completed* too. To change a *status* of a *project* go to the **Projects** > **Project** > **Main** or **Clients** > **Client** > **Projects** tab.

If you need to send a *quote* to a *client*, go to the **Clients > Client > Quote** tab and click the **New** button. Type the name of this *quote* and add all necessary *jobs* there. After your *quote* has been accepted, go to the **Clients > Client > Quote** tab, select this *quote* and change its status to **Accepted**.

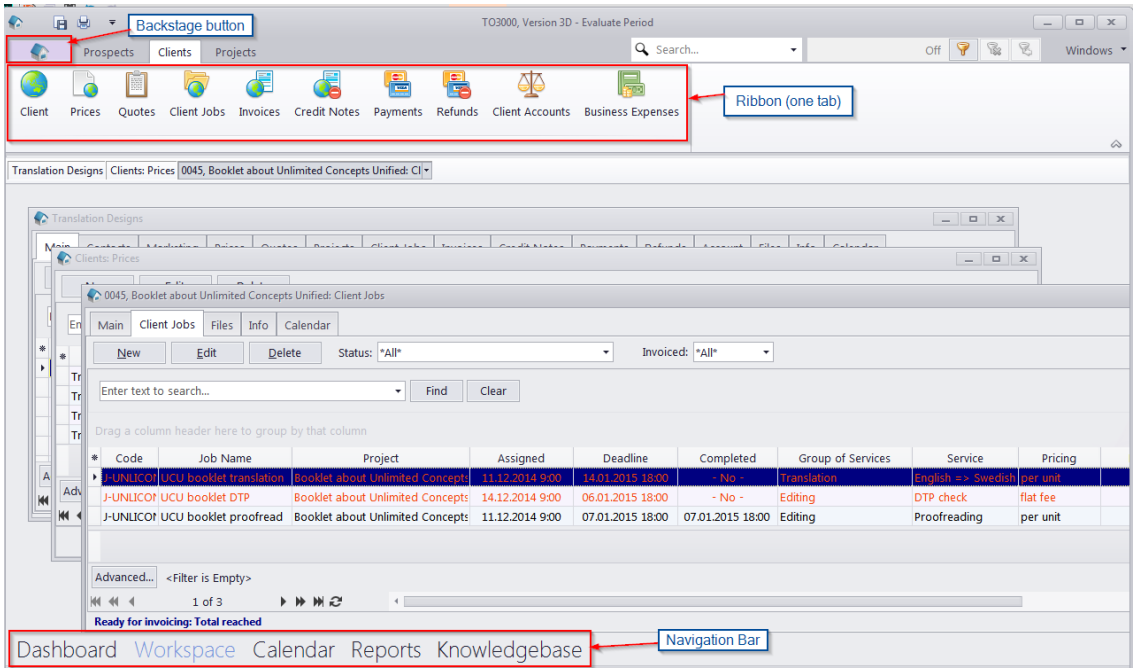


Also you can create a *project* (*client jobs*) based on a *quote*. For this go to the **Clients > Client > Quote** tab, select an appropriate *quote*, click **More...** and select the **Create Project based on Quote** (**Create Client Jobs based on Quote**) button.

NOTE: Create Project based on Quote button will appear if **With Projects Mode** is enabled. **Create Client Jobs based on Quote** button will appear if **Without Projects Mode** is enabled.



2. User interface



The Navigation Bar

The **Navigation bar** contains links to the five main sections of TO3000 3D+: the Dashboard, the Workspace, the Calendars, the Reports, and the Knowlegebase.

For more information, see the Navigation Bar topic.

The Ribbon

The **Ribbon** consists of tabs of shortcuts (icons with text captions) within the currently open section. The exact tabs and shortcuts available are different for each section.

For more information, see the Ribbon topic.

The Backstage view

The Backstage view gives access to all of the program's settings and the registration/update/upgrade interface.

See the Backstage topic for details.

2.1. Basic interface options

The majority of data in TO3000 3D+ is being stored in various tables. Each of these tables can be customized to a certain extent to adopt to each user's preferences.

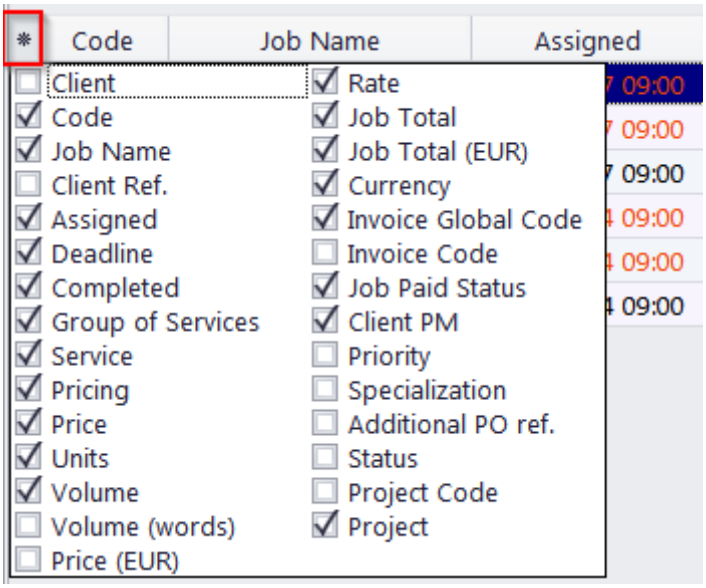
Described below are four main aspects of table customization.

2.1.1. Columns Customization

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

1. Click the Asterisk symbol in the top-left corner of a table to display a list of columns, available for that table.

2. Choose columns which should be displayed by selecting the appropriate check boxes.



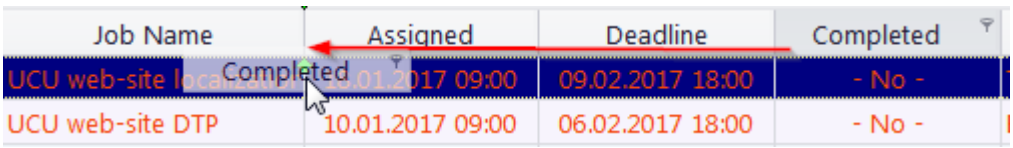
2.1.2. Moving columns

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

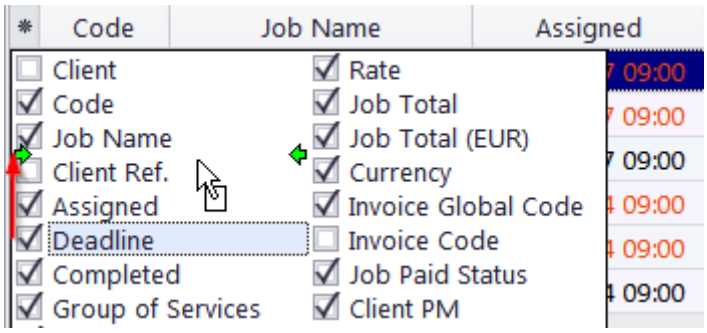
1. Click the *column caption* and hold the mouse button.

2. Drag your cursor without releasing the mouse button, to the desired column.

3. Release the mouse button. The column will be moved to the place indicated by the green arrows.



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



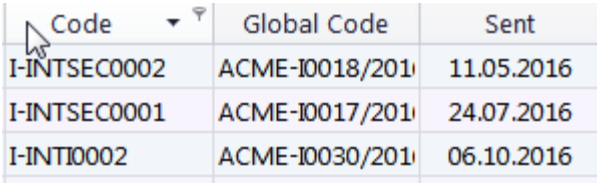
To open the **Customize Columns** window, click the Asterisk symbol ✱ in the top-left corner of a table.

2.1.3. Sorting records

The majority of data in TO3000 is stored in various tables. Each of these tables can be customized to a certain extent, in order to adapt to each user's preferences.

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

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

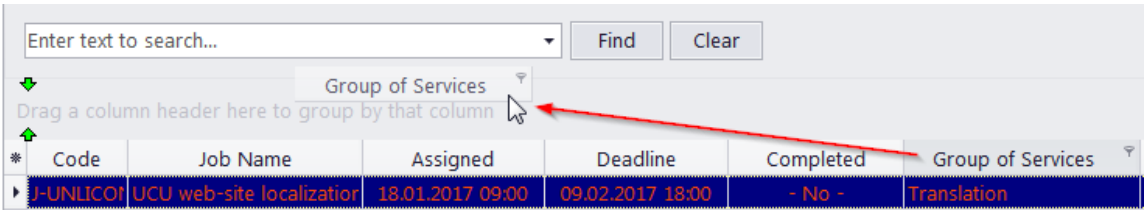


2.1.4. Grouping Records

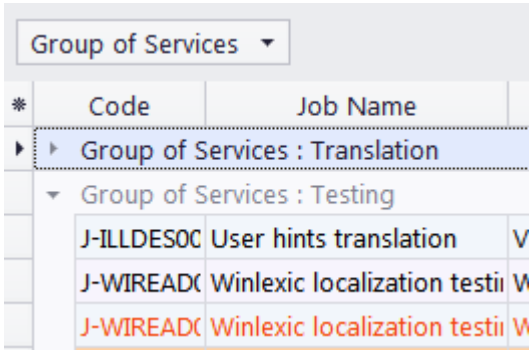
In addition to traditional sorting, records in TO3000 tables can also be grouped.

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

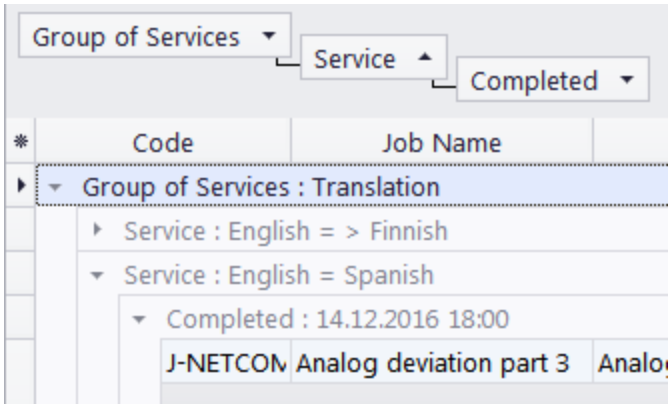
To group a table by a certain column, drag that column's header into the Group Box.



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



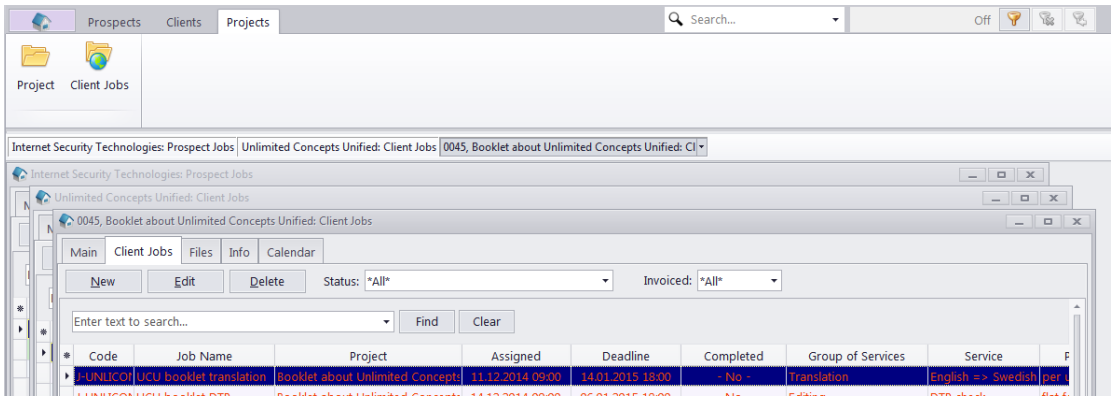
You can drag multiple headers into the Group Box to create a hierarchy of groups.



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

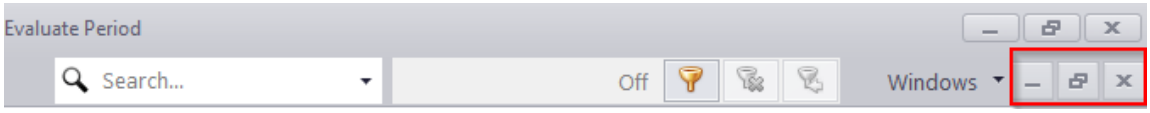
2.2. Multi-window interface

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.

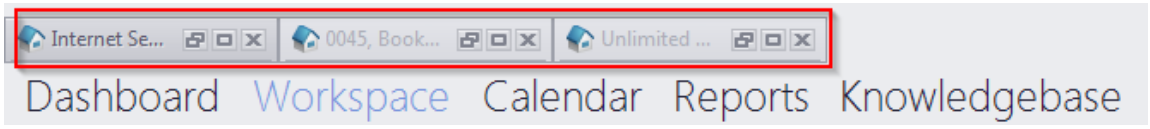


These windows can be manipulated just like the window of the program itself: moved, resized, maximized, minimized and closed.

The control buttons for a maximized window are found directly under the control buttons for the program itself.

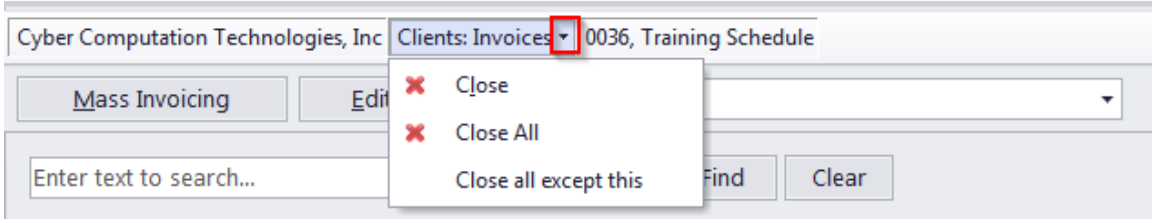


Minimized windows are lined up right above the Navigation Bar and can be moved around as well.



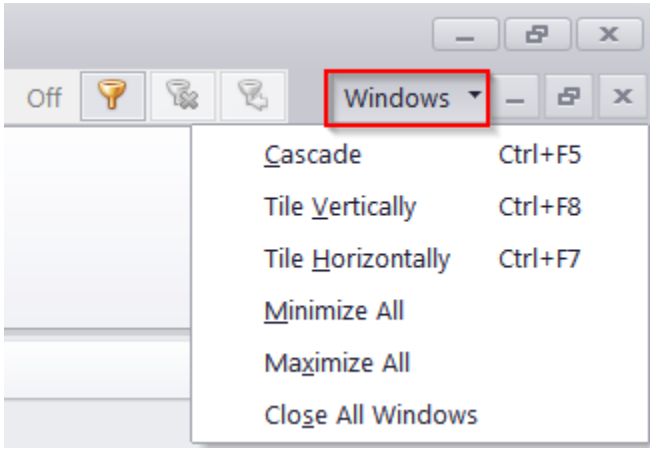
2.2.1. Jump tabs

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 a tab will bring down a menu that will allow you to close either that particular window, all windows in the current section, or all windows except the current one.

2.2.2. Quick Window Modes

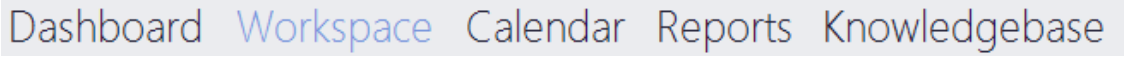


The "**Windows**" drop down menu near the top right corner of the main window offers a number of quick options for the layout of currently open windows:

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

2.3. Navigation Bar

The Navigation Bar is located near the bottom of the TO3000 window. It allows the user to switch between the five main sections of TO3000: the **Dashboard, Workspace, Calendar, Reports** and **Knowledgebase**. The active section has its name highlighted in blue.



Dashboard

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

Workspace

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

Calendar

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

Reports

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

Knowledgebase

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

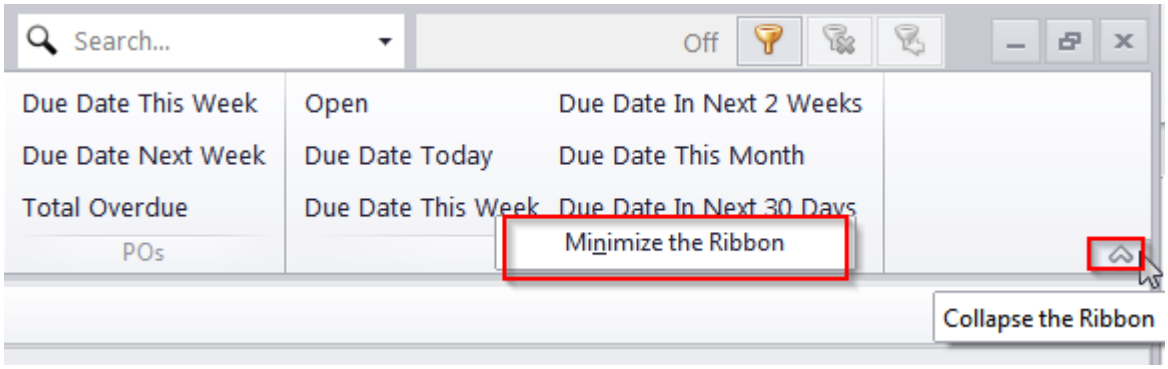
2.4. Ribbon

The Ribbon is a part of the TO3000 user interface designed to make navigating the program more intuitive.

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

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

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



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

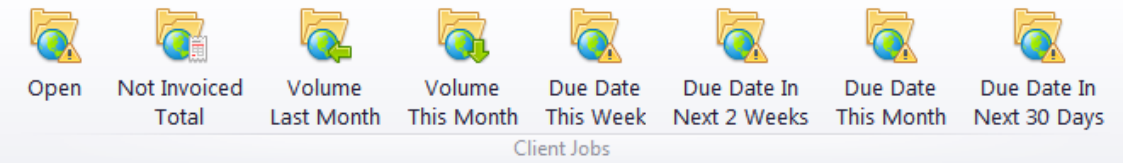
2.5. Dashboard Icons

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

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

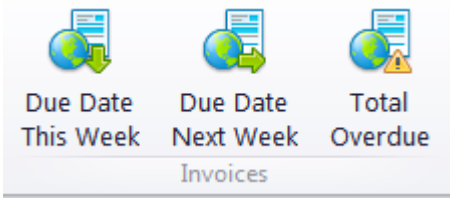
The icons are separated into four groups, according to the subject matter of the widgets.

2.5.1. Client Job Widgets



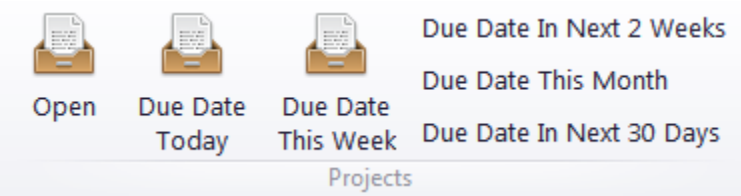
The Client Job widgets display the number and total volume of the corresponding client jobs, Except for "Not Invoiced Total", which displays the total value in the Base Currency rather than the volume.

2.5.2. Invoice Widgets



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

2.5.3. Project Widgets



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

2.6. Workspace Icons

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

For ease of navigation, the Ribbon is divided into three tabs: **Prospects, Clients, Projects** (only in With Projects mode)**.**

2.6.1. The Prospects tab

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

2.6.2. The Clients tab

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

Invoices	The **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, and perform Mass Invoicing.
Credit Notes	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.
Payments	The **Clients: Payments** window lists the payments received from all Clients. Use this window to calculate payment totals, link payments with invoices, edit payments and perform Mass Payments.
Refunds	The **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	The **Client Accounts** window displays a simplified balance sheet broken into entries for each client and based on payments from clients and invoices to clients. Accounting staff can use this window to identify which of the clients' accounts require attention. Can be viewed in the Base Currency or Client Currencies.
Business Expenses	The **Business Expenses** window can be used to make and view entries about any additional expenses.

2.6.3. The Projects tab

Project	The **Project** window displays a list of projects and all information about the selected project. Project data is broken into the following tabs: **Main**, **Tree**, **Corporate Jobs**, **Corporate Jobs**, **Freelance Jobs**, **Freelance Teem**, **JAs**, **POs**, **Account**, **Files**, **Info**, **Calendar**.
Client Jobs	The **Projects: Client Jobs** window displays a list of all client jobs stored in the database. With the help of this window you can have a quick overview of all client job statuses, calculate client job totals and edit existing client jobs.

2.7. Calendar Icons

The Calendar **Ribbon** has only one tab at first, called **Calendars**. The icons on the tab allow you to open one of the two main calendars in TO3000.

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

2.7.1. The Calendars tab

Calendar of Projects Calendar of Client Jobs	Each of the main calendars in TO3000 displays it's content (**Projects** or **Client Jobs**) in the form of colored blocks on a calendar, displaying the time constraints and current status of each project or job across the viewed time period.

2.7.2. The Options tab

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

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

2.8. Report Icons

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

2.8.1. The Clients tab

Contains Static Reports showing the total funds invoiced by clients.

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

The **Top 5/10/25** reports each come in two versions: **This year** and **All time**. They show the indicated number of clients with the greatest total invoices over either the current year or across

the entire database. They also show the overall percentage of the displayed clients' invoices in your gross revenue.

2.8.2. The Jobs tab

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

Jobs Chart	A bar diagram showing the monthly total volume of jobs created for a specific client
Jobs Table	Similar to **Jobs Chart**, but presented as a table.
Total Volume of Completed Jobs	A table showing the total volumes of completed jobs, with columns representing months and rows representing volume units.
Income and Expense Report #1 and #2	Tables showing monthly incomes and expenses, and totalling them to arrive at the overall balance. The two reports differ mainly in layout.
Sales Table	A table showing total sales for each month in the selected period.
Client Sales Report	A table showing the total volume and sum value of each kind of unit sold to a particular client.
Sales by units	A table showing the total volume and sum value of each kind of unit sold to all clients
Total Sales by Clients	Contains separate tables for each client, with the total volume and value of each "Group/service/unit" combination sold to each client.
Sales History Report by Clients	Shows the total volume and value of each unit type sold to each client over the entire history of the database. Not affected by the Global Date Filter.
Sales chart	A bar diagram showing the total monthly sales over the selected period.
Sales History chart	A bar diagram showing the total monthly sales over the entire history of the database. Not affected by the Global Date Filter.
Sales by Service	A pie diagram showing the percentage of specific services in the total sales volume. Not affected by the Global Date Filter.

2.8.3. The Invoices tab

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

Customer ledger	A table showing the total payments received from each client, further added up to totals in each currency and the grand total in the base currency.
Income Report #1	Shows a list of all payments issued over the selected period, with issue date and total in both client's currency and base currency.
Income Report #2	A table of monthly payment totals from all clients, in the base currency.
Sales chart	A bar diagram showing the total monthly sales over the selected period.
Sales History chart	A bar diagram showing the total monthly sales (based on invoices) over the entire history of the database. Not affected by the Global Date Filter.

2.8.4. The Payments tab

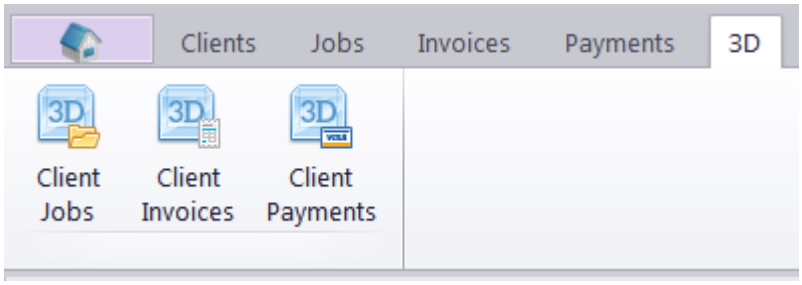
Contains reports on profits and service distribution in terms of payments.

Account Receivable	Shows the totals of expected payments from each client. Is not affected by the Global Date filter.
Customer ledger	A table showing the total payments received from each client, further added up to totals in each currency and the grand total in the base currency.
Invoice Register	Contains tables showing basic information on all invoices issued to each client (Date issued, Date due, number, value, linked value, currency).
Outstanding Invoices	A table of all invoices, which have not been fully paid yet. Is not affected by the Global Date filter.
Sales chart	A bar diagram showing the total monthly sales (based on payments) over the selected period.
Sales History chart	A bar diagram showing the total monthly sales (based on payments) over the entire history of the database. Not affected by the Global Date Filter.

2.8.5. The Custom tab

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

2.8.6. The 3D tab



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

2.9. Knowledgabase Icons

The Knowledgebase Ribbon has only one tab, also named Knowledgebase. The icons there will open one of six knowledgebases included in TO3000 3D+, each dedicated to specific type of freelancer internal notes.

Team	The **Team** knowledgebase is used for general notes.
TM	Store your translation memory files and software manuals in the **TM** knowledgebase
CV	The **CV** knowledgebase is used to store resumes and CVs for different companies and occasions.
Dictionaries	Store your general purpose and specialised dictionaries here.
Glossaries	Store project-specific glossaries here. This is especially useful if you are frequently contacted by the same client.
Other	Any useful notes and files that do not fit in other categories can be stored here.

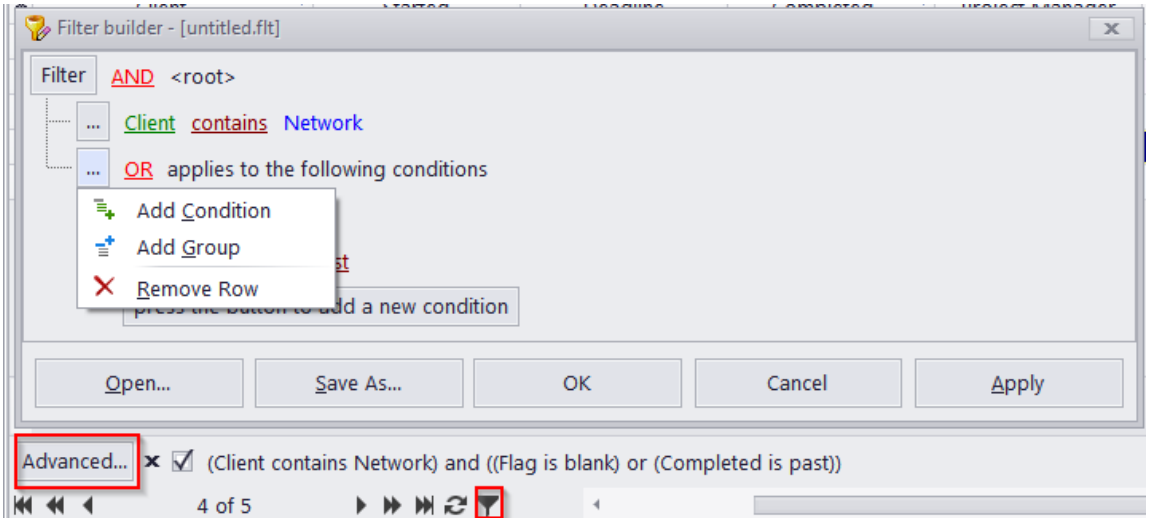
2.10. Local custom filter

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

In TO3000 3D+, the Local Custom Filter consists of three main parts: the **Filter Builder**, the **Filter Box** and the **Column filters**.

2.10.1. Filter builder

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



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

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

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

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

Standard Operators

= equals ≠ does not equal < is less than ⩽ is less than or equal to > is greater than ⩾ is greater than or equal to	Mathematical operators are used primarily on fields with numerical values. They can also be used on text strings. **Equals/Does not equal** can also be used on fields with a predetermined set of possible values.
abc contains acb does not contain	**Contains/Does Not Contain** take strings of text as values and either display or exclude all entries where the indicated field contains that string.
[a]b begins with b[c] ends with	**Begins With/Ends With** are similar to Contain, but are satisfied only if the target string is found at the beginning or end of a filed's contents.
is blank is not blank	**Is Blank/Is Not Blank** take no values. They simply display or exclude entries, where the indicated field is blank.
between not between	**Between/Not Between** take two values that define an interval and either display or exclude all entries where the indicated field's value is within the interval.
in not in	**In/Not In** can take any number of values and display or exclude all entries where the indicated field's value matches any value in the set. New values can be added to the set with the '+' button to the left of the last entered value.

Condition Groups

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

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

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

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

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

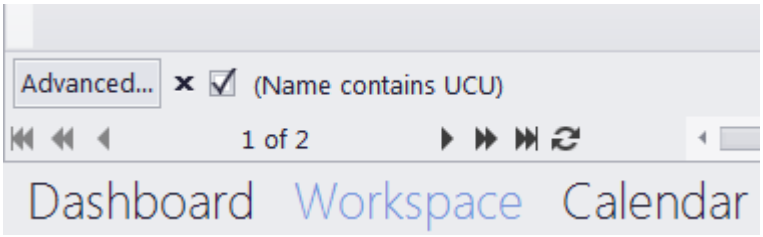
2.10.2. Filter box

The Filter Box, located just above the Page Navigation panel, displays the filter currently in effect.

The check-box to the left of the filter expression will enable/disable the filter, while the X symbol will clear it.

Clicking the description will bring up a menu of the last eleven previously used filter expressions

The **Advanced...** button opens the Filter Builder.



2.10.3. Column Filters

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

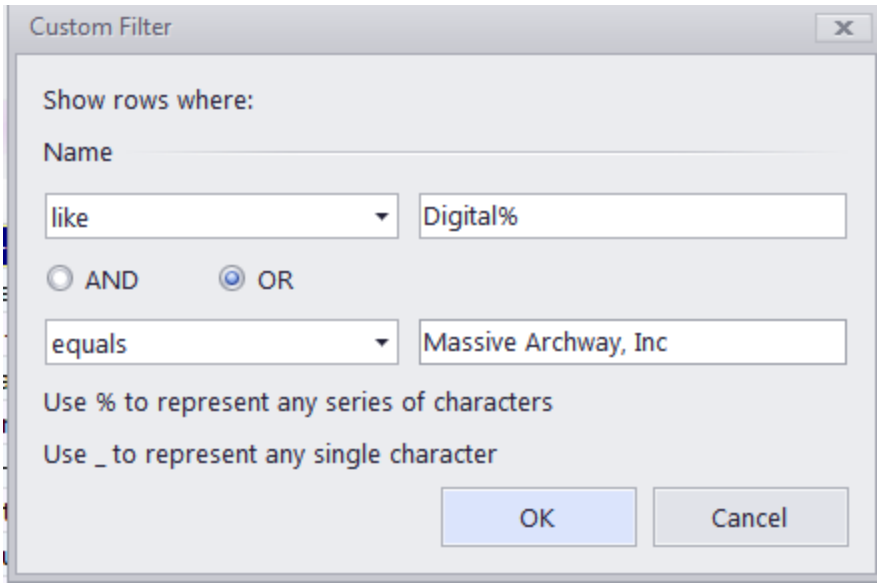
Clicking the symbol opens a drop-down menu containing a checklist of all the currently displayed values in that field, and two special options: (All) and (Custom...).

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

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

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

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



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

2.11. Global date filter

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

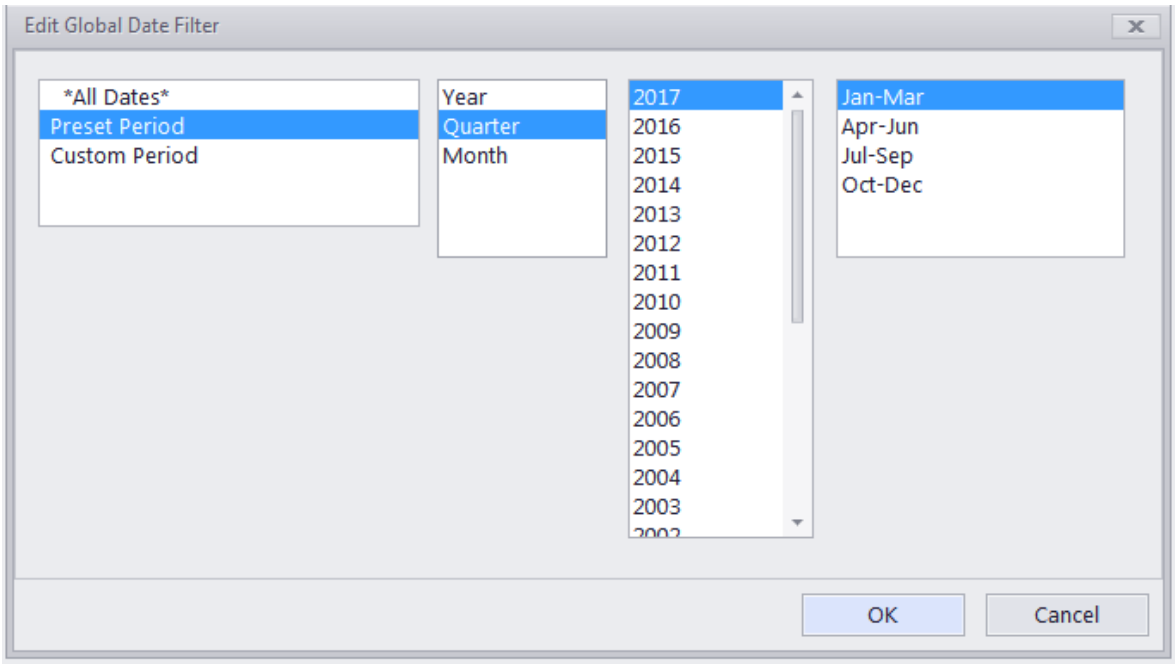
The three buttons on the filter display are, left to right: **Edit** (opens the filter's dialog window), **Off** (clears the current filter), and **Recent** (restores the most recent previously used filter).

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

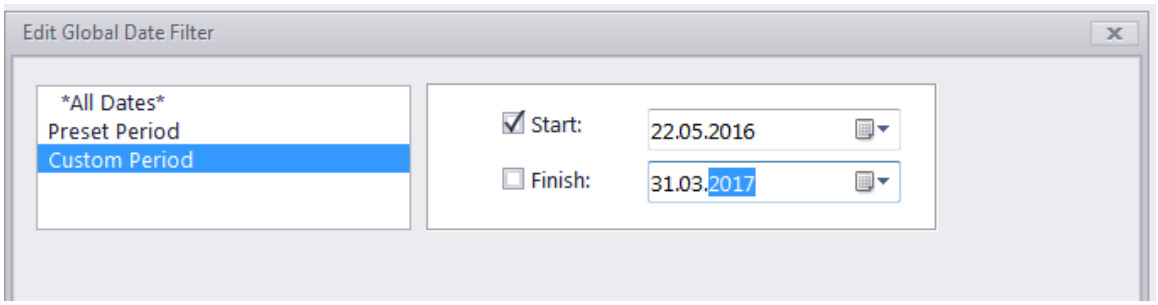
Filter Options

***All Dates*/Off** - the default setting. The filter tis not active.

Preset period - select a specific year, quarter, or month to view.



Custom period - manually select the start and/or end



Affected areas

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

In the **Prospects** Workspace tab:

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

- The **Prospects: Invoices** window.
- The **Prospects: Credit Notes** window.
- The **Prospects: Payments** window.
- The **Prospects: Refunds** window.

In the **Clients** Workspace tab:

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

In the **Projects** Workspace tab:

- The **Project** window tabs: **Main**, **Client Jobs**.
- The **Client Jobs** window.

Most **Static Reports** are also affected by the filter.

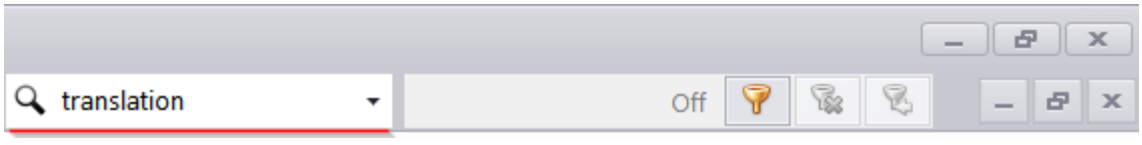
NOTE: The ***Global date filter*** affects the whole database. If you change it in one tab or window, it will change globally throughout the TO3000 3D+ database.

NOTE: The ***Global date filter*** setting is saved when you close the program and will be used next time you run TO3000 3D+.

2.12. Global Search

Use the Global Search field near the Global Date Filter to search for a specific string of text across the entire database.

Once the search is complete, a Search Results windows will open, Where you can review and refine them.

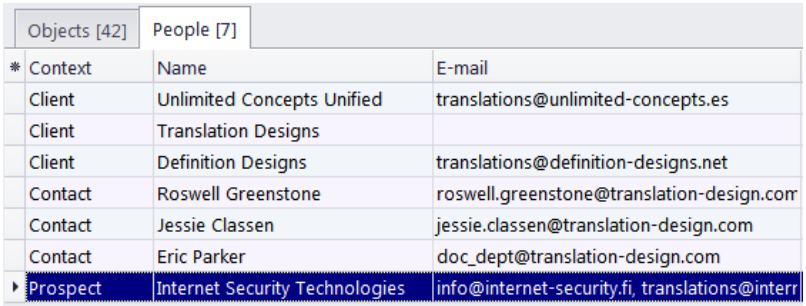


Result tables

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

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

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



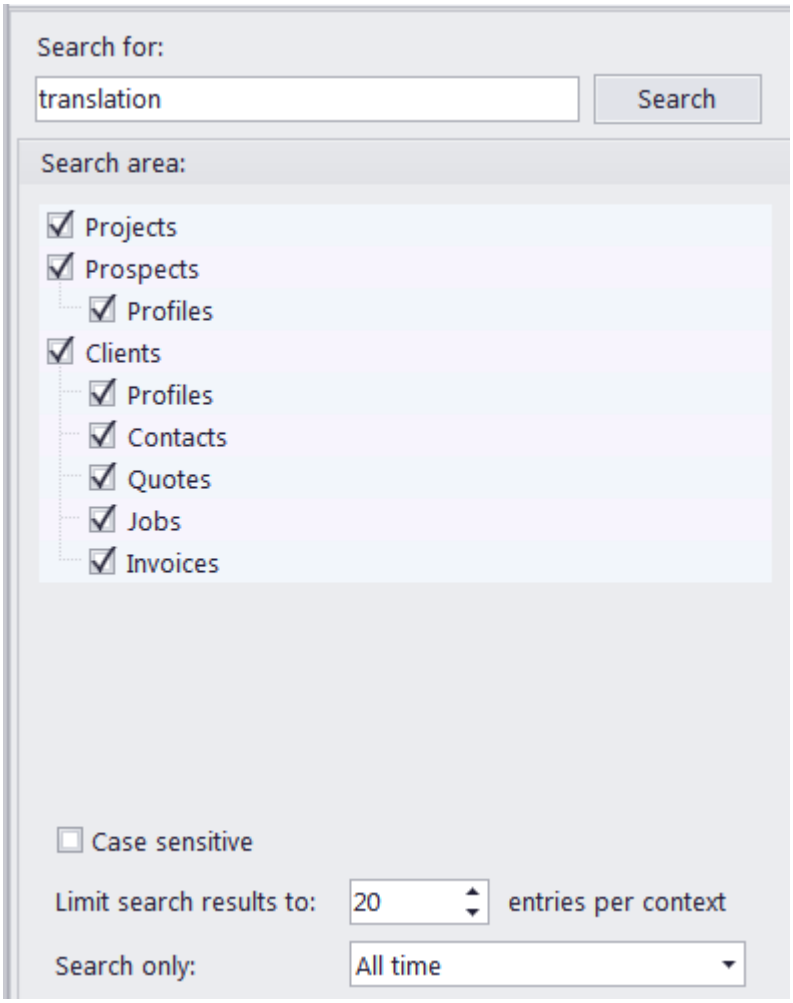
Refining search results

The left-hand side of the Search Results window consists of a dialog box used to alter the search parameters and refine the results.

The Search Area window displays all the tables to be searched. You can check and uncheck any of them to define the exact scope of the search.

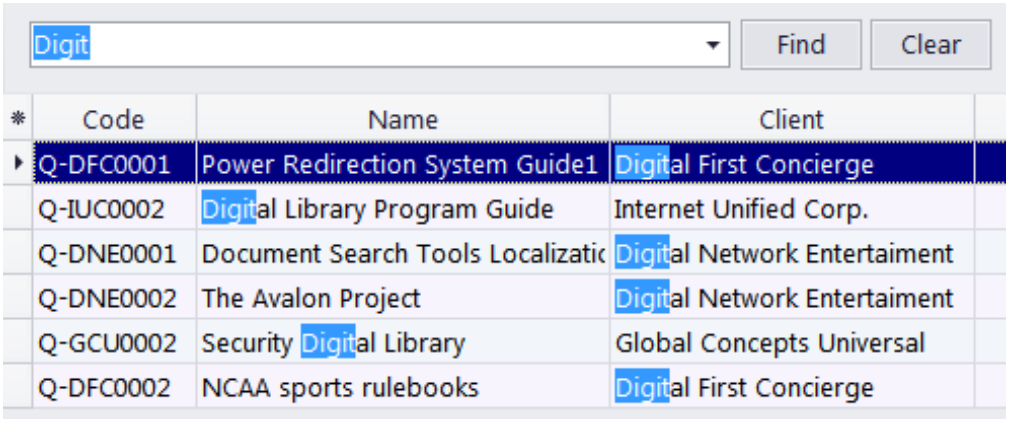
You can also determine whether the search is case sensitive, define the maximum number of results displayed from each context, and set the maximum age of entries to appear in the results (only affects Objects).

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



2.13. Find Panel

All Tables in TO3000 3D+ can be searched for specific strings of characters with the Find Panel local search function.



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

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

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

2.14. Right-click menu

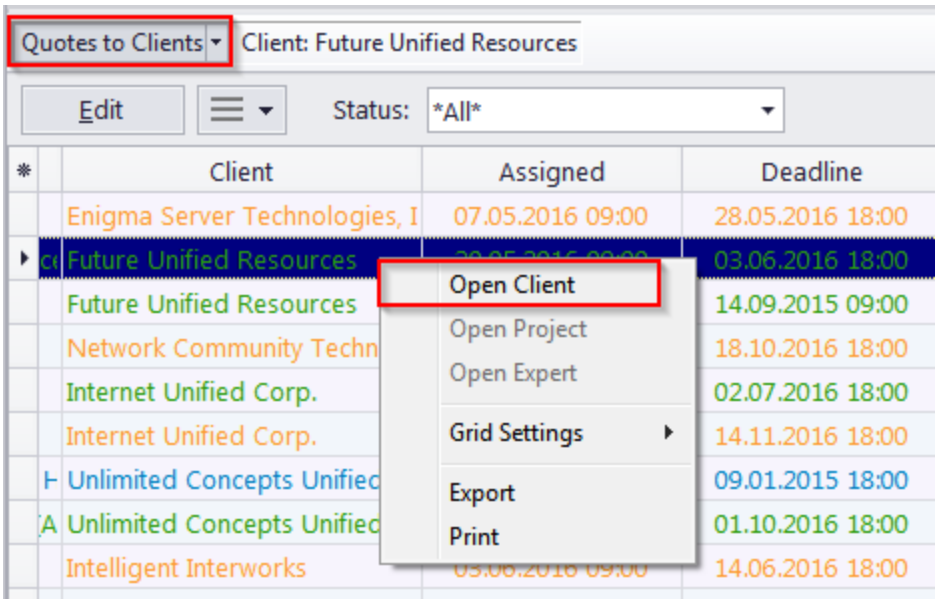
The right-click menu can be opened by right-clicking any table in the TO3000. The commands it contains depend on the table in question.

2.14.1. 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 **Clients: Quotes** window is opened and you right-clicked a certain entry, then clicked **Open Client,** TO3000 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.

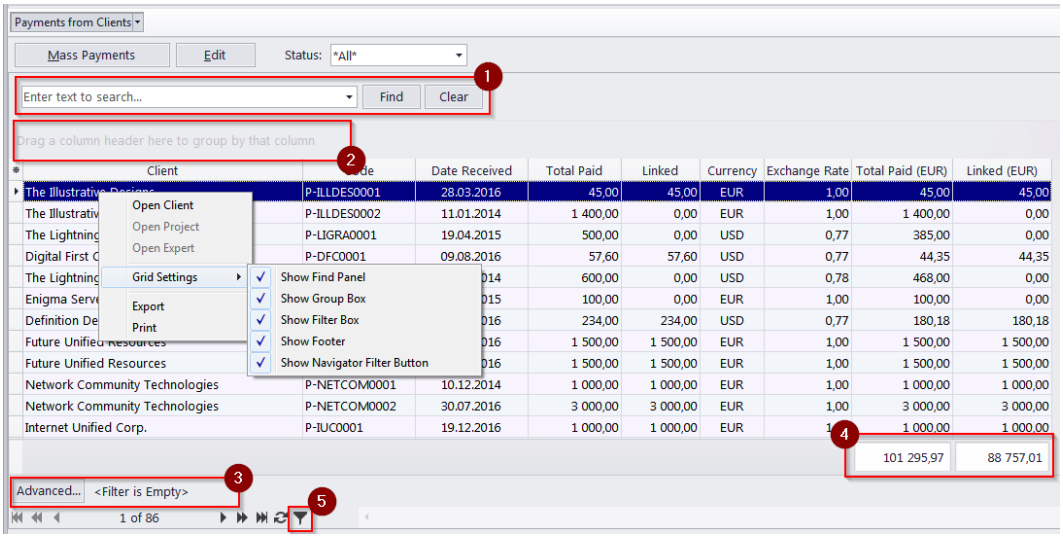
2.14.2. Grid Settings

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

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

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

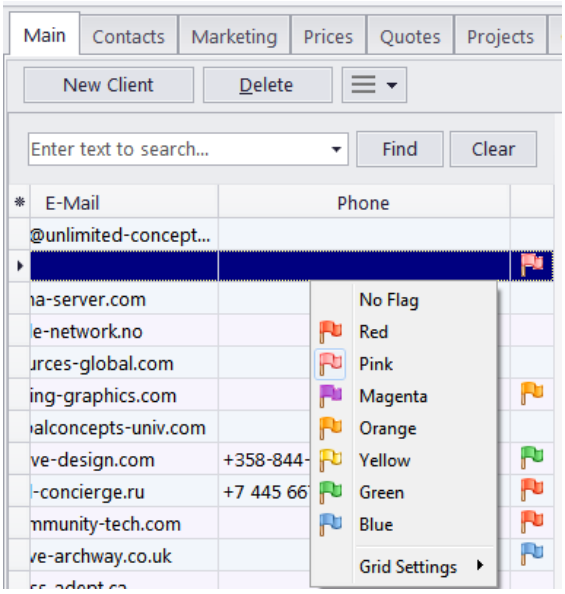
The following screenshot shows all five options enabled and numbered in accordance with the above list:



2.14.3. Flags

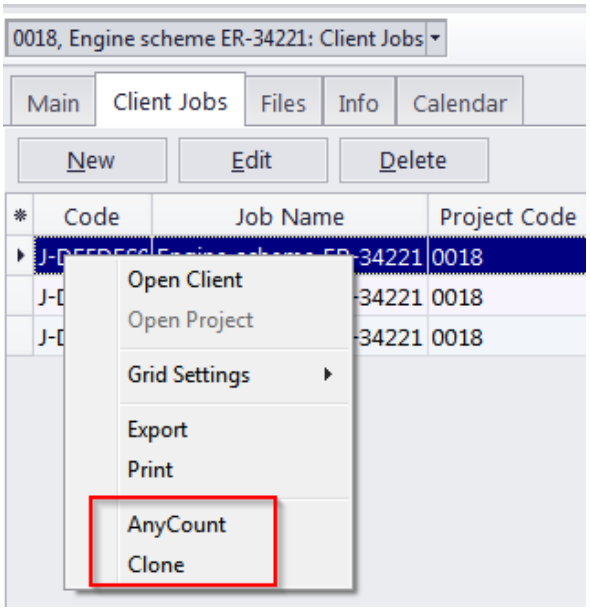
The Main tab of all Workspace tables includes a Flag field. Flags are a handy visual way of indicating any special statuses for clients or projects.

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



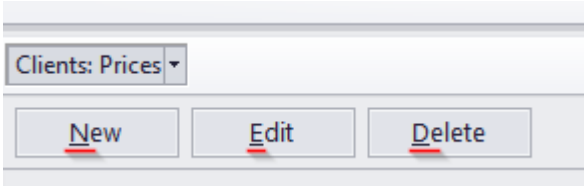
2.14.4. Special Client Job options

The Right-click menu of the Client Jobs tab in the Projects (in With Projects Mode) or Clients (in Without Projects mode) contains two special options:



2.15. Hot keys

To use *hot keys* in TO3000 3D+, press Alt and an underlined character of an appropriate button on the TO3000 3D+ window.

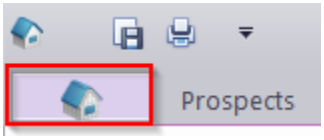


Press Ctrl+E to call up the Local Export dialog.

3. Backstage

Most settings for TO3000 are available via the Backstage view.

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

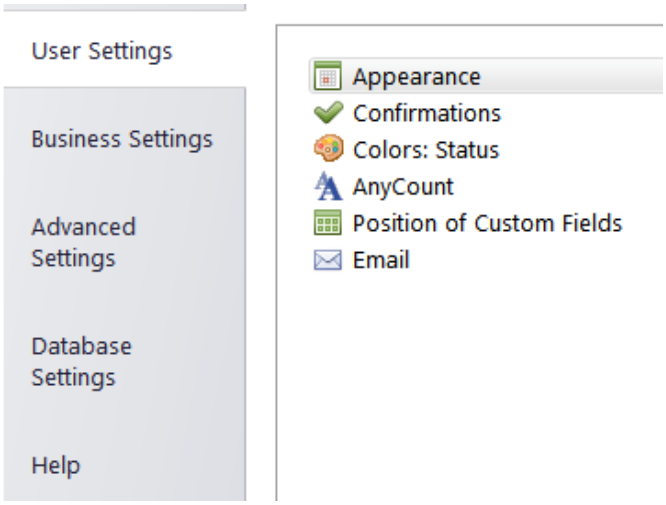


You will see the following options on the left-hand side:

- The **User settings** option gives access to settings controlling the usage and general appearance of TO3000.
- The **Business settings** option gives access to settings that affect the database, such as the list of services offered or template storage locations.
- The **Advanced settings** option gives access to settings that affect the TO3000 system itself, such as workflow modes or documentation codes.
- The **Database settings** option Give access to database backup/restoration and updating.
- The **Help** option allows you to **check for updates** and download new builds of TO3000, enter your license code when you **Register** or **Upgrade** your installation of TO3000, or view current the version and build information of your TO3000.
- The **Exit** command ends your work session with TO3000.

3.1. User settings

To open the **TO3000 3D+ Personal settings** window, enter the Backstage view and click the **User Settings** command.



3.1.1. Appearance

Here you can customize the general appearance of TO3000 3D+.

Skins - choose between several skins for TO3000.

Color Scheme Accent is only active when No Skin is selected and determines the color of the header in the main window and the sidebar in the Backstage view.

Interface Font and **Interface Font Size** - chose and size the font used for the TO3000 interface and tables.

Use System Font instantly switches the used font to the one used by your system interface.

Rich-View Font and **RichView font Size** - Choose the default font for large test fields like the General Information fields or Knowledgebase topics.

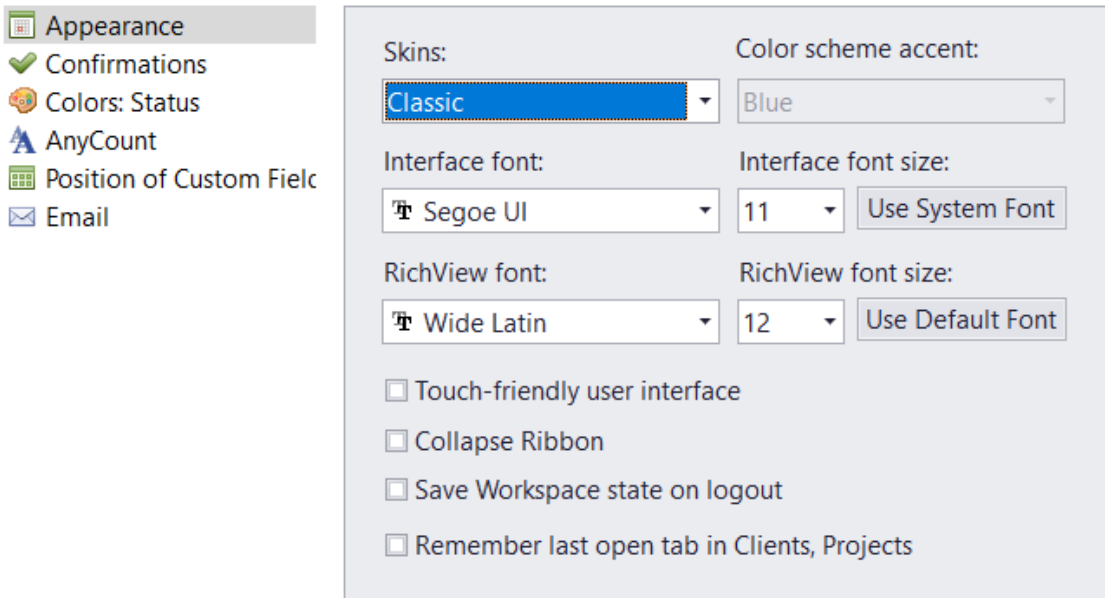
Use Default Font resets the RichView font to Times New Roman, size 12.

Touch-Friendly User Interface - check this to make interface buttons larger and easier to use with a touchscreen.

Collapse Ribbon - check to hide the Ribbon whenever it is not in active use. This can also be set by right-clicking the Ribbon itself.

Save Workspace state on logout - check to save the state of all windows open in the **Workspace** and re-open them automatically when you launch the program next time.

Remember last open tab in Clients, Projects - if checked, new Clients and Projects windows will open on the same tab the last window of the same type was closed on. Otherwise, they will always open on the Main tab.



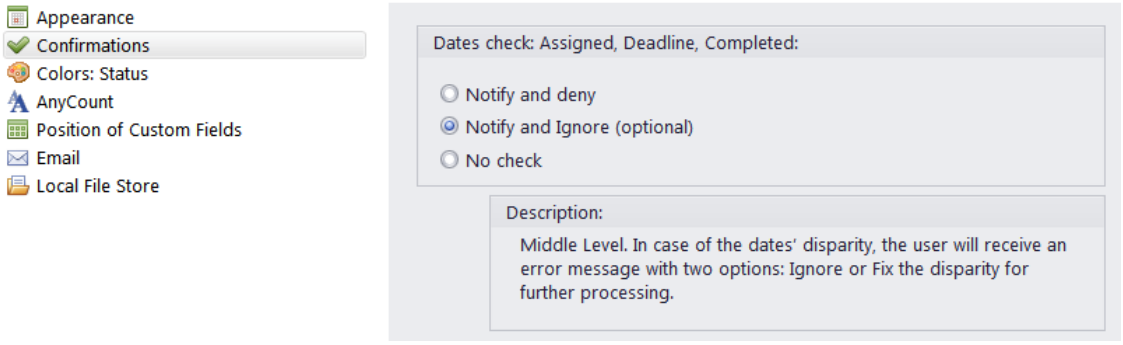
3.1.2. Confirmations

Here you can select form a number of automatic consistency checks that will help identify disparities in job and project parameters.

If the parameters violate a consistency check, a warning message will be displayed on screen when trying to enter these parameters into the database.

Date Check - checks whether the timelines within jobs and the timelines between projects and their jobs do not contain disparities, (e.g. a job's deadline being earlier than it's assignment, or a job's completion being later than the completion of it's parent project). There are three options for Date Check:

- **Notify and Deny** - an error message will appear and the new data will not be entered.
- **Notify and Ignore (optional)** - a warning message will appear, and ask the user whether they want to ignore the disparity and enter the new data.
- **No Check** - Date Check is disabled completely.



3.1.3. Colors: Status

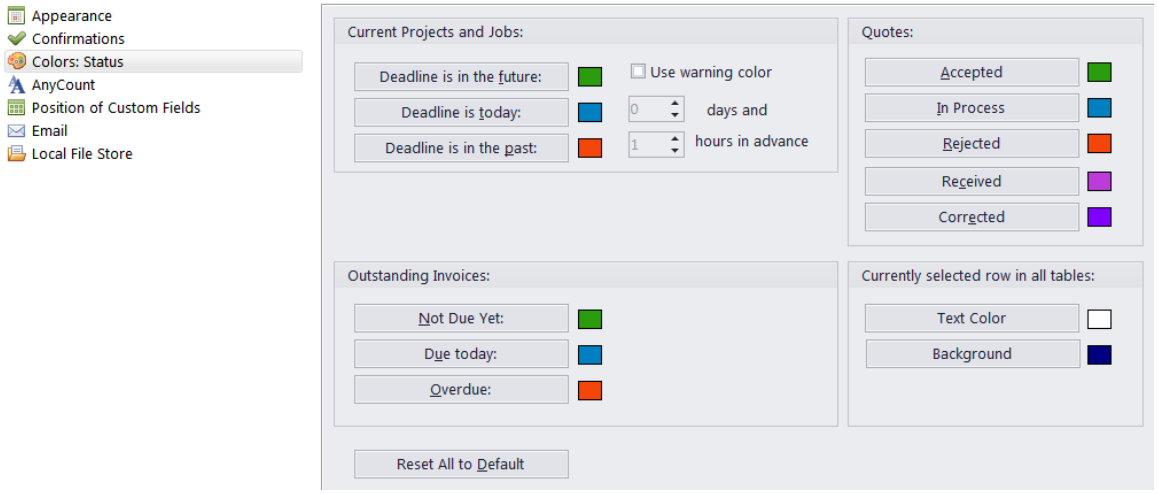
To make job, project, quote and invoice tracking more effective, TO3000 3D+ uses different colors to mark records with different statuses.

You can change the colors to mark off item status on the **Colors: Status** tab of the **User settings**.

To open the **Colors: Status** tab, go to **Backstage > User Settings** and click **Colors: Status**.

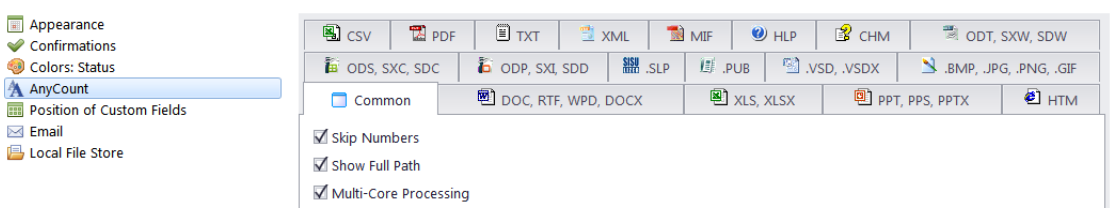
Use the corresponding buttons to open a color panel and set the color for each status of q**uotes**, c**urrent projects and jobs**, o**utstanding invoices**.

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



3.1.4. AnyCount

You can specify AnyCount settings (general and specific for different file formats) on the **AnyCount** tab of the **User Settings** window.



Common options

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

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

Multi-Core Processing should only be enabled on multi-core machines.

File type specific options

To configure counting options for specific file types, click the tab with the required file type. Different file types have different options, mostly concerning which types of contents should and should not be counted.

NOTE: You can perform counts of .wpd files only if you can open them with Microsoft Word, i.e. you need special Microsoft Word packages for working with .wpd files to be installed.

3.1.5. Position of Custom Fields

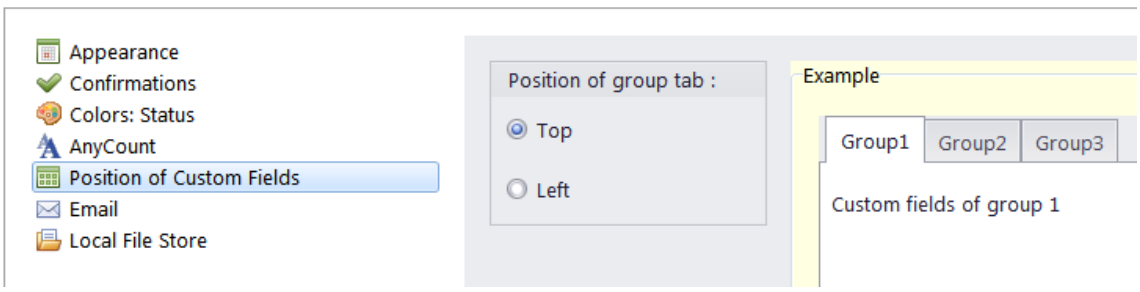
To fit your individual needs and add different kinds of additional information you can create custom fields of various types: *number, checkbox, string, text, date, time, date and time*, for each major part of the database — **Clients**, **Projects/Prospects** and **Business Expenses**. Custom fields can be grouped into custom groups.

Custom fields can be added on the Custom Fields section of the **Advanced settings** window.

On the **Position of Custom Fields** section of the **User settings** you can change how custom field groups are displayed.

To open the **Position of Custom Fields** tab, go to **Backstage > User Settings** and click **Position of Custom Fields** in the left part of the window.

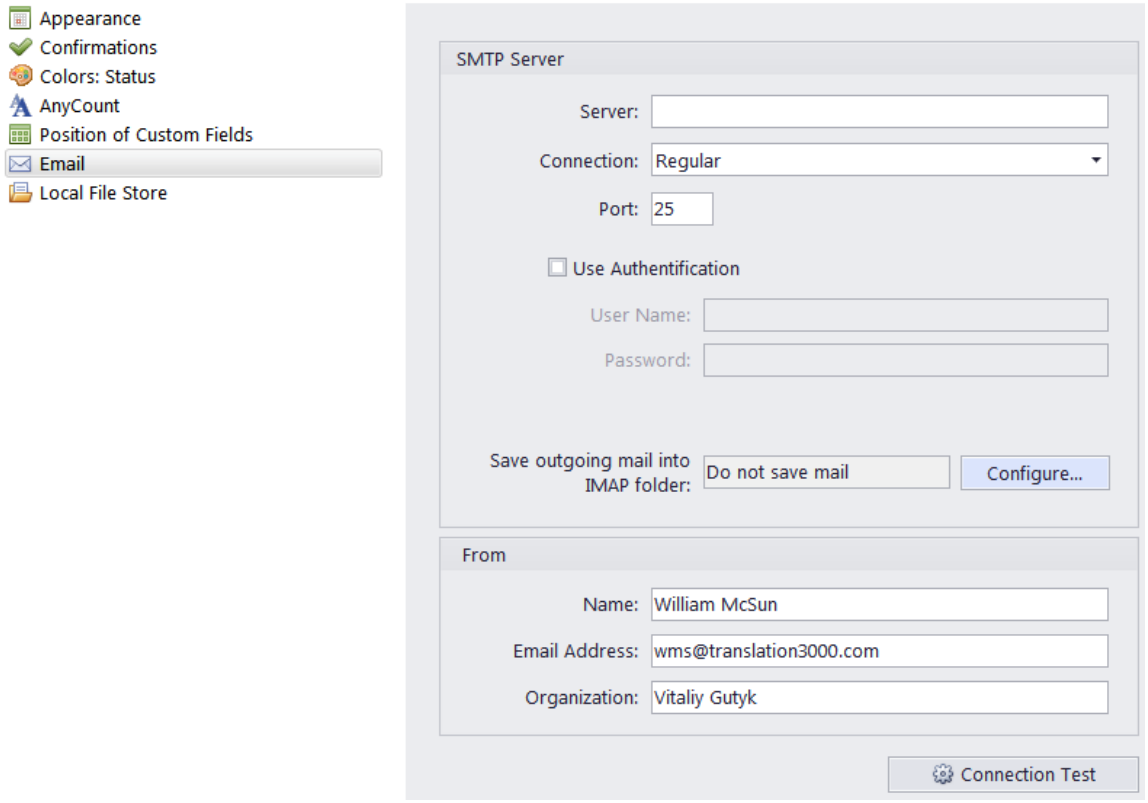
Choose either the Top or Left option to place custom groups' tabs in the corresponding location.



3.1.6. Email

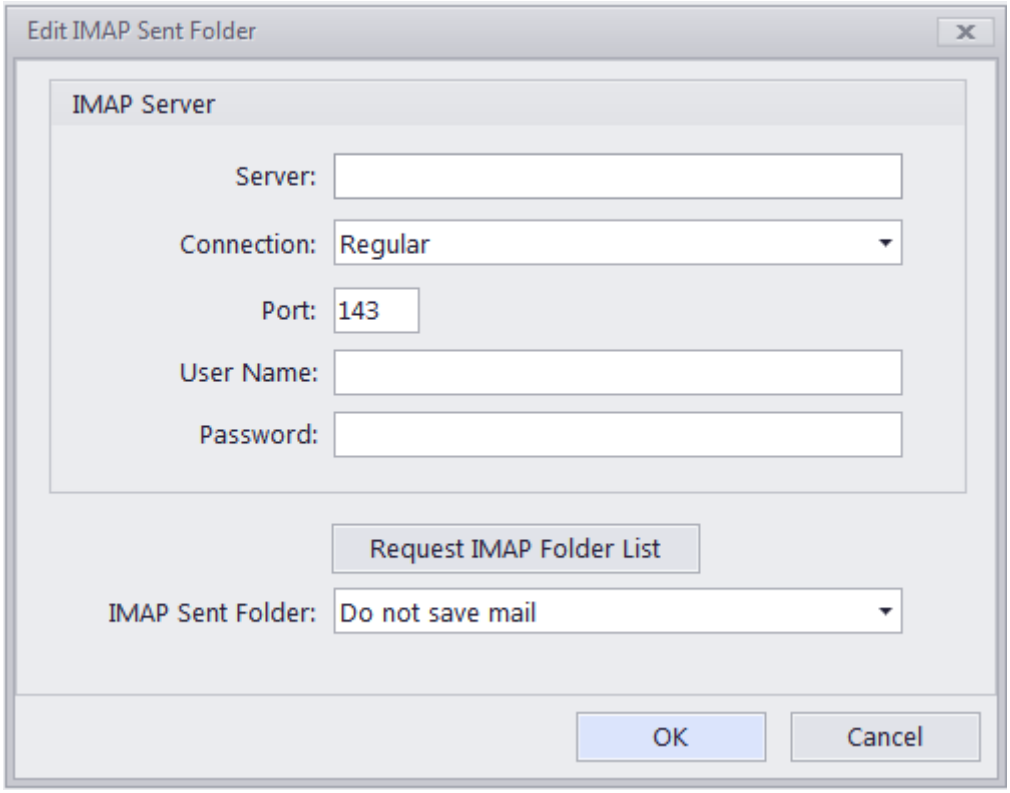
Here you can set up an e-mail connection for TO3000.

Enter the Address, connection type, and access credentials (if needed) for your SMTP server.



Also you can set up an IMAP folder to store your outgoing mail:

1. Click **Configure** to open the Edit IMAP Sent Folder window.
2. Enter the Address, connection type, and access credentials to the IMAP server.
3. Import the server's folder list and choose the folder for your Sent mail.

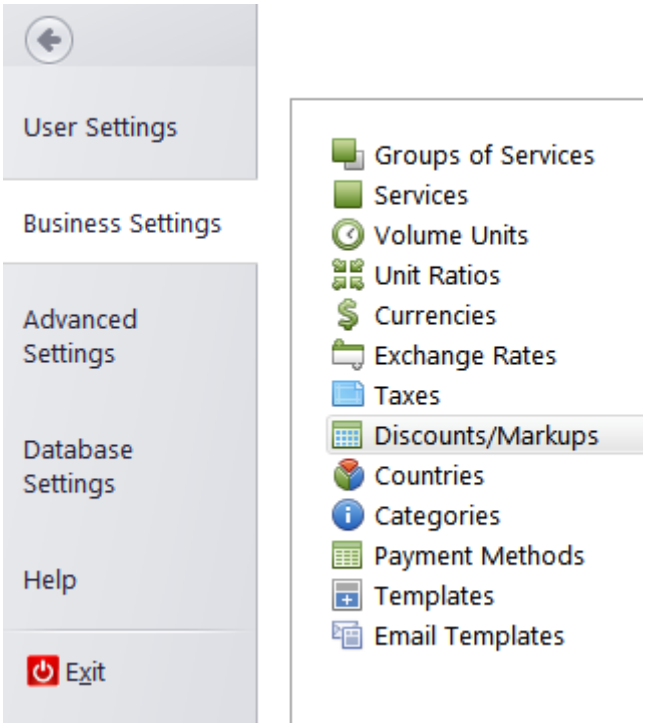


You can also specify the default 'From' line of your TO3000-generated e-mails by entering your name, e-mail and company name.

Click **Connection Test** to check if the connection parameters were entered correctly.

3.2. Business settings

To open the **Business Settings** window, enter the Backstage view and click the **Business Settings** option.



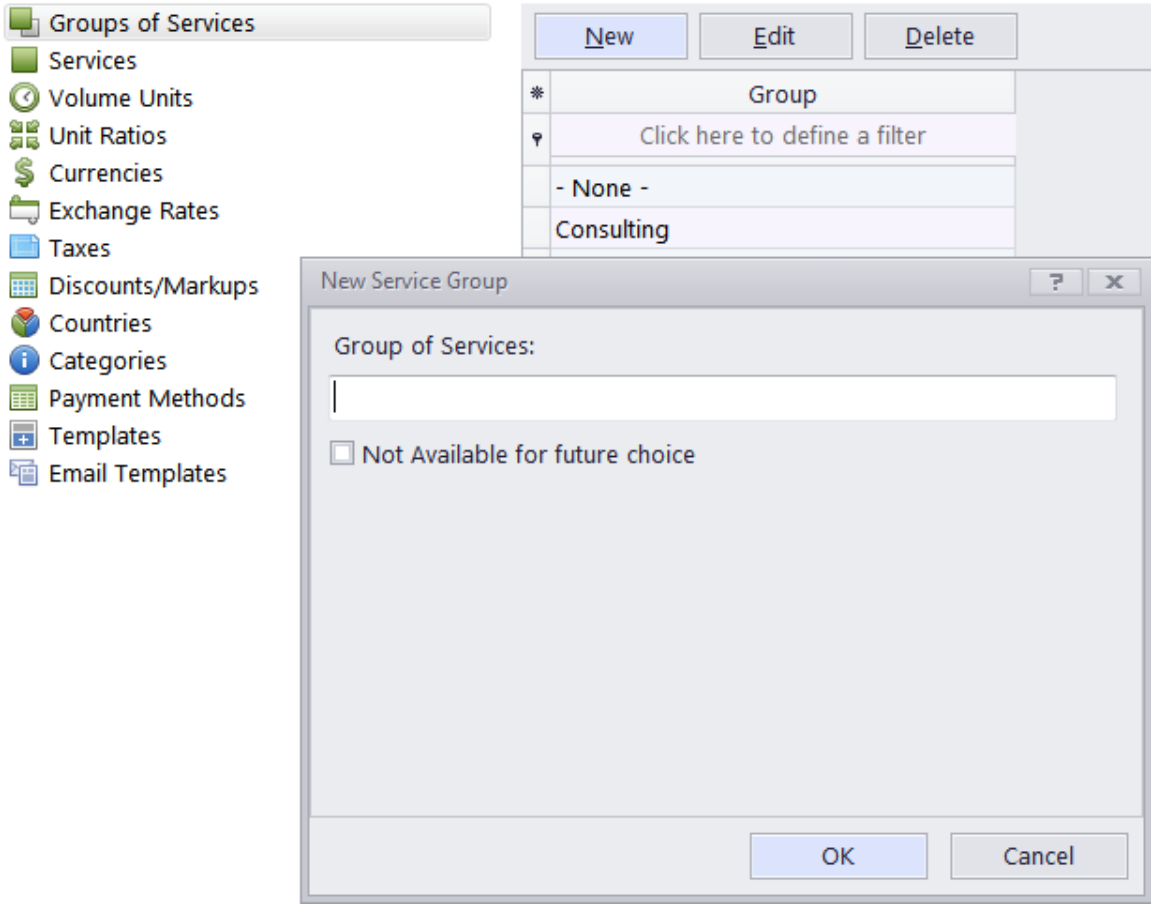
3.2.1. Groups of Services

On the **Groups of Services** tab you can specify the kinds of services you offer to your clients (e.g. translating, editing etc.). When creating jobs or setting prices in TO3000 3D+ you will have the possibility to specify the group of services, selecting it from the list created here.

To create a new ***group of services*** click the **New** button and enter the name of the ***group*** in the **New Service Group** window displayed (50 characters maximum).

Checking **Not Available for future choice** will prevent the group from appearing in the drop-down lists of the New/Edit Job windows.

A group of services cannot be deleted if it has any services in it.



3.2.2. Services

On the **Services** tab of the **Business Settings** window tab you can enter a list of services you offer to your clients; (e.g. translating from English to French). While creating jobs or setting prices in TO3000 3D+ you will have the possibility to specify the service, selecting it from the list created here.

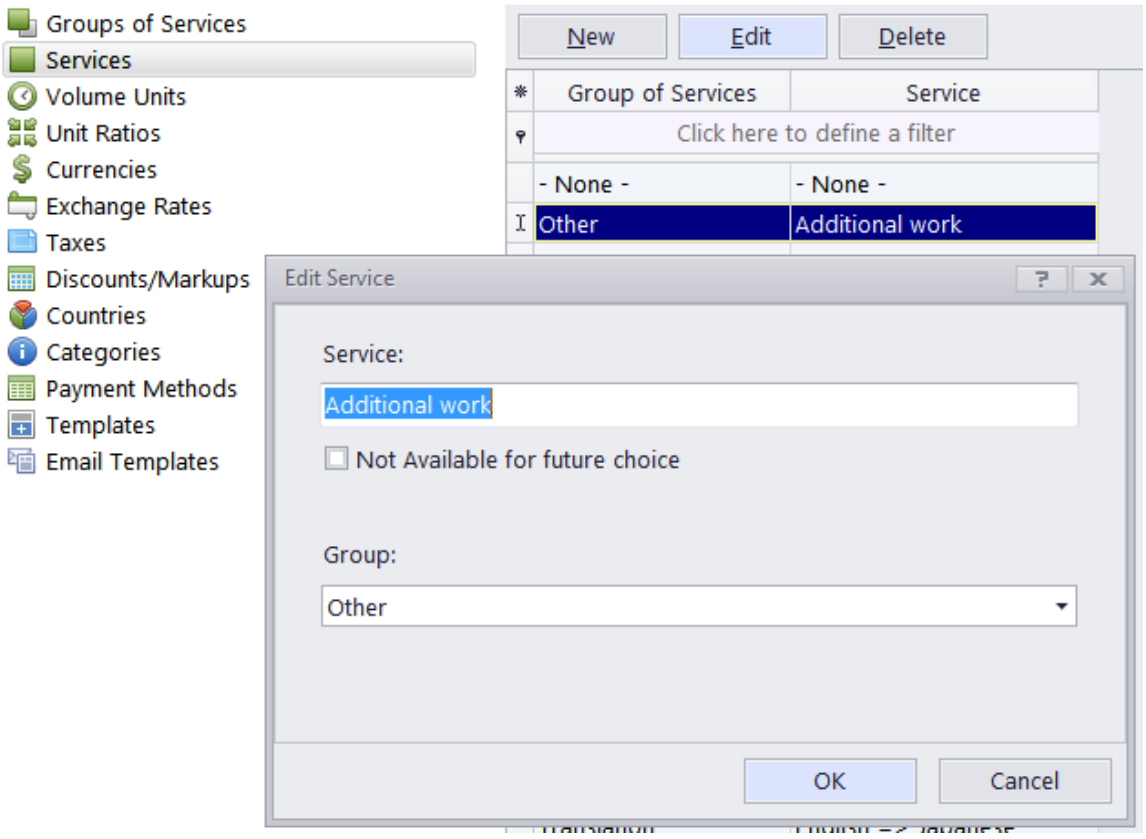
To open the **Services** tab click **Services** in the left part of the Business settings window.

Each s***ervice*** belongs to a ***group of services***.

To add a new ***service*** **c**lick the **New** button, select a group of services and enter the name of the service (50 characters maximum).

Checking **Not Available for future choice** will prevent the Service from appearing in the drop-down lists of the New/Edit Job windows.

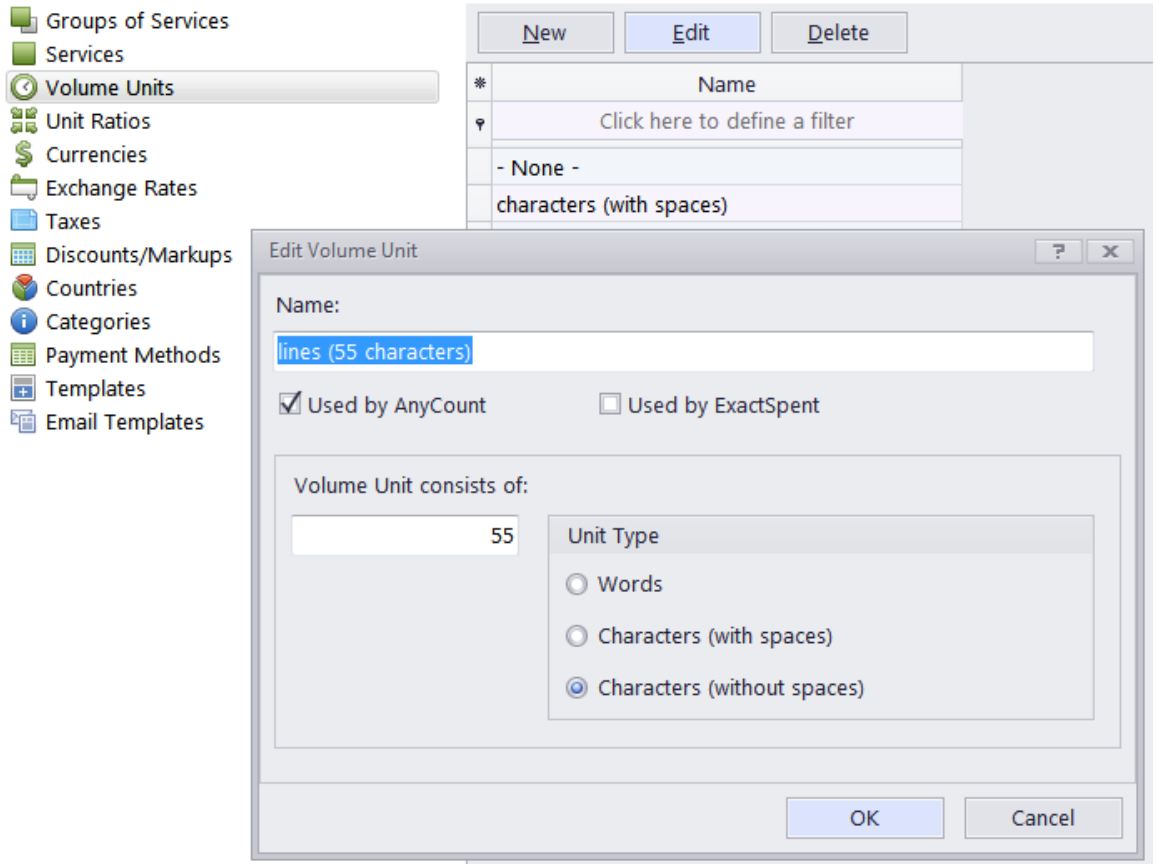
A service cannot be deleted if it is used in any price, quote or a job.



3.2.3. Volume Units

On the **Volume Units** tab of the **Business Settings** window you can create and manage the list of volume units, which you will use for entering job volumes.

To open the **Volume Units** tab, click **Volume Units** in the left part of the Business settings window.



To add a new custom volume unit, click the **New** button, and enter the name of the unit. If the unit you are creating consists of words/characters (with or without space) and you want to use it for text counting with the built-in AnyCount:

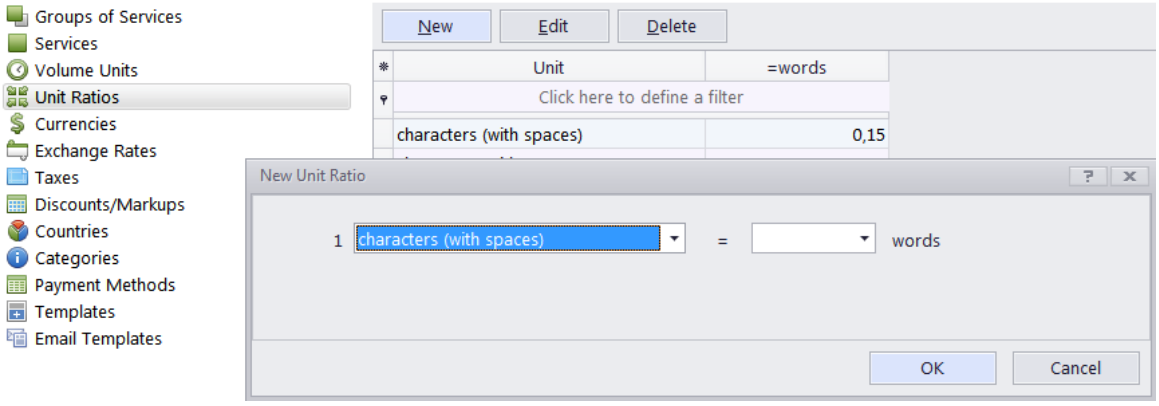
- select the **Used by AnyCount** option;
- specify if it consists of words/characters (with or without spaces) selecting the correspondent option and number of words/characters in the new unit. (For example, volume unit "lines" can consist of 55 characters without spaces).

If the unit does not refer to text volume, e.g. "hours", leave the **Used by AnyCount** option unselected. Instead, you may check the **Used by ExactSpent** box to allow the unit to be used in tandem with the ExactSpent program.

3.2.4. Unit Ratios

On the **Unit Ratios** tab of the **Business Settings** window you can specify how many basic units (words by default) any Volume Unit is equivalent to.

This is used when calculating Job volumes as converted into basic units.



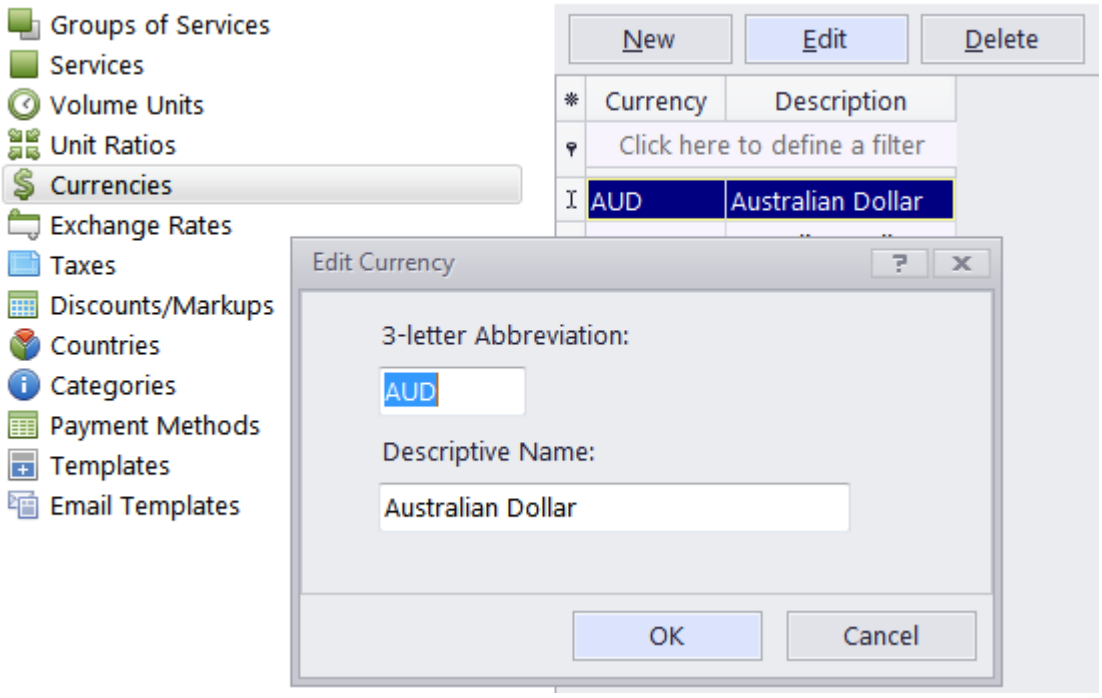
The **New** button opens the **New Unit Ratio** window, which can be used to select a volume unit form a drop-down list and enter how many basic units the unit is equivalent to.

The **Edit** button opens currently highlighted unit ratio for editing.

The **Delete** button deletes currently highlighted unit ratio.

3.2.5. Currencies

On the **Currencies** tab of the **Business Settings window you can** create and manage the list of currencies, which you will be able to use in all TO3000 3D+ financial records. To open the **Currencies** tab click **Currencies** in the left part of the Business settings window.



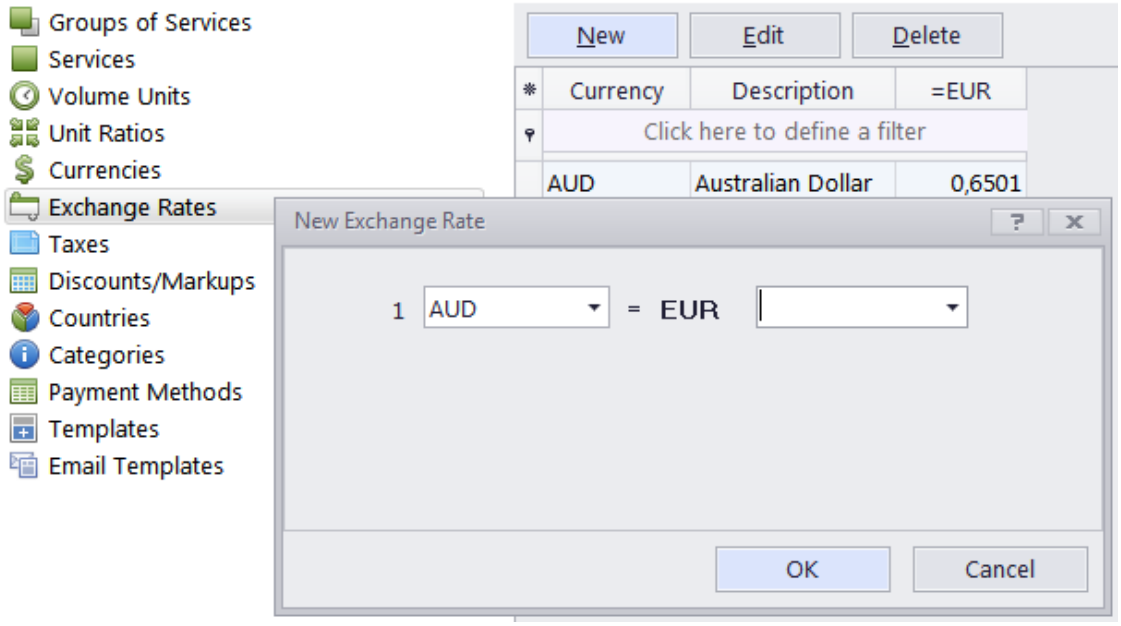
To add a new currency click the **New** button, enter the 3-letter abbreviation for the new currency in the **New Currency** window and the description of the currency (i.e. long name, 50 characters maximum) in the corresponding fields.

3.2.6. Exchange Rates

TO3000 3D+ provides you with the ability to assign a different ***client currency*** to each ***client***, and still be able to see 'the whole picture' using your ***base currency***. (The b***ase currency*** is set in the General section of the **Advanced Settings** window)

On the **Exchange Rates** tab of the **Business Settings** window you can specify the exchange rates between your ***base currency*** and other currencies used.

To open the **Exchange Rates** tab click **Exchange Rates** in the left part of the Business settings window.



To create a new exchange rate record click the **New** button, select the required foreign currency from the drop-down list and specify the rate.

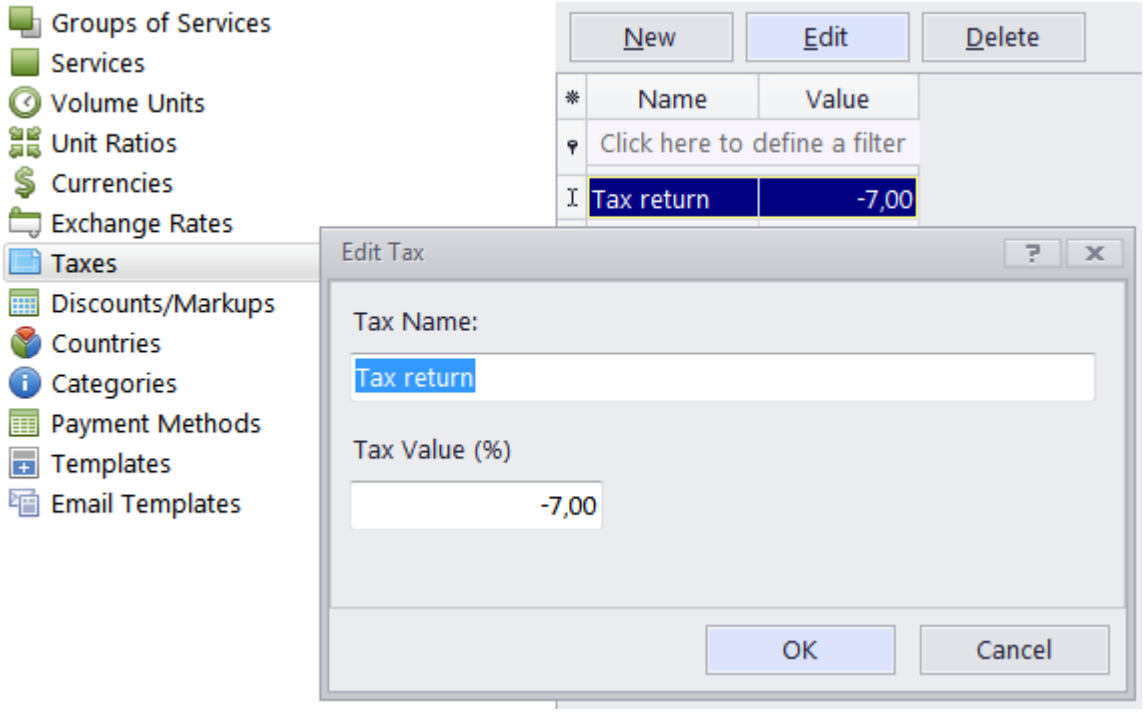
NOTE: The currencies list consists of currencies added on the Currencies tab of the Business settings window.

3.2.7. Taxes

TO3000 3D+ provides you with the ability to automatically consider taxes when issuing invoices.

You can specify tax names and rates on the **Taxes** tab of the **Business Settings** window.

To open the **Taxes** tab click **Taxes** in the left part of the Business settings window.



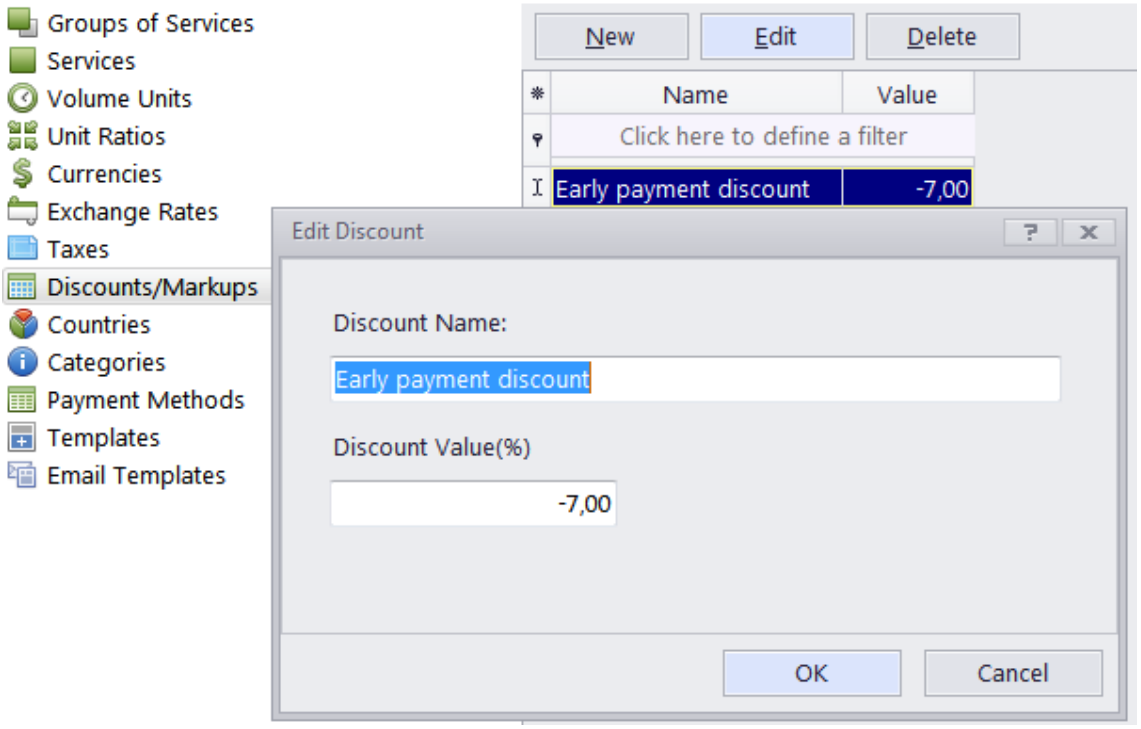
To add a new tax record click the **New** button, and enter the tax name (50 characters maximum) and value (rate) in the appropriate fields. Please note, that tax the rate is entered as a percentage. You can enter negative values to specify tax returns.

3.2.8. Discounts/Markups

TO3000 3D+ provides you with the ability to add and automatically consider discounts and markups when issuing invoices.

You can specify discount/markup names and rates on the **Discounts/Markups** tab of the **Business Settings** window.

To open the **Discounts/Markups** tab click **Discounts/Markups** in the left part of the Business settings window.



Discount rate (value) should be negative; **Markups** are entered/edited in the same **New Discount**/**Edit Discount** window but must have a positive value.

To create a discount or markup, click the **New** button, enter ***Discount/Markup*** name and value (rate) in the appropriate fields. Please note that rate should be entered as a percentage (but without the "%" sign).

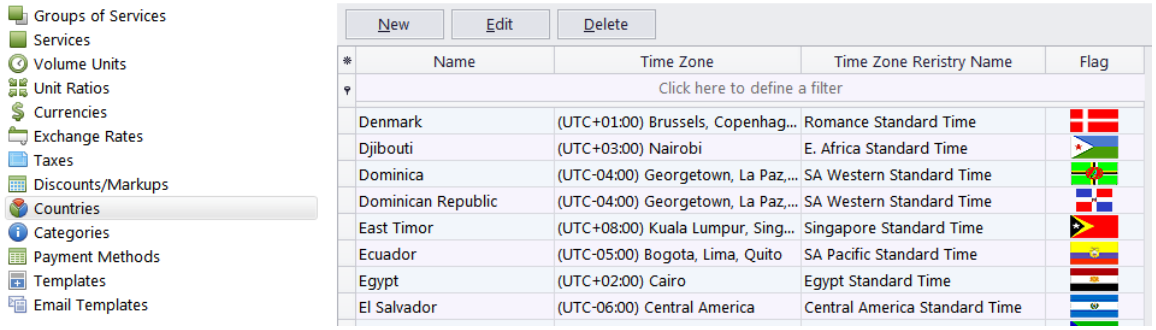
3.2.9. Countries

When creating a new ***client*** record in TO3000 3D+ you can enter the postal address and specify the country by selecting it from the drop-down list. On the **Countries** tab of the **Business Settings** window you can manage the list of countries mentioned above.

NOTE: By default, the TO3000 3D+ database already contains an almost exhaustive list of countries.

To open the **Countries** tab click **Countries** in the left part of the Business settings window.

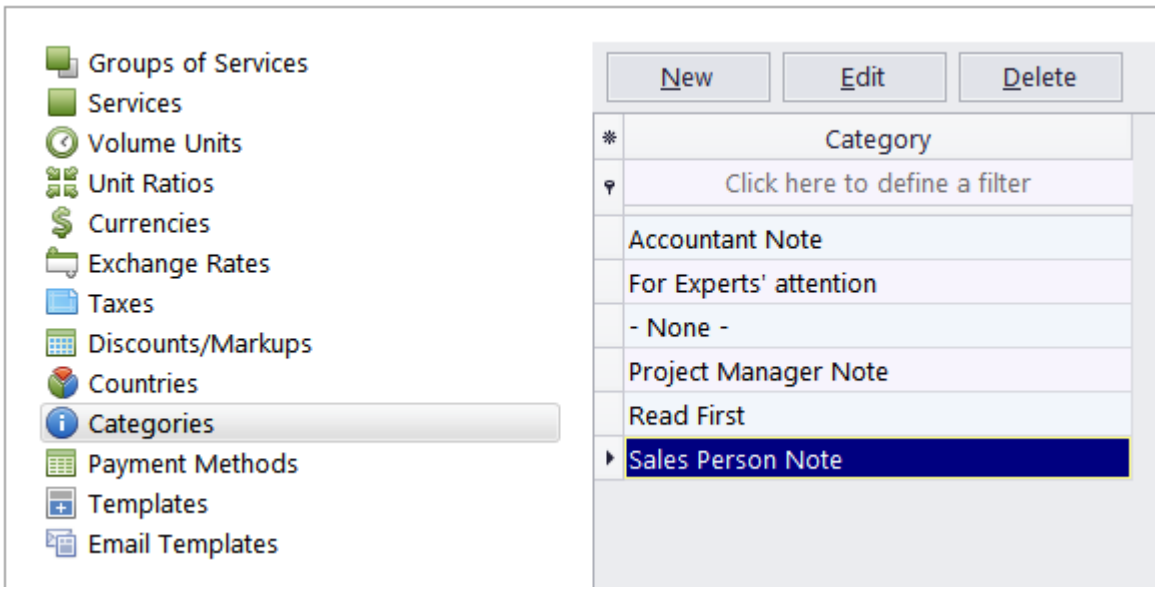
The entries for each country contain it's name, flag (optionally), and time zone.



3.2.10. Categories

Categories settings allow you to add, edit and remove custom types of info notes displayed on the **Info** tabs of the **Client** and **Project** windows.

To open the **Categories** tab click **Categories** in the left part of the Business settings window.



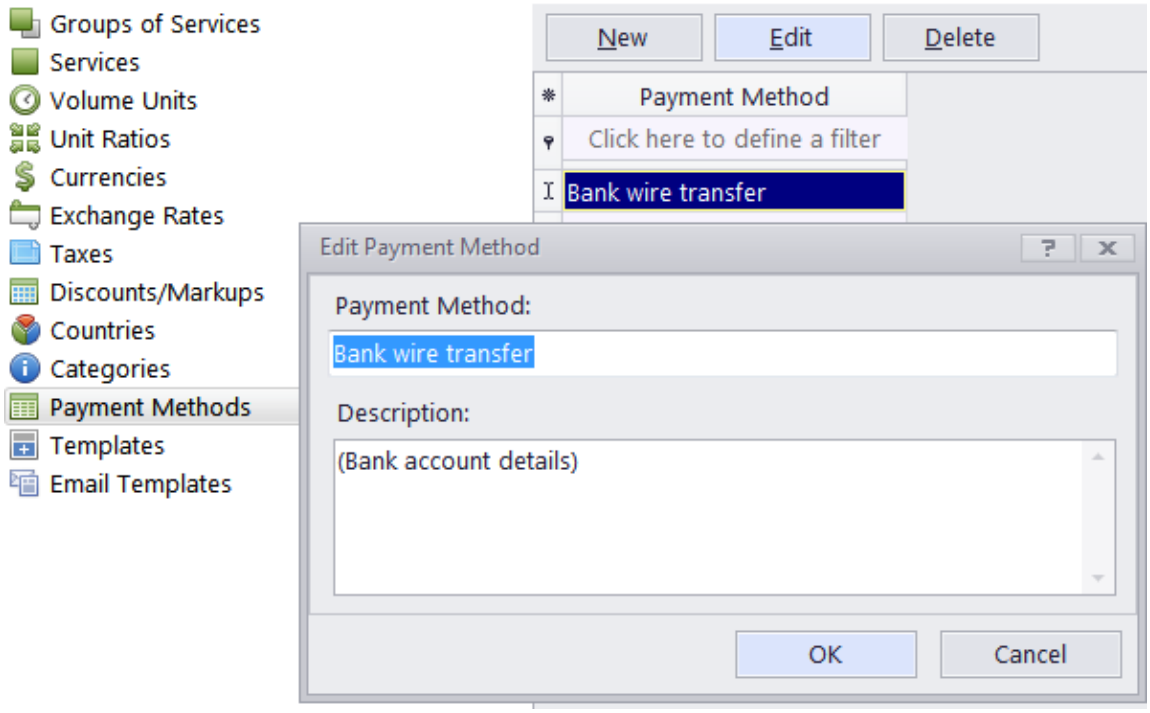
To add a new category click the **New** button, and enter it's name.

3.2.11. Payment Methods

The payment method is one of the many parameters that can be added to an invoice when it is issued with TO3000 3D+. The payment method contains details for performing the payment (bank details, for example).

You can create/edit/delete p**ayment method** records on the **Payment Methods** tab of the **Business Settings** window.

To open the **Payment Methods** tab click **Payment Method** in the left part of the Business settings window.



To add a new payment method click the **New** button, enter the payment method's name (150 characters maximum) and description in the corresponding fields.

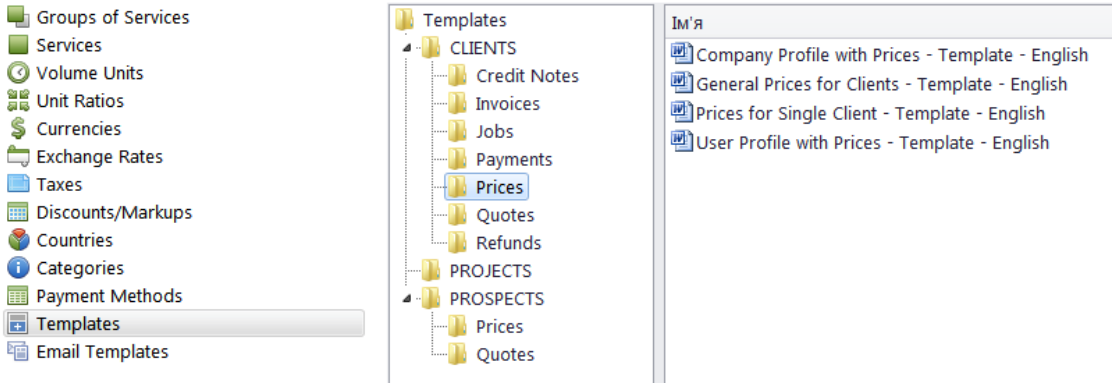
3.2.12. Templates

All documents issued in TO3000 3D+ can be saved in the .rtf format and/or printed/sent via Email using corresponding .rtf templates.

All templates are stored in subfolders of the Templates folder at *C:\Users\Public\Documents\AIT\TO3000, Version 3D\Templates.*

On the **Templates** tab of the **Business settings** you can manage templates and folders inside the Templates folder.

Tree filed displays the structure of template folders. By default, the Templates folder contains three subfolders: CLIENTS, PROSPECTS and PROJECTS. The CLIENTS and PROSPECTS folder contain separate subfolders for each document type.

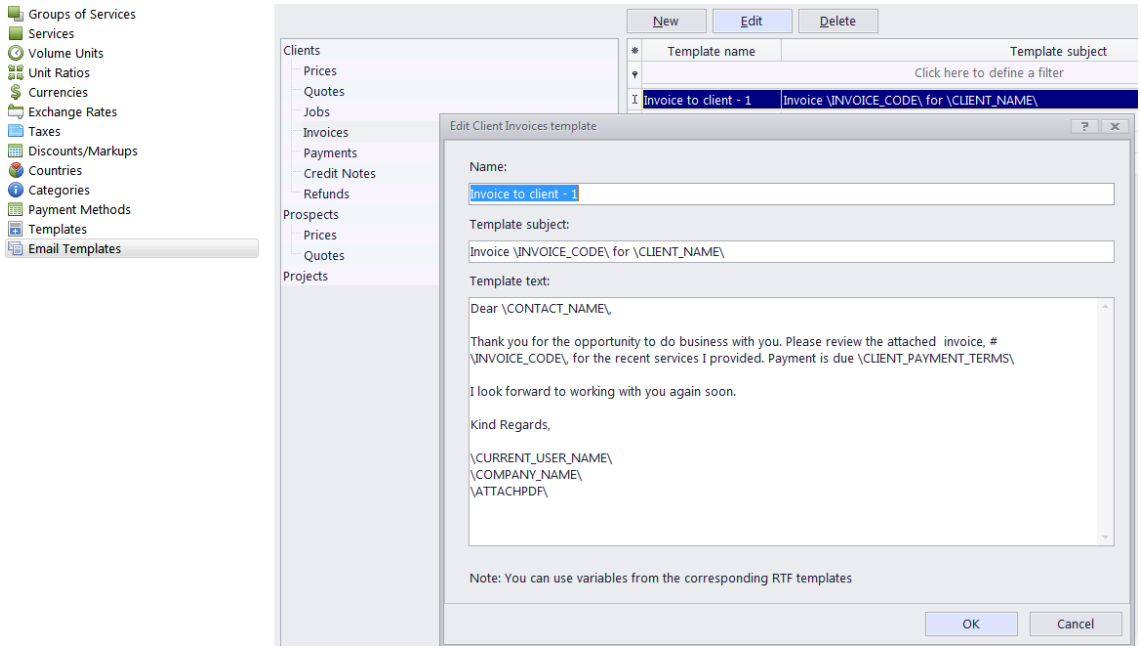


File options

Template files contained in the currently selected folder are displayed in the right field. Double-click a template to edit it. Selecting and right-clicking a file or folder will open the standard Windows context menu for it.

3.2.13. Email templates

Here you can create and edit Email templates - standard messages meant to accompany template based documents when sending them to your clients via the Mail Sender.



The left frame contains the list of RTF template-based documents, and the right frame contain a list of email templates for the currently selected type.

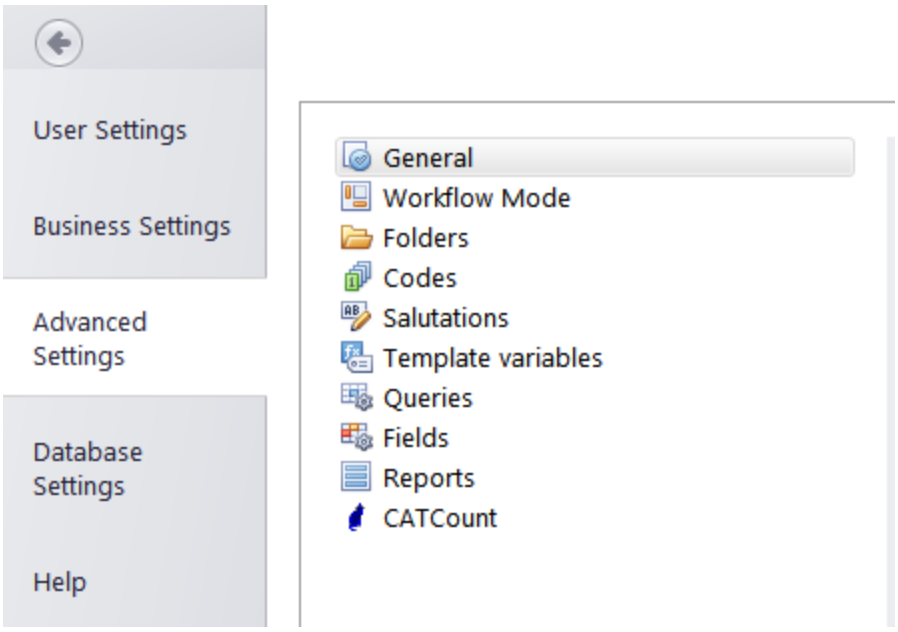
Use the **New, Edit** and **Delete** buttons to manage the email templates.

When editing E-mail Templates, you can add the same variables that are used in the corresponding RTF templates both to the subject line and the body of the e-mail. See below for a list for links to topics covering all variables.

3.3. Advanced settings

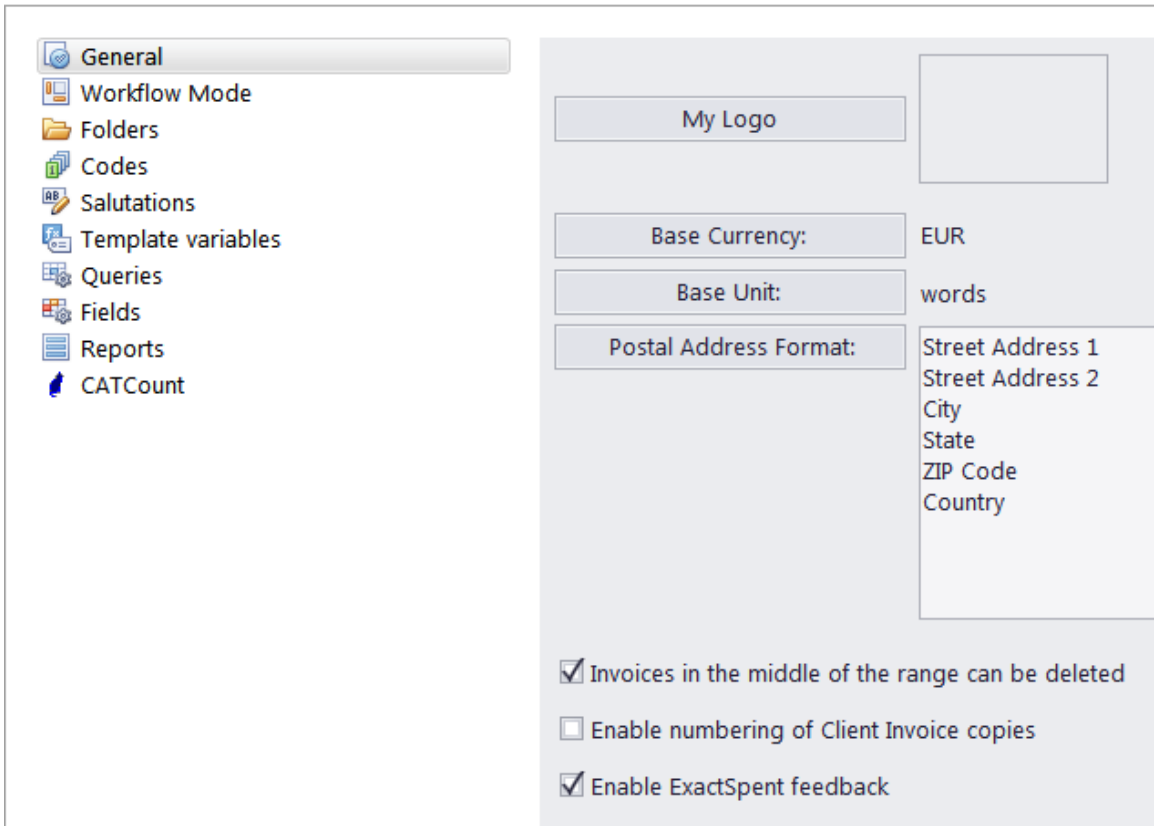
Advanced settings can be used to manage the more complex aspects of TO3000 3D+, like global *codes*, folder settings, *database customization* and *custom report* building.

To access **Advanced Settings** enter the Backstage view and click the **Advanced Settings option**.


User Settings
Business Settings
Advanced Settings
Database Settings
Help
General
Workflow Mode
Folders
Codes
Salutations
Template variables
Queries
Fields
Reports
CATCount

3.3.1. General

This tab of the Advanced Settings includes a set of general options for TO3000 3D+:



Changing your logo

You can load you personal logo into TO 3000 by clicking the **My logo** button and choosing **Paste** or **Load**. A miniature version of it will appear on the **Backstage** button.

Changing the base currency

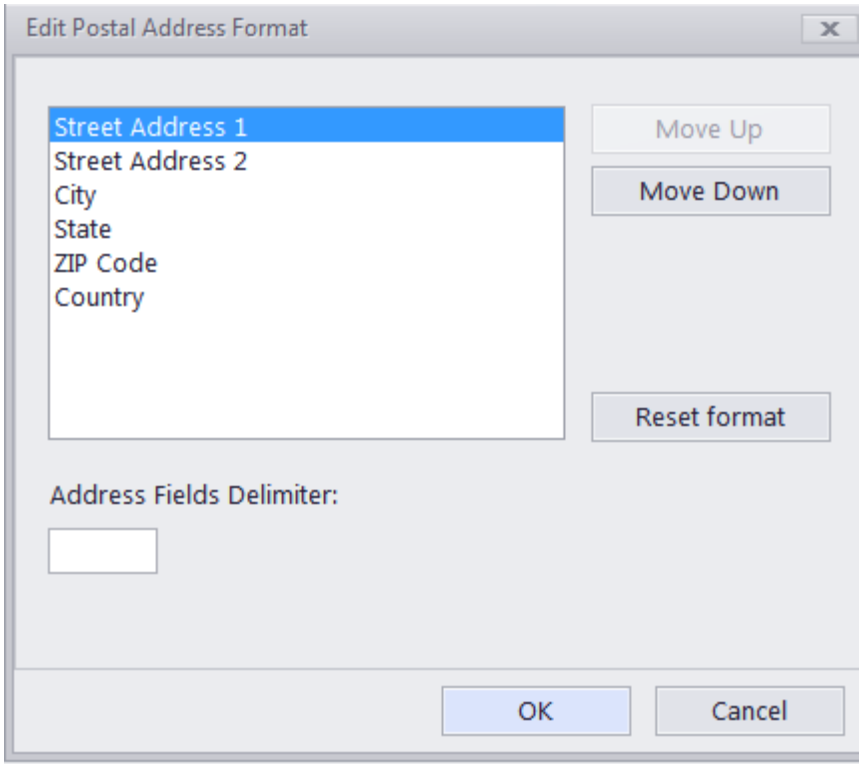
To set your **Base Currency**, click the **Base Currency:** button. The list of currencies available for selection can be configured with the help of Currencies section of Business settings. After switching to a different currency, you will immediately be prompted to define it's exchange rates to all other currencies.

Changing the base unit

To set the Base unit for your database, click the Base Unit button and select a unit from the drop-down list. After switching to a different unit, you will immediately be prompted to define it's ratios to all other units.

Postal address format

Click the **Postal Address Format:** button to change the order in which elements of the postal address appear in printable documents. This will affect data displayed by the \CLIENT_ADDRESS\ variable



Use the **Move Up** and **Move Down** buttons to change order of postal address elements. If you need to separate postal address elements using some special character (e.g. a comma), you can type this delimiter in the **Address Fields Delimiter** field.

Additional options

By default you cannot delete an invoice if the invoice with a larger code has been already issued (however in this case the invoice can still be voided). To enable deletion of invoices in the middle of the invoice range, select the checkbox **Invoices in the middle of the range can be deleted**.

You can add a field specifying the invoice copy number by selecting the **Enable numbering of Client Invoice copies** checkbox. This will enable the **Number of copies** field in the **Edit Invoice** window. Number specified in that field can be added to printed invoices with the help of the \INVOICE_COPY\ variable.

If you have ExactSpent installed, the **Enable ExactSpent feedback** option will allow you to set the degree of integration with ExactSpent. If enabled TO3000 will both send Job data to ExactSpent and receive it. If disabled TO3000 will send Job data, but not receive any feedback.

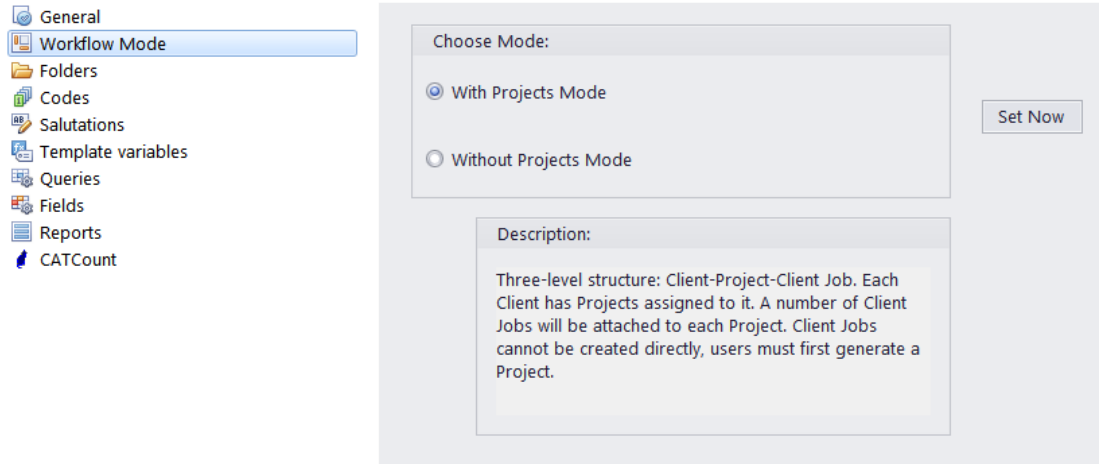
3.3.2. Workflow Modes

The Workflow Modes menu is used to choose the workflow mode used in TO3000 3D+. There are two modes available:

•**With Projects Mode.** This workflow mode allows to group jobs in a project.

•**Without Projects Mode.** This workflow mode allows to work with jobs without creating a project.

Select the mode you want to use and click **Set Now.**

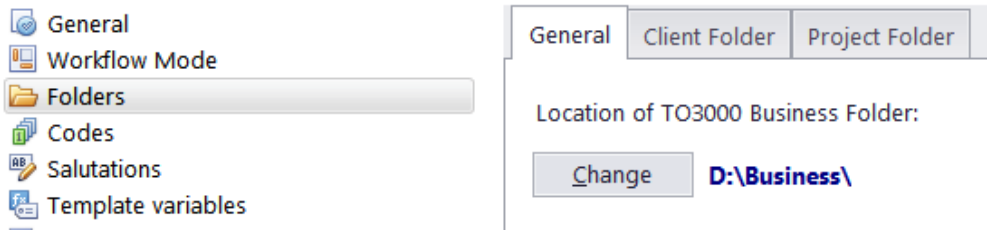


3.3.3. Folders

The location of *Business folder* as well as automatic folder creation options can be changed via the **Folders** section of the **Advanced Settings** window.

To change the location of Business folder:

1. Go to **Backstage > Advanced Settings**.
2. Click the **Folders** section.
3. Click the **Change** button.

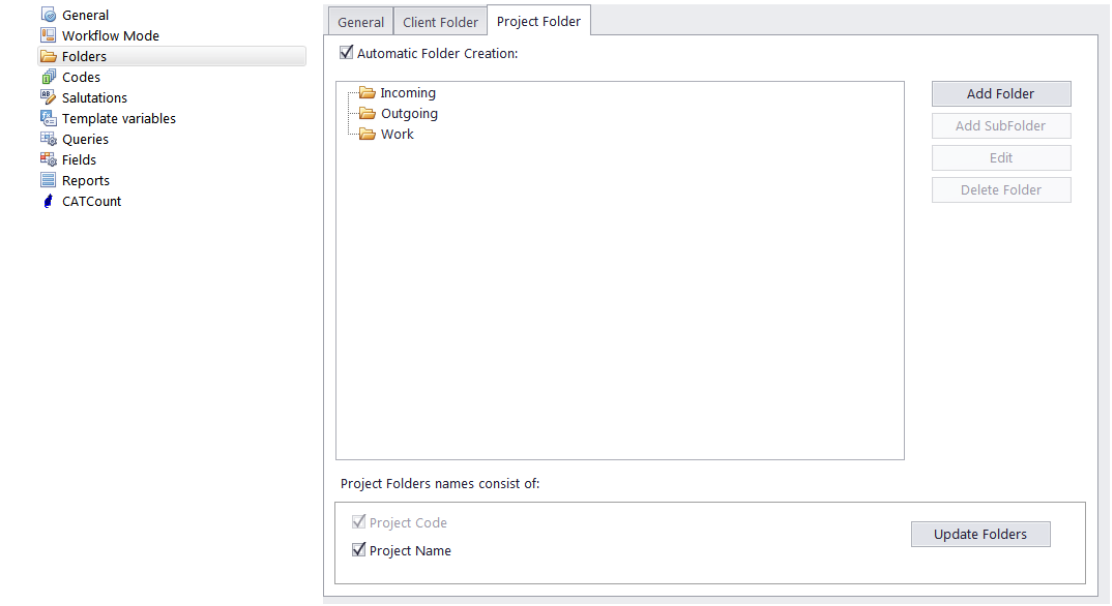


Additional folder settings

To add custom subfolders to Client or Project folders, open the respective tab (**Client Folder**, **Project Folder** (*With Projects Mode* only) or **Client Job Folder** (*Without Projects Mode* only), and create the required folders there. Any folders added to the folder structure this way will be automatically added to each new Client or Project folder.

To disable the automatic creation of **Client** or **Project** folders, clear **Automatic Folder Creation** check boxes on the **Client Folder** or **Project Folder** tab.

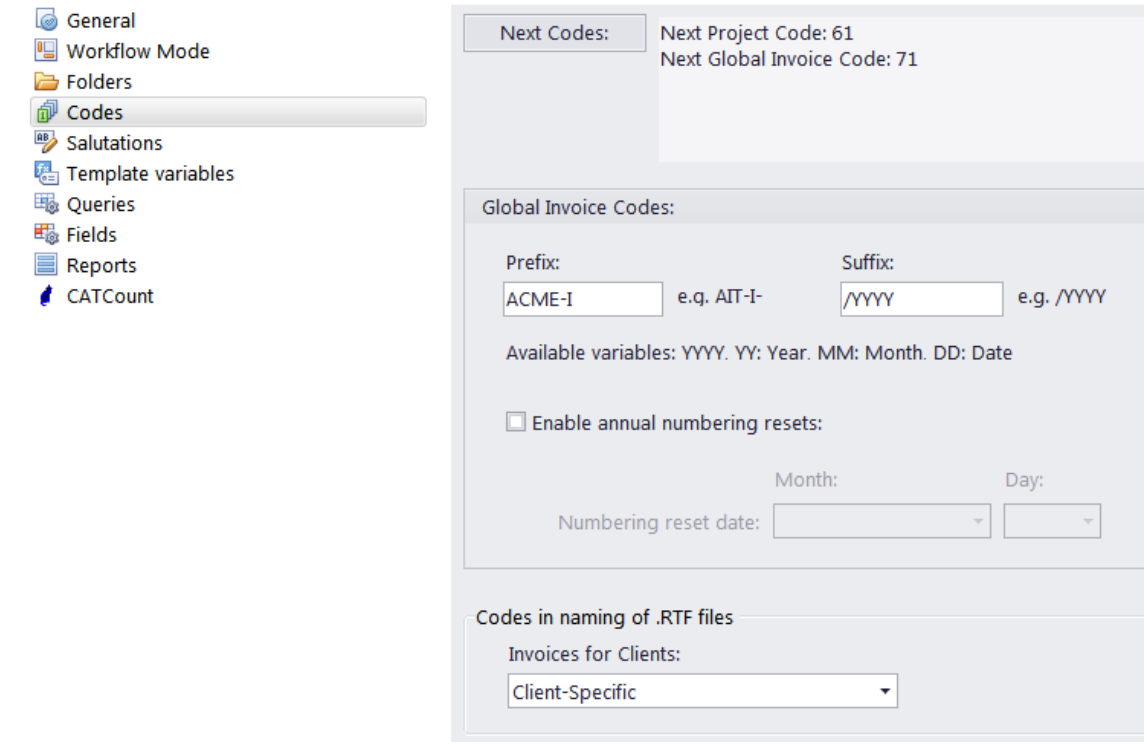
NOTE: This will only affect the folders created after the change. Existing folders will not be altered.



The **Project** folder tab has an additional option - set whether Project names are included in the names of individual project folders. Click **Update Folders** to immediately rename all existing project folders.

3.3.4. Codes

In TO3000 3D+ "global" codes are used to identify *projects*, *clients*, and *invoices*. These codes are generated automatically each time a new project, client or invoice is created, and cannot be edited by users.



Setting Next Codes

Click the **Next Codes** button to forcefully set the next **Global Code** which will be assigned to the next **Project** created and the next **Invoice** issued.

NOTE: The next code cannot be less than the last code of this type in the database. Thus if you already have a project with code 010, the next project code cannot be set 10 or less (even if some projects were deleted).

Editing Global Invoice Code display format

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

To add a prefix or suffix to invoice codes, type it into the Prefix or Suffix fields directly. If you wish to add a date or year as a prefix, use the common Windows date codes to specify the format in which the date must be added to the global invoice code:

Example:

YYYY - will display a four digit year, while YY will display two digit year;

MM - will display the month number;

DD - will add the date to the template.

Regulations in some countries may require resetting invoice counters each year. TO3000 3D+ can be configured to start invoice counting anew each year, starting with the first invoice issued in a new year. Select the **Enable annual numbering resets** checkbox to enable annual invoice code resets and adjust the reset date if needed.

NOTE: After **Enable annual numbering resets** is selected, these resets cannot be rolled back.

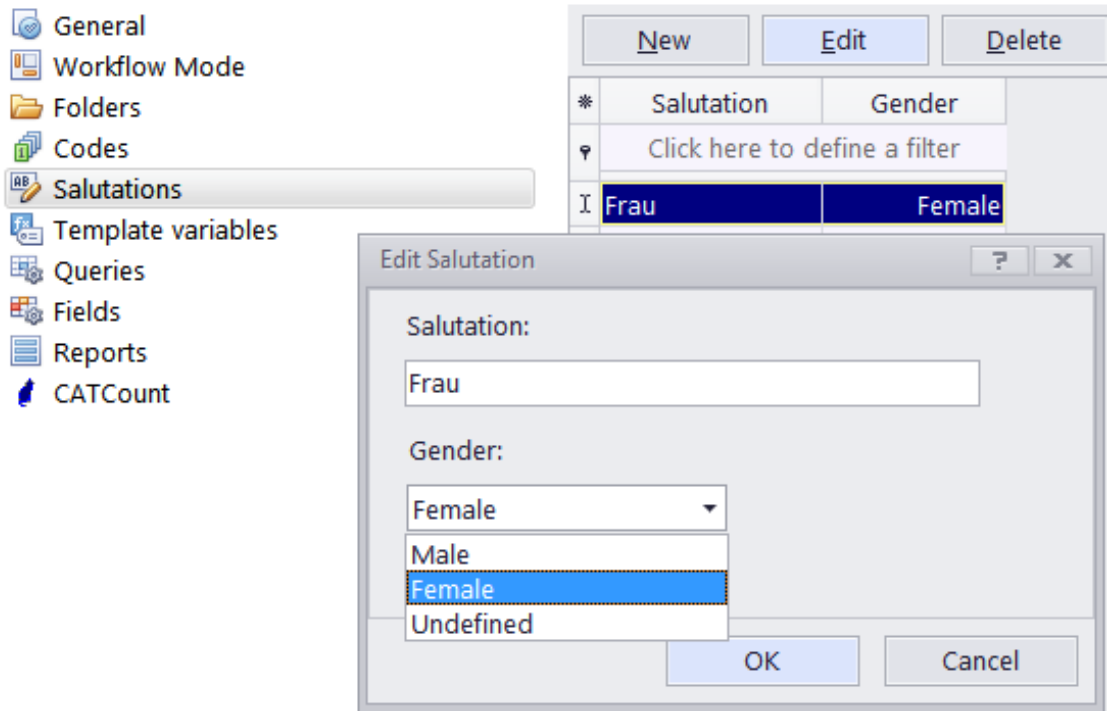
Codes in naming RTF files

Codes in naming of .RTF files options determine what code will be used when automatically generating names for invoice files, saved by TO3000 3D+ in your Business folder. Either the Client–Specific or Global code can be used.

3.3.5. Salutations

Salutations will be automatically added to contact names in your invoices. Use the **Salutations** section of the Advanced settings window to add new salutations or modify existing ones.

Salutations are assigned to contacts on the **Contacts** tab of the **Client** window. See Creating contacts topic for details.



To edit salutations:

1. Go to **Backstage > Advanced Settings**.

2. Click the **Salutations** section and click New, or select a salutation and click Edit..

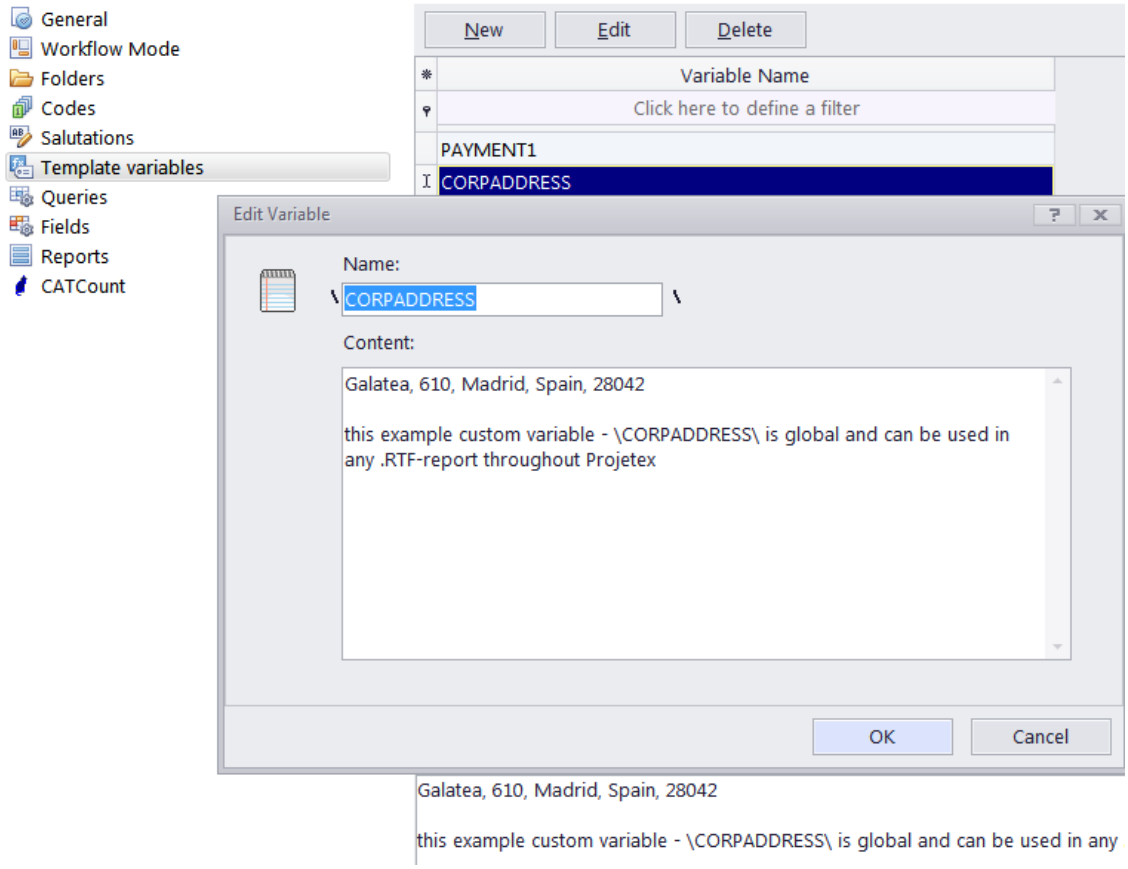
3. Enter the salutation and select the associated gender (Male, Female or Undefined), then click OK.

3.3.6. Template Varaiables

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

➡ **Example:**

If you enter EMAIL as the name of q variable and info@marsonlymars.com as the content, you will be able to use the \EMAIL\ variable inside all your .rtf templates. When a document is generated from a template, all variable names will be replaced with their contents.



To edit custom variables:

1. Go to **Backstage > Advanced Settings**.

2. Click the **Custom Variables** section.

Variable contents can be edited either in the Edit Variable window, or directly under the variables list, where the contents of the selected variable are displayed,

3.3.7. Queries

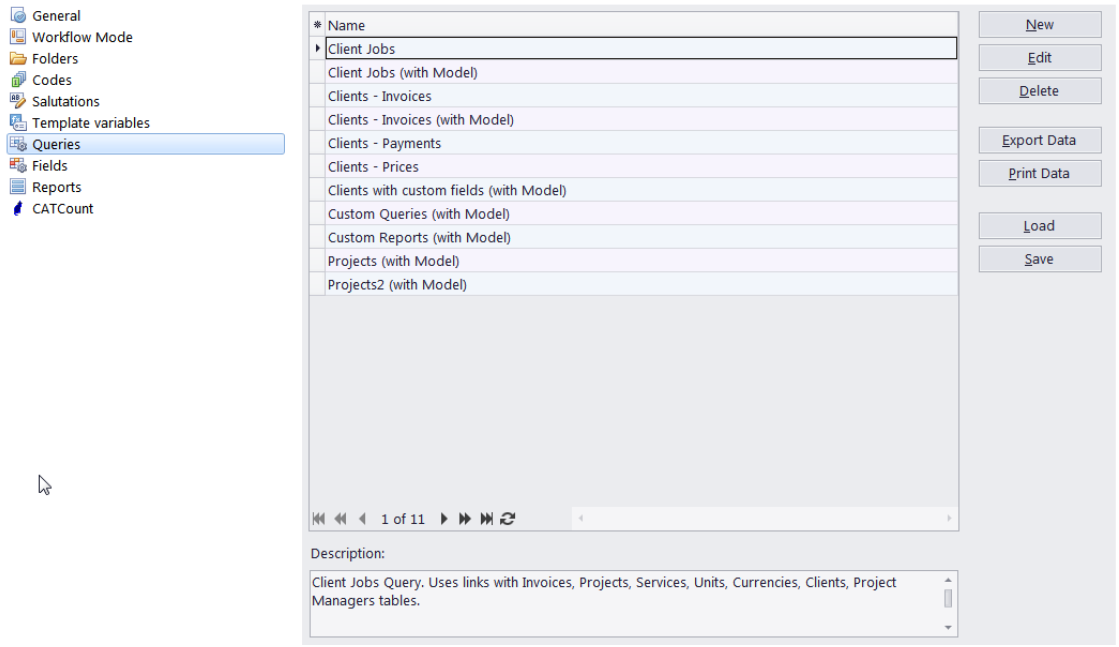
SQL-versed users can extract any data directly from the TO3000 3D+ database with the help of custom queries. Information extracted with the help of queries can be exported in common file formats like XLS, CSV, HTML, PDF.

To access custom queries:

1. Go to **Backstage > Advanced Settings**.

2. Click the **Queries** section.

The Queries section displays the list of available queries. Double–click any of the queries in the list to open this query in the **Query Builder** window for editing.



Exporting and printing query results

To *export* the data gathered by a certain query, select this query and click **Export Data** button. This will run the currently selected query and prompt you to select the format of the output file.

To *print* the resulting data of a query, select it and click the **Print Data** button. This will open the **Print Preview** window. Click the **Print** button to send the query results to chosen printer.

Loading and saving queries

Queries can be saved to and loaded from special .px15 files.

To save a query in a .px15 file, select it and click the **Save** button. Enter name of the file and click **Save** button.

To load a query from a .px15 file, click the **Load** button and use the **Open TO3000 3D+ Query** window to locate the required px15 file.

3.3.8. Fields

TO3000 3D+ supports database structure customization in the form of adding custom fields to certain tables in the database. Custom fields can be added via the **Fields** section of the **Advanced Settings** window.

NOTE: You can create custom groups of fields as well and variables for using custom fields value in your .rtf templates!

To edit custom fields:

1. Go to **Backstage > Advanced Settings**.

2. Click the **Fields** section.

The following windows contain **Custom fields** tabs:

1. *Clients*:

- **The Main** tab of the **Client/Prospect** window (Next to Client/Prospect profile)
- **Quotes to Clients/Prospects** (New/Edit quote window)
- **Client/Prospect Jobs** (New/Edit job window)
- **Invoices to Clients/Prospects** (New/Edit invoice window)
- **Business Expenses** (New/Edit expense window)

2. **The Main** tab of the **Project** window (Next to Project profile)

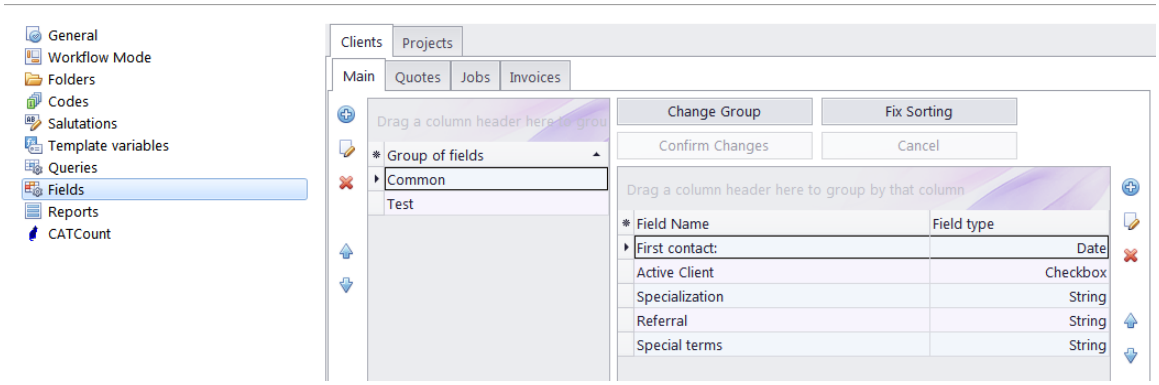
Creating groups of custom fields

1. Select the table to which a new custom field must be added by selecting the corresponding tab.
2. Click the **New** button from the left-hand column of buttons.
3. Specify the name for new **Group of fields** in the **New Custom Group of fields** window.
4. Click **OK** to save changes or click **Cancel** to discard.

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

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

To change the order of the **Group of fields**, i.e. the order of tabs within the **Custom Fields tab**, use **Move Up**/**Move Down** buttons.



Creating custom fields

1. Select the necessary **Group of fields** (if you have created more than one).
2. Click the **New** button from the right-hand column of buttons:
3. Fill the fields of the **New Custom Field** window:

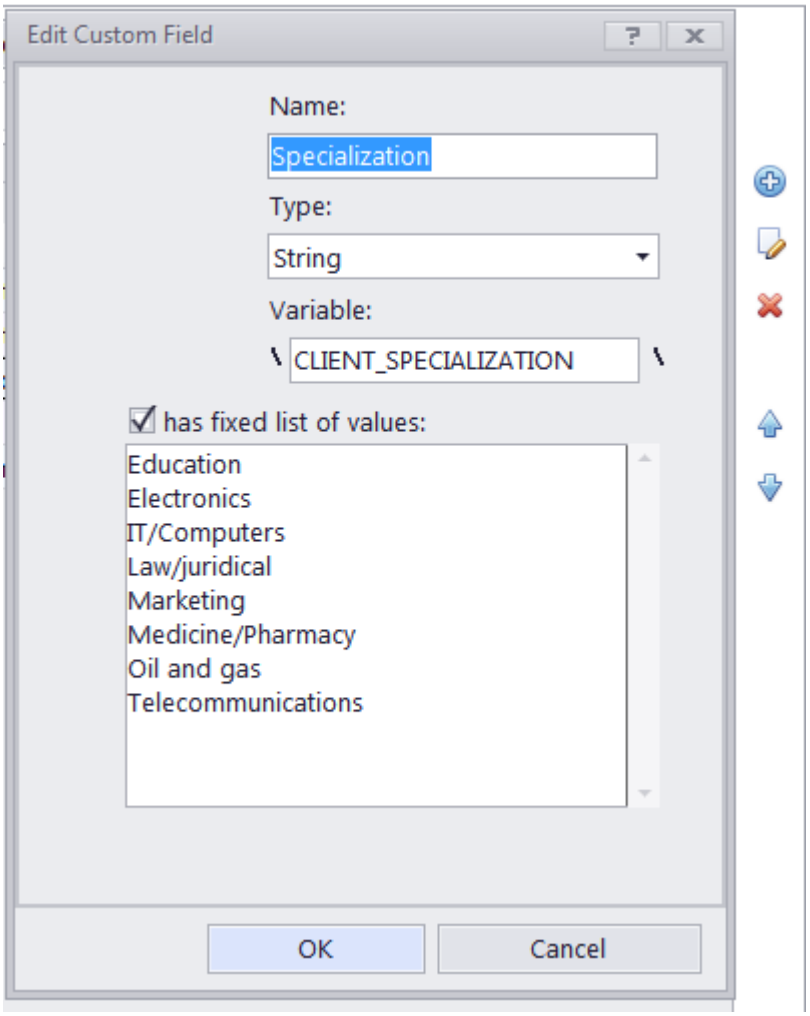
•Enter the name of the new **Custom Field** in the **Name** text box.

•Select the data type of the new **Custom Field** from the **Type** drop–down list.

NOTE: To create a drop-down list, select the String data type, check the "Has fixed set of values" check box and enter all the possible values.

•(optional) Enter the name for the variable that will possess the value of the new **Custom Field**; you will be able to use this variable in the .RTF templates. See also: Templates

•Click **OK** to add the specified **Custom Field** or click **Cancel** to discard.



To move a **Custom Field** to another **Group of fields**, i.e. another tab, click the **Change Group** button, and select the target group in the window that opens.

To confirm all changes you have made, click the **Confirm Changes** button.

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

The new custom fields appear on the **Custom Fields** tab of the respective TO3000 3D+ windows.

3.3.9. Reports

Custom reports can be created edited and deleted from the **Advanced settings** window.

To manage custom reports:

1. Go to **Backstage > Advanced Settings**;

2. Click the **Reports** section to open *custom report* management options.

Custom report options

The following options are available for custom reports:

- The **New\Edit\Delete** buttons can be used to create\modify\delete the selected report.
- The **Edit Details** button provides access to the **Edit Custom Report** window where you can change the report's name and description. The names of **fixed reports** (bundled with the program) can not be changed
- The **Preview** button opens the **Preview** window where you can see how the selected report would look on paper and print it if needed.
- The **Load** and **Save** buttons will allow you to download new reports from .PX15 report files (*importing*) and save the existing reports to .PX15 files for (*exporting)*.

NOTE: Custom reports which are displayed in **Custom Reports** section of TO3000 3D+ **Advanced settings** window, are the ones currently integrated into TO3000 3D+ database. *PX15* files are used solely for export-import purposes, thus deleting a *PX15* file from *C:\Users\Public\Documents\AIT\TO3000, Version 3D\Reports* will not delete any of the reports in database.

NOTE: The Compatibility column displays which versions of TO300 the selected report is compatible with. This allows you to quickly see if you need to update your custom reports after upgrading the program to the newest version.

Exporting a custom report

To *export a custom report*, save the required report in a .PX15 file. This file can later be imported into another TO3000 3D+ database.

1. Select the required ***custom report*** in the list.

2. Click the **Save** button.

3. Specify the name and location for *PX15* file being saved.

Importing a custom report

You can import a custom report to your database from a *PX15* file.

To *import a custom report*, use a *PX15* file to load required report.

1. Save the *PX15* file being imported to the *C:\Users\Public\Documents\AIT\TO3000, Version 3D\Reports* folder.

2. Click the **Load** button.

3. Locate the *PX15* file being imported, select it and click the **Open** button.

Editing a custom report

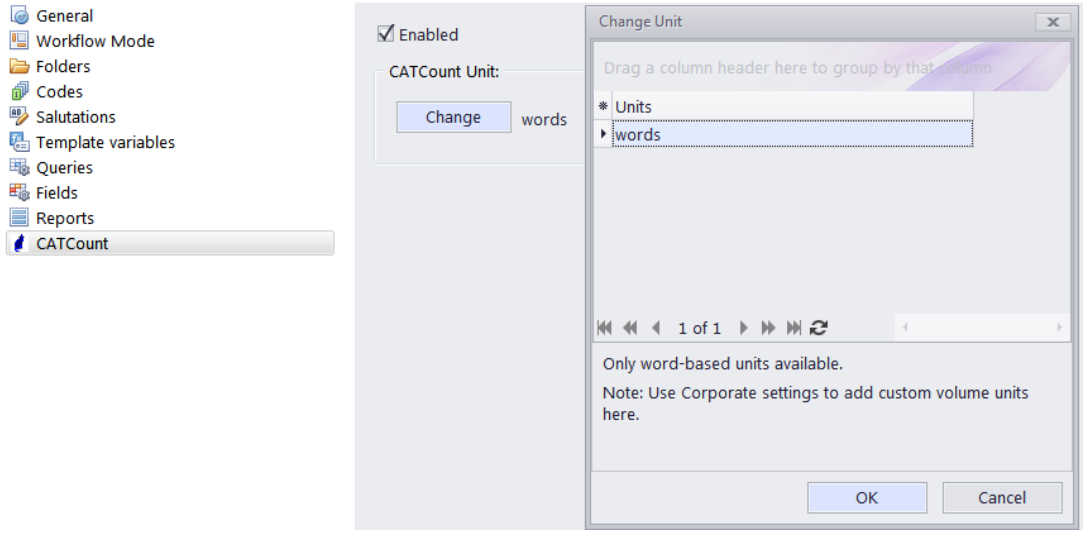
To make changes to a custom report, select this report in the list and click the **Edit** button. This button opens the **FastReport** window (report designer interface).

The FastReport designer is a complex tool intended for IT specialists. It requires some basic *SQL* and *Delphi* knowledge. A step-by-step creation of simpler reports is described in the Example: creating a report topic.

For detailed information, please visit the Fast Report Inc. Internet site: http://www.fast-report.com

3.3.10. CATCount

This area contains settings for the CATCount tool, used to calculate volumes of computer-assisted translation.



Select the **Enabled** check box to enable **CATCount** in TO3000.

Click the **Change** button and select the word-count units in which CATCount must provide its counts. CATCount supports only word-based units.

When this feature is enabled, the **CATCount** button appears in **New Client Job (Edit Client Job)** and **New/Edit Client Quote**, windows.

Note: Units displayed in this list can be edited in the **Volume Units** area of the **Business Settings** tab in the **Backstage** view.

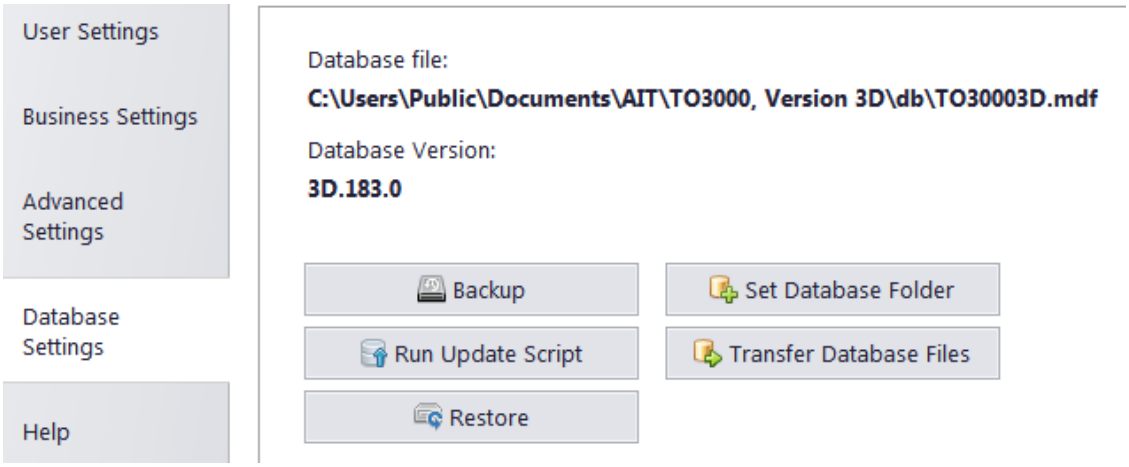
3.4. Database settings

Database settings window is used to perform maintenance operations over TO3000 3D+ database.

TO3000 Database string displays full path to TO3000 3D+ database file, which is normally located at *C:\Users\Public\Documents\AIT\TO3000, Version 3D\db\TO30003D.ndf*

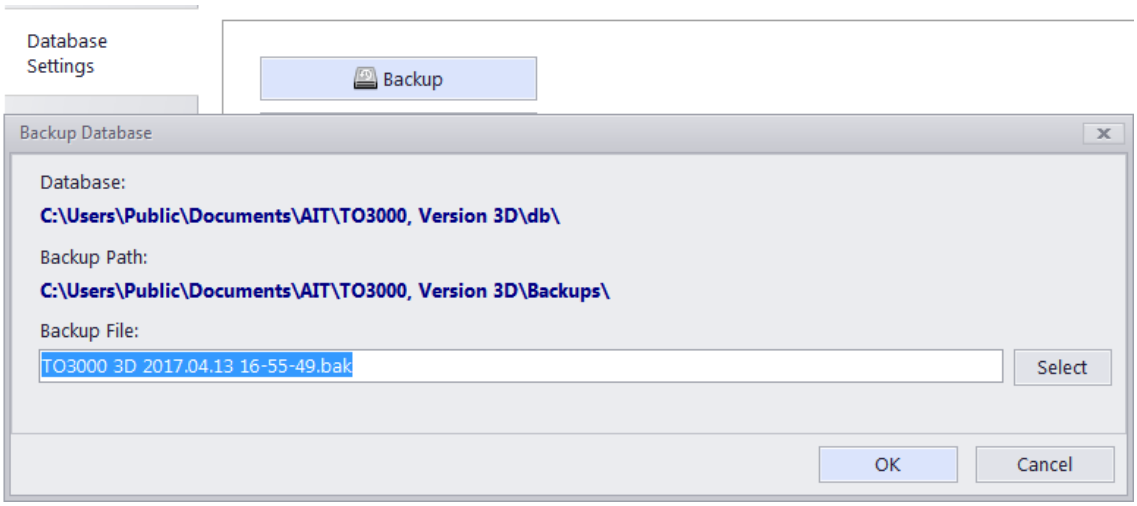
Database Version string displays the version of TO3000 3D+ database. Version number consists of program version (9.70.0) and major/minor version of database. Use this string for reference when manually updating database version with the help of database update scripts.

The Database settings window is used to perform maintenance operations on the TO3000 3D+ database.



3.4.1. Backup

It is recommended to perform regular backups of the TO3000 3D+ database. You can perform a backup of the database at any time by clicking the **Backup** button on the **Database Settings** window of TO3000 3D+.



To perform a *backup* operation:

1. Go to **Backstage > Database Settings,** and click the **Backup** button;
2. Specify the location of the backup file by clicking **Select** button;
3. Enter backup file name in the **Backup File** field;
4. Click **OK** button to begin backup operation.

3.4.2. Run Update Script

In some cases, when you update your TO3000 3D+, the database needs to be updated as well. Usually the database version is automatically updated while updating TO3000 3D+, however there may be exceptions. In this case the database can still be updated manually by running a *database update script*.

Update scripts are always installed together with TO3000 3D+ and can be found in the \AIT\Translation Office 3000 Version 3D\Admin\DBUpdates folder in the form of *.PTU* files.

To *update the database* using a database update script:

1. Go to **Backstage > Database Settings**;
2. Click the **Run Update Script** button from the **Database Settings** window.

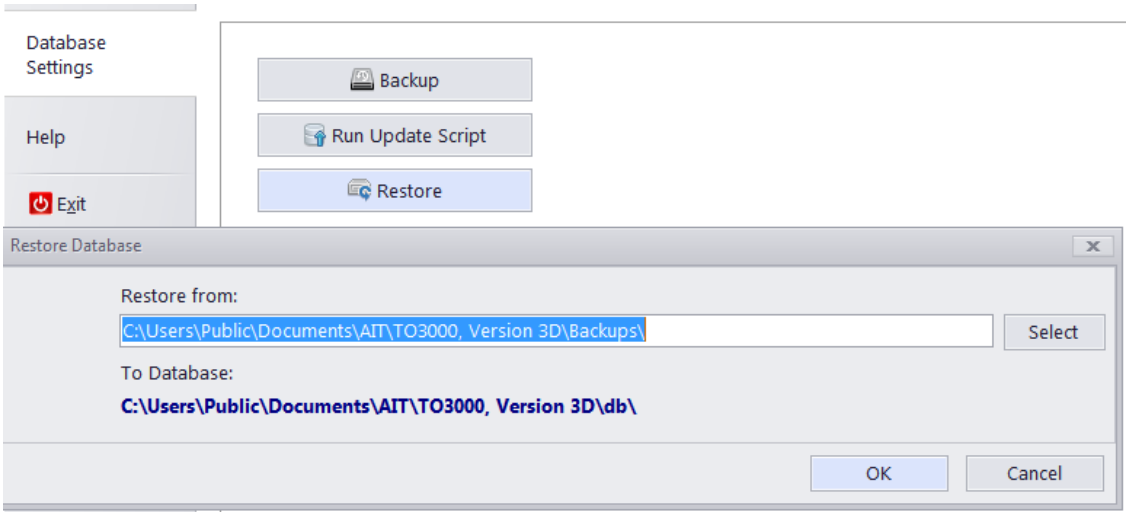
3. Locate the script which updates your current database version to next version and select it. Repeat update operation until you have most current database version.

➡ **Example:** The installed database version is 10.59.0 and the software update requires the 10.61.0 database version. In this case you need to consecutively run two updates (first *dbx59to60.ptu* and then *dbx60to61.ptu*).

NOTE: TO3000 3D+ performs a mandatory backup before each database update operation, for maximum security of data in case anything goes wrong during the update.

3.4.3. Restore

The Restore command is performed to restore the database which you have saved in a backup file created earlier (by running the **Backup** command).



To *restore your database* from a backup file:

1. Click **Database Settings** in the **Backstage** view;

2. Click the **Restore** button on the **Database Settings** window of TO3000 3D+.

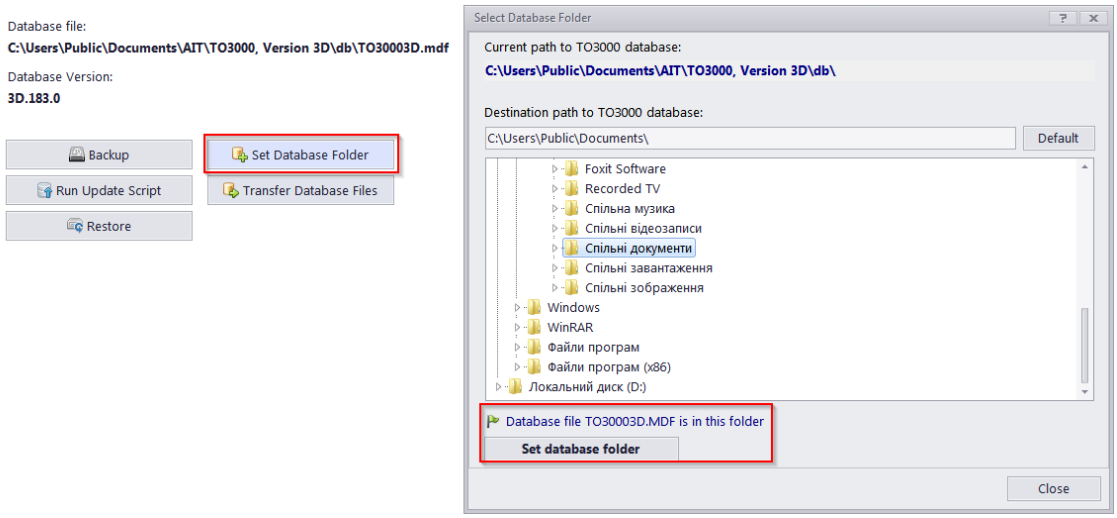
3. Click the Select button in the Restore Database dialog and locate required backup .BAK file (by default these files are stored in *C:\Users\Public\Documents\AIT\TO3000, Version 3D\Backups*) and click OK to begin the restore operation.

NOTE: It is good practice to backup a database or copy it to another location before running the **Restore** function.

3.4.4. Set Database Folder

The **Set Database Folder** command is used to switch to a different location with the database files.

It can be used to, for example connect to a database that is synchronised with cloud storage, or to switch between multiple databases on the same machine.



To point the program to a different database location:

1. Click **Database Settings** in the **Backstage** view;

2. Click the **Set Database Folder** button on the **Database Settings** window of TO3000 3D+.

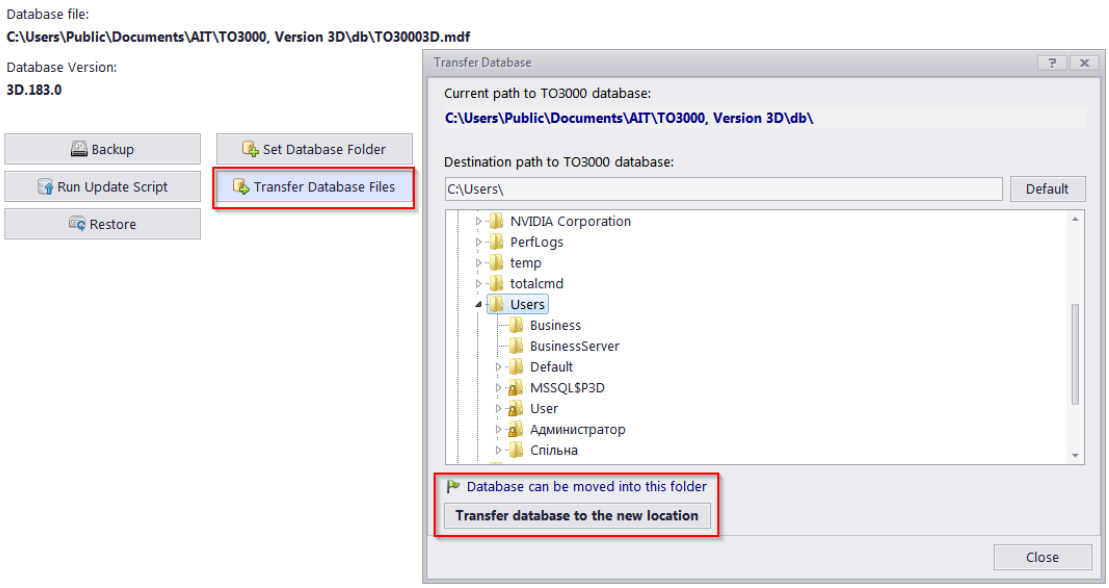
3. Navigate the folder tree to the location of the database and click the **Set Database Folder** button under it.

The window will inform you if the currently selected folder contains the required files. Click the **Default** button to return to the default database location.

3.4.5. Transfer Database Files

The **Transfer Database Files** command is used to move the database to a different location on your machine.

It can be used to, for example, put the database in a cloud-synced folder, so you could access it from multiple machines by installing TO3000 there and using the Set Database Folder command to point it to the cloud folder.



To *move your database to a different location:*

1. Click **Database Settings** in the **Backstage** view;

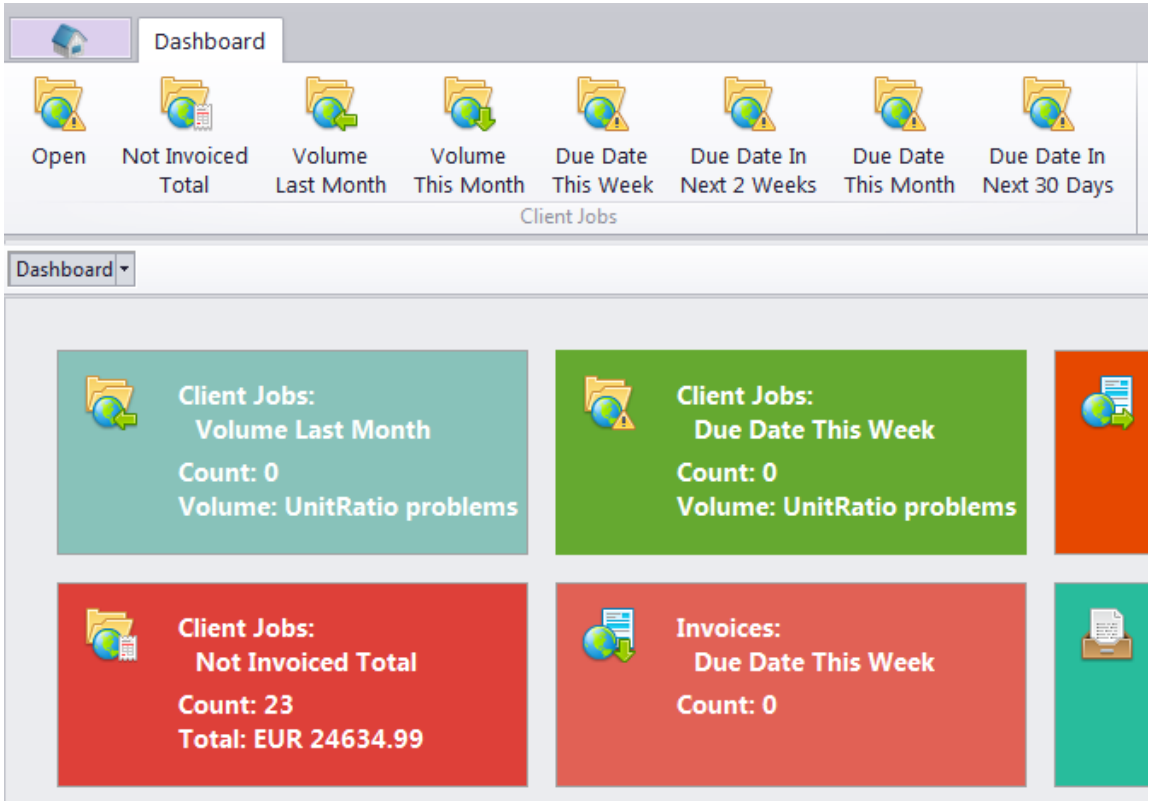
2. Click the **Transfer Database Files** button on the **Database Settings** window of TO3000 3D+.

3. Navigate the folder tree to the desired location for the database and click **Transfer database to the new location** .

The window will inform you if the currently selected folder is eligible for transfer. Click the **Default** button to return to the default database location.

4. Dashboard

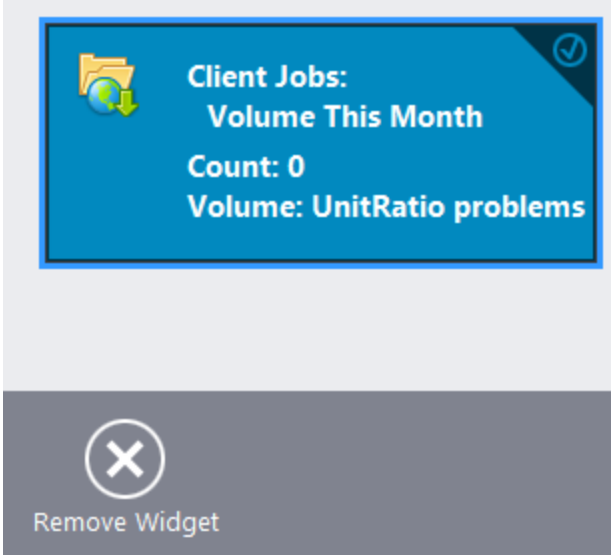
The **Dashboard** displays basic information about the state of Client Jobs, Invoices, and Projects in the form of a series of widgets.



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

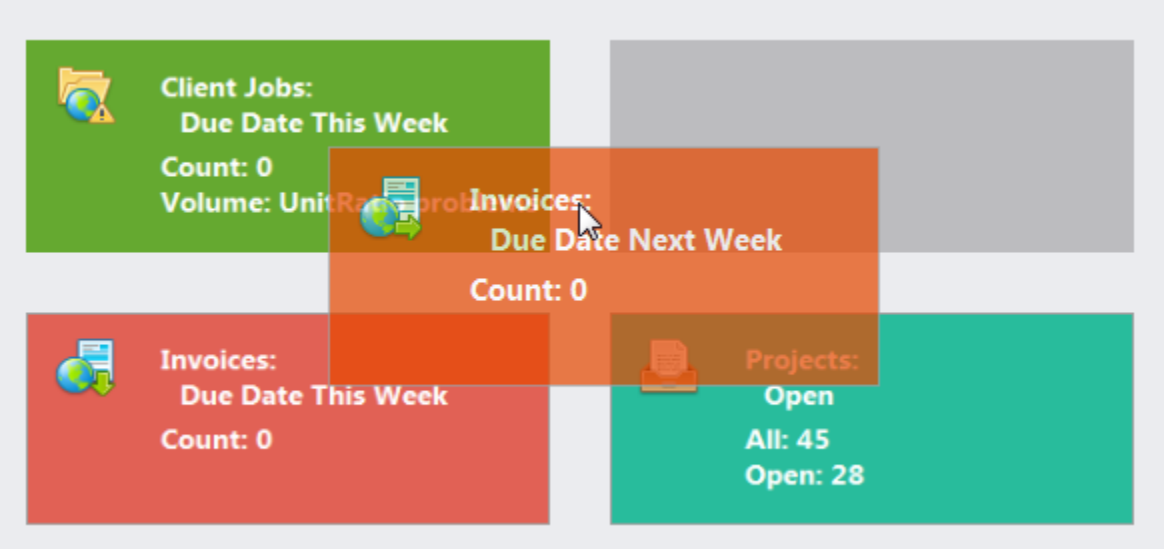
Left-clicking a widget will transport you to the corresponding table and automatically apply the required filters.

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



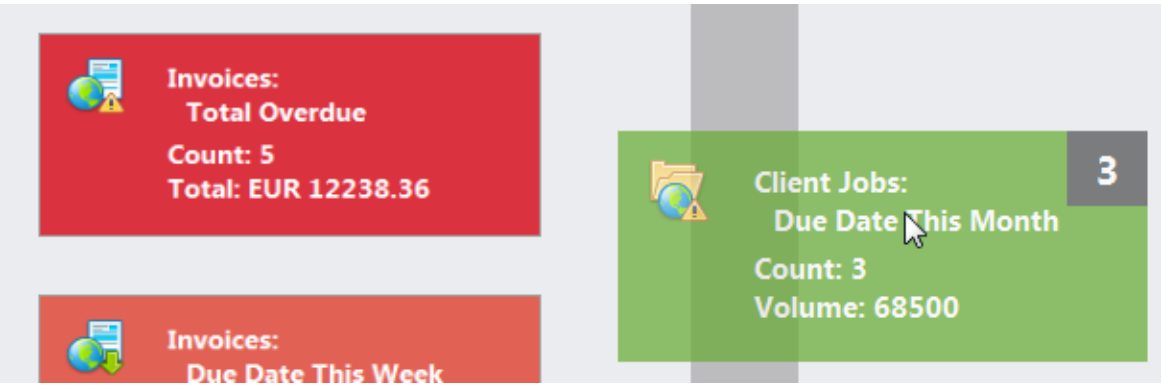
4.1. Moving and Grouping widgets

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

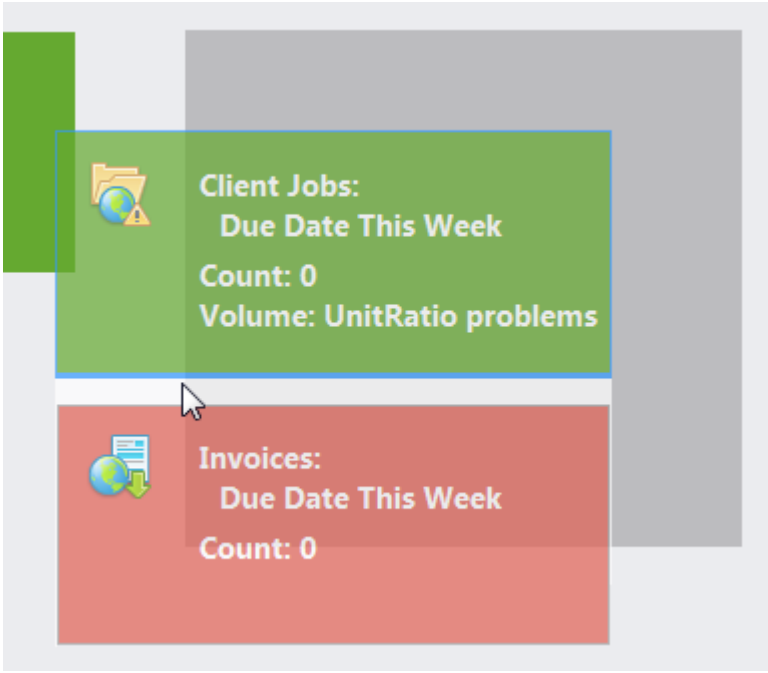


To move several widgets at once, right-click each, then click and drag one of the selected widgets.

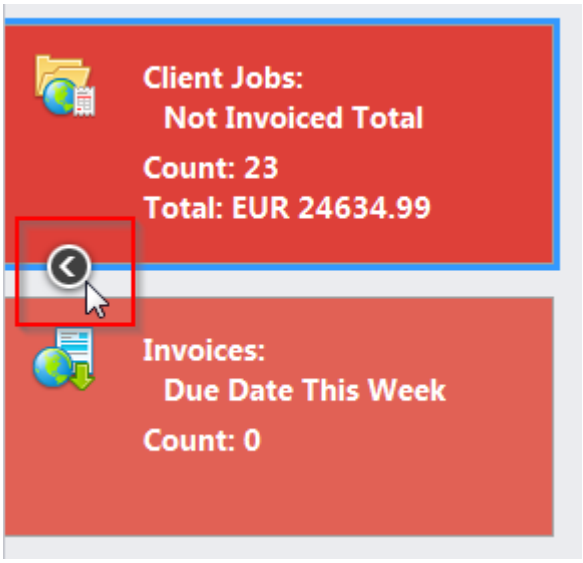
To create a new group of widgets, drag a widget towards the right side of the screen or in between existing groups. A thin vertical "shadow" indicates that the widget will create a new group when dropped.



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

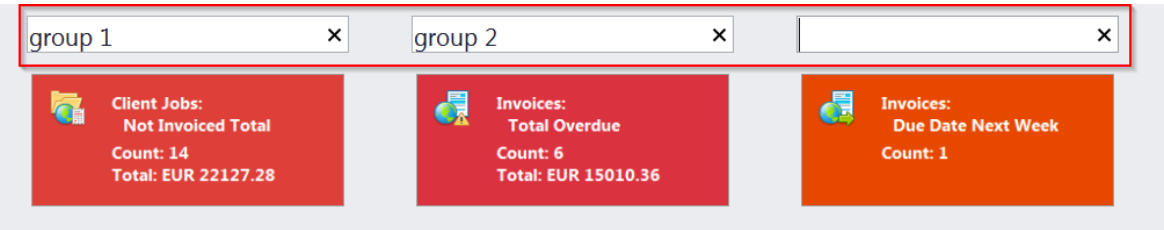


If the number of groups exceeds the width of the screen, you can scroll the screen by clicking the arrows that appear when you move your mouse to the left or right edge of the window, or by clicking and dragging the gutter between groups.

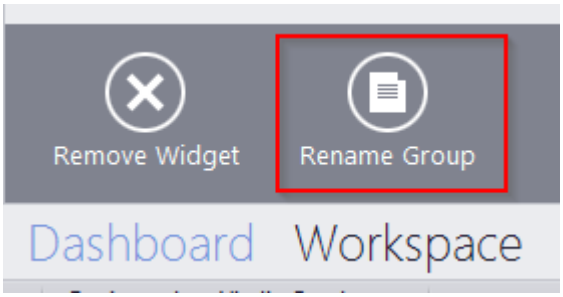


4.2. Naming groups

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



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



5. Workspace: Clients

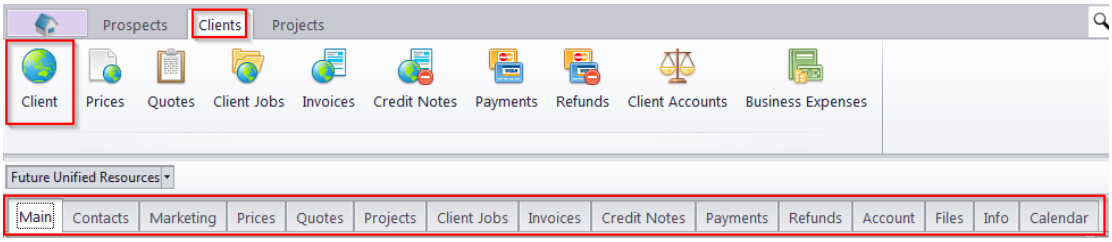
5.1. Client window

The 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*.

To open the **Client window** click the **Client** shortcut from the **Clients** tab of **the Ribbon.**

Client Window tabs

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



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

5.1.1. Main tab:

Browsing clients

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

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

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

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

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

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

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

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

NOTE: Due to filter operation (like the *local custom filter* and *global date filter*) you may not be able to see all the clients in the database. Please refer to Local Custom Filter topic for more details on filters and access restrictions.

Client profile

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

•**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 and quotes. You can also load the client's logo here. It will be displayed above their country's flag.

•**Name** — click this button to edit this client's name. This name can be up to 150 characters long.

•**Postal Address** — click this button to add or change the postal address of the client. See the Postal Address of Client topic for details.

•**Contact Info** — allows you to add or change the contact information of the client. See the General Contact Information topic for more details.

•**Web** — opens the **Edit Web Links** dialog box, providing fields to enter your client's web site address (URL), as well as their LinkedIn, Facebook, and Twitter accounts. Click the address or the social media icons to open the corresponding links in your Internet browser.

•**Payment Terms** — allows you to specify the payment terms for each client, and their minimum fees. According to these TO3000 3D+ will determine if your invoices to the client are outstanding, overdue or will be due soon. See the Payment Terms of Client topic for more details.

• **VAT Number** — enter the client's legal tax number to have it automatically displayed and printed on invoices.

•**Client Folder** — this part of the client's profile can be used to quickly create the client's folder and access client files. Click the Folder button on the right of the field to open the folder in TO3000 Explorer (creating it if it does not exist yet).

•**Client Currency** — this currency will be used to issue quotes and invoices to this client, and to record payments from this client. All the financial records for this client are kept in both your base currency and the client currency, converted according the exchange rates you set.

•**Next Codes** — click this button to edit the automatic counters for client-specific codes of quotes, client jobs, invoices and payments. TO3000 3D+ will use the codes for the next quote, client job, invoice and payment you create. You can only increase the next code value. See the Next Client Codes topic for more details.

•**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 printable invoices. See the Locale Format of Client topic for more details.

•**Invoicing Policy** — by adjusting the invoicing policy you determine the conditions upon which TO3000 3D+ will prompt you to invoice client jobs. See the Invoicing Policy of Client topic for more details.

•**General Information** — any additional information which did not fit into any of the other sections can be entered here.

•**FTP connections** — here you can set the parameters for access to the client's FTP folders. Shortcuts to these folders will be automatically added to the **Files** tab of this client's window. See the Client FTP Connections topic for details.

Custom data

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

Postal address of client

The Client's postal address 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 each 50 characters maximum. When editing invoice and quote templates you can choose which of the two addresses the invoice or quote contains.

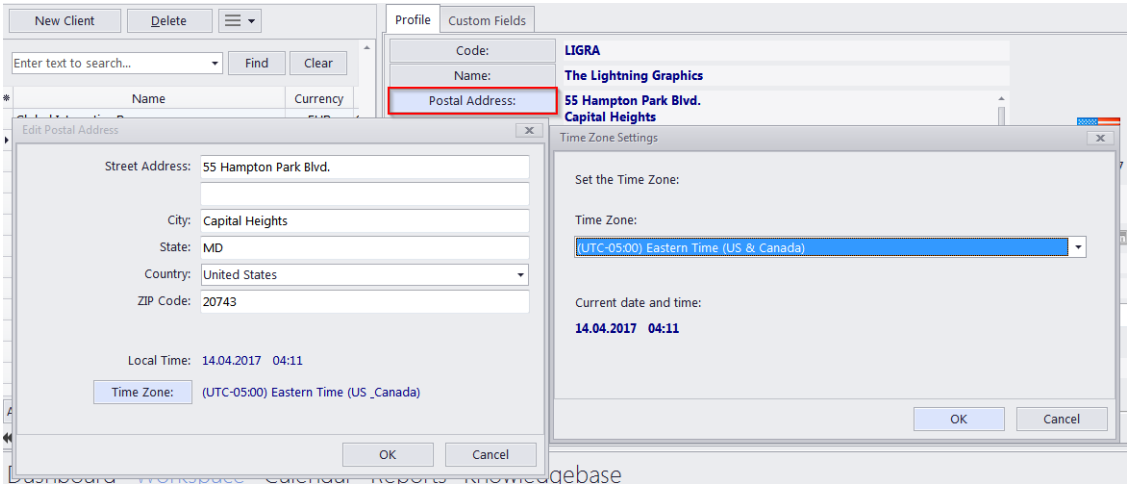
City — maximum 40 characters long.

State — maximum 40 characters long.

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

ZIP Code — maximum 10 characters long.

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



General contact information

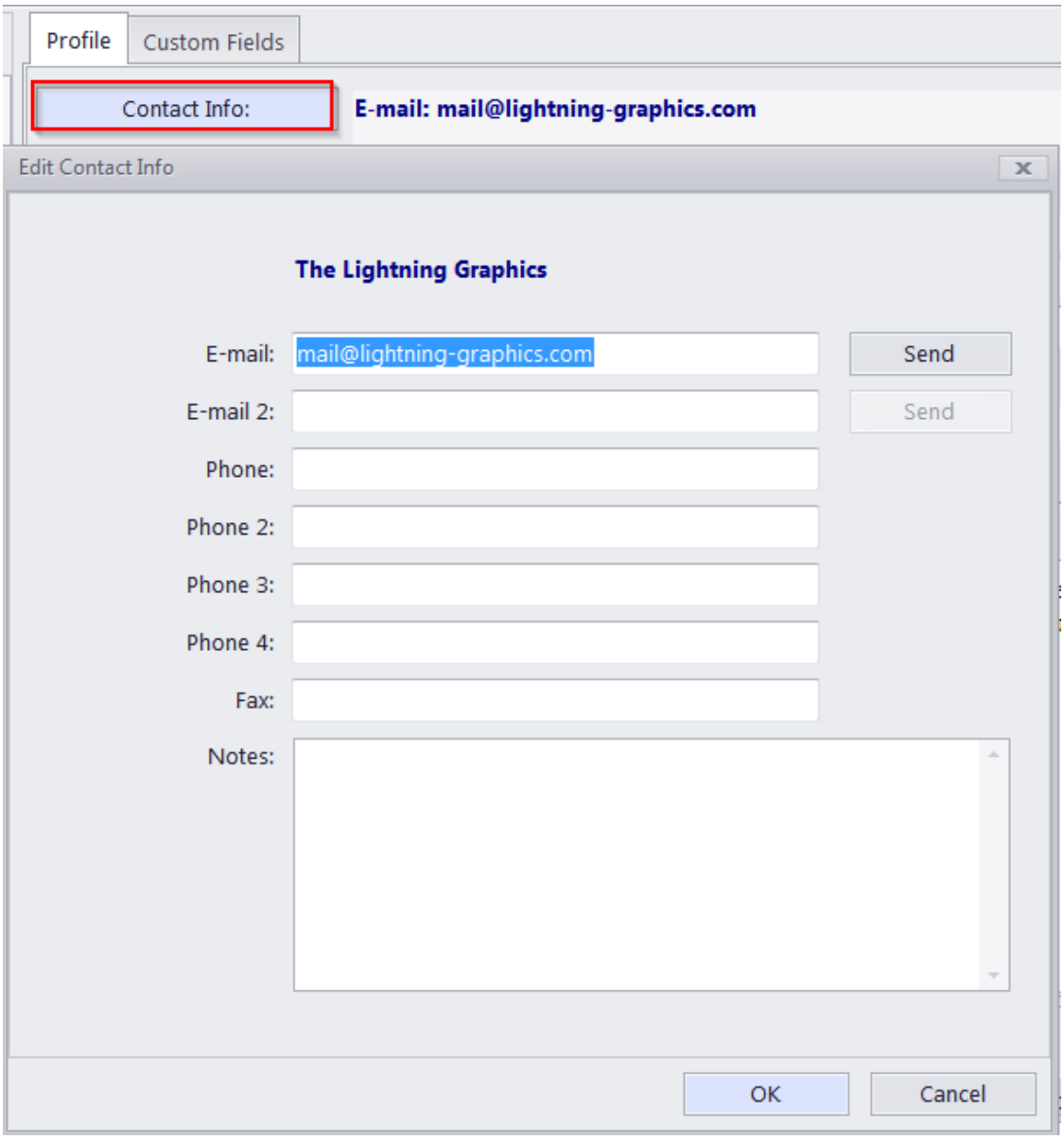
Clients in TO3000 3D+ have two types of contact information: general, and the contact information of the client's contact persons (Contacts of Client). A client's general contact information can contain the following data:

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

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

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

A client's general contact information can also be added to templates with the help of Client Information Variables.



Payment terms of client

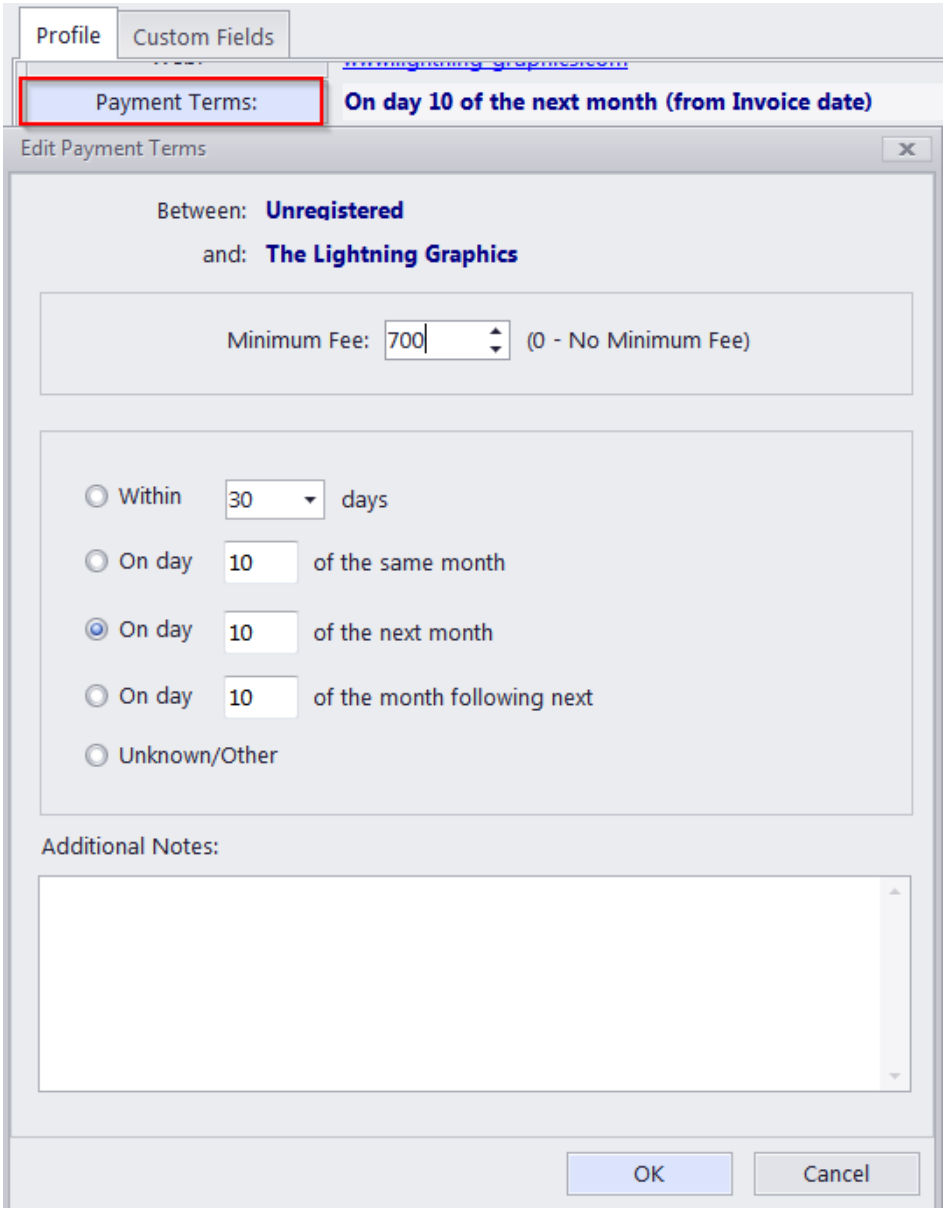
According to the payment terms of a client, TO3000 3D+ will keep track of unpaid invoices and update the status of outstanding invoices: overdue, due today, due tomorrow, and so on.

With the help of the **Edit Payment Terms** dialog you can configure the payment conditions of the 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 the minimum fee condition.

You can also indicate if the 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.



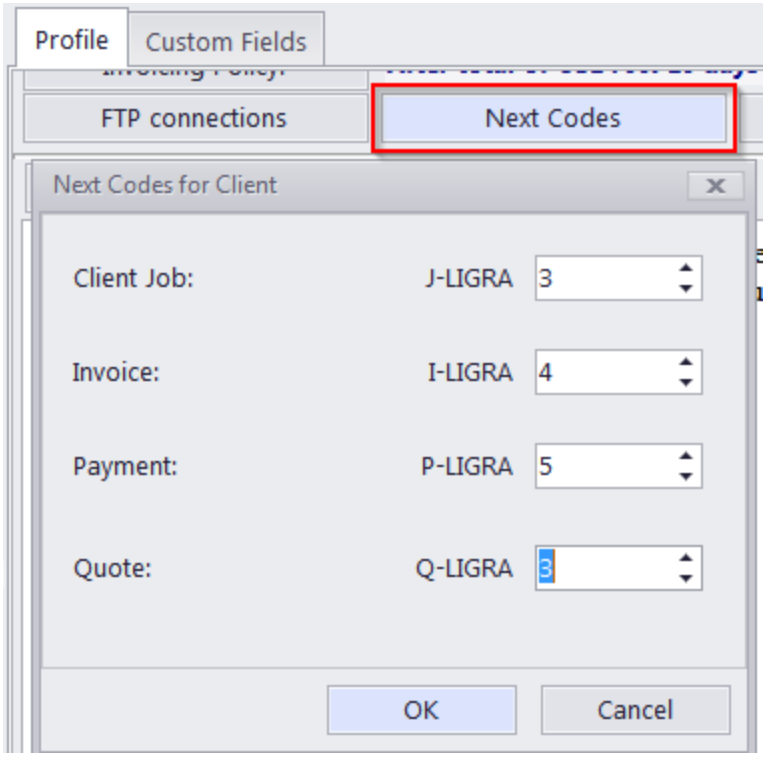
Next client codes

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

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

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

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



Locale format of client

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

To have invoices to clients printed according to their own *Regional and Language options* (normally defined in the *Windows Control Panel*), TO3000 3D+ can use separate locale formats 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 a negative amount is indicated with a "minus" put before number: -100.00. In other countries a negative amount must be written in parentheses: (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 — TO3000 3D+ 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 the number of digits after decimal is set to 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* the digit grouping symbol is a whitespace.

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

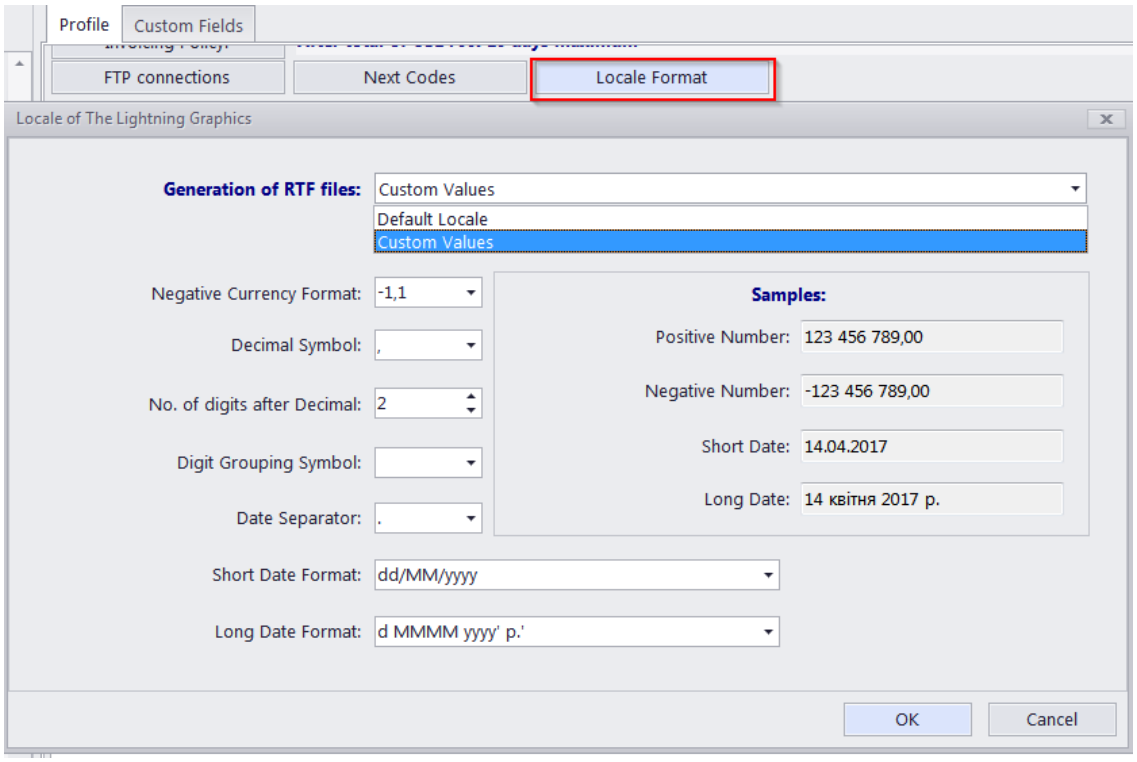
Short Date Format — this is format for the short date display (like *3,31,2008*). Enter the required date format into this field or select one of the available formats using the drop-down list. Use d to indicate the day, m – for the month, and y – for the year. The date separator characters can be entered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

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

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

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

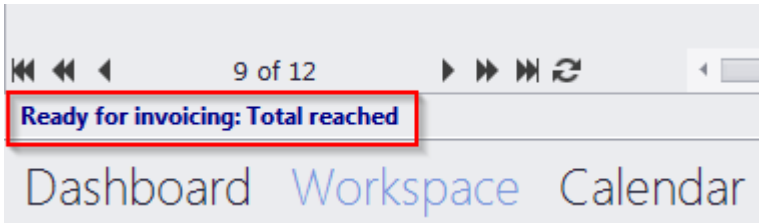
To configure the locale settings for a certain client, click the **Locale Format** button in this Client's profile.



Invoicing policy of client

Invoicing policy settings determine when TO3000 3D+ alerts user to invoice a client's jobs. According to these settings TO3000 3D+ will assign one of the following statuses to a client's uninvoiced client jobs as a whole: **Not ready for invoicing** or **Ready for invoicing**, followed by a comment, depending on the current *Invoicing policy settings*, for example, "**Total reached**".

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

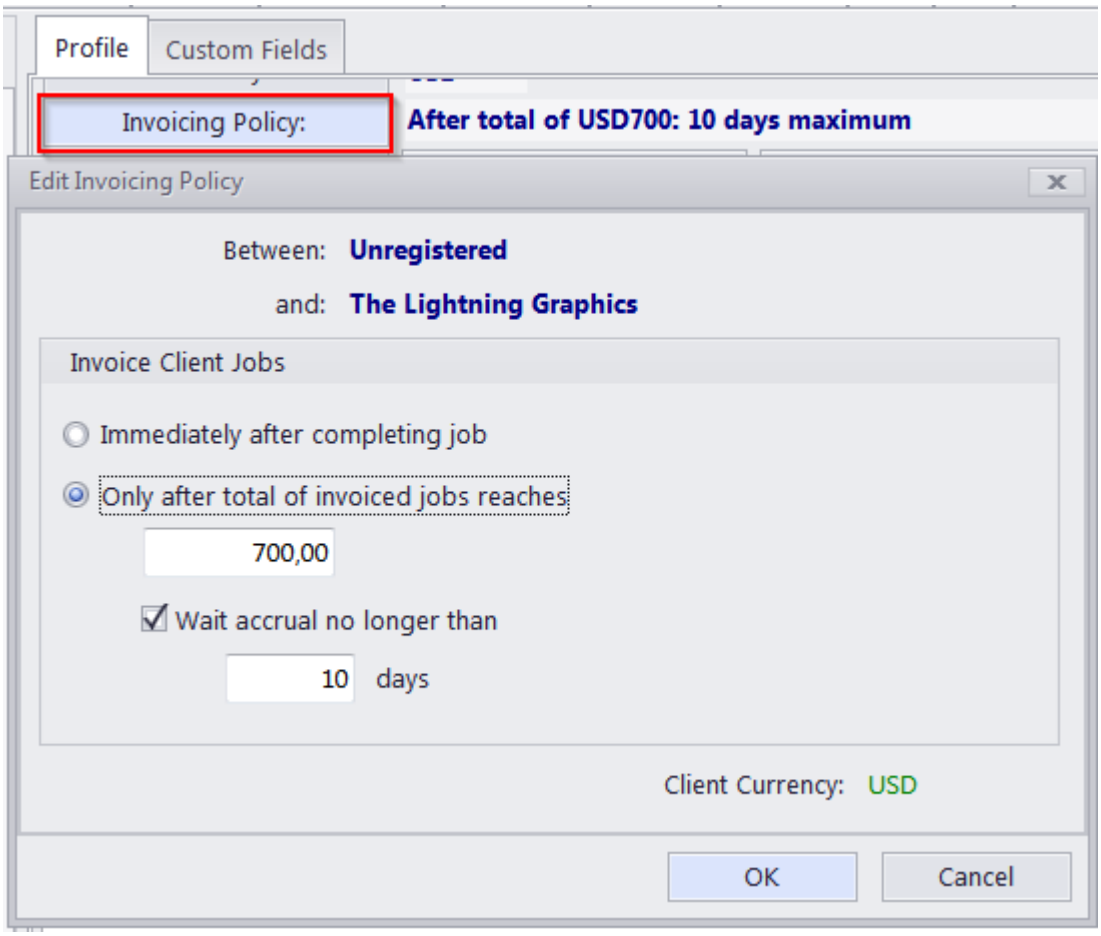


By default, the invoicing policy for all clients states that client jobs must be invoiced immediately after a client job has been completed.

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

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

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



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

Client FTP connections

FTP (File Transfer Protocol) is a common method of sharing and exchanging work files. Each client profile in TO3000 3D+ can have a number of FTP connections (addresses of shared folders) associated with this client. These folders can then be quickly accessed by any user working with the Files tab of this Client.

The *FTP Connection* interface in TO3000 3D+ allows for quick access to the specified FTP folder without having to re-type the login and password each time you connect. The following details can be specified when creating a connection:

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

FTP Server — the address of the FTP server (for example *ftp.server.com*). Can be no longer than 50 characters.

User Name — a login, normally issued by the FTP server administrator. This login will be used when TO3000 3D+ attempts to connect to FTP. Can be no longer than 50 characters.

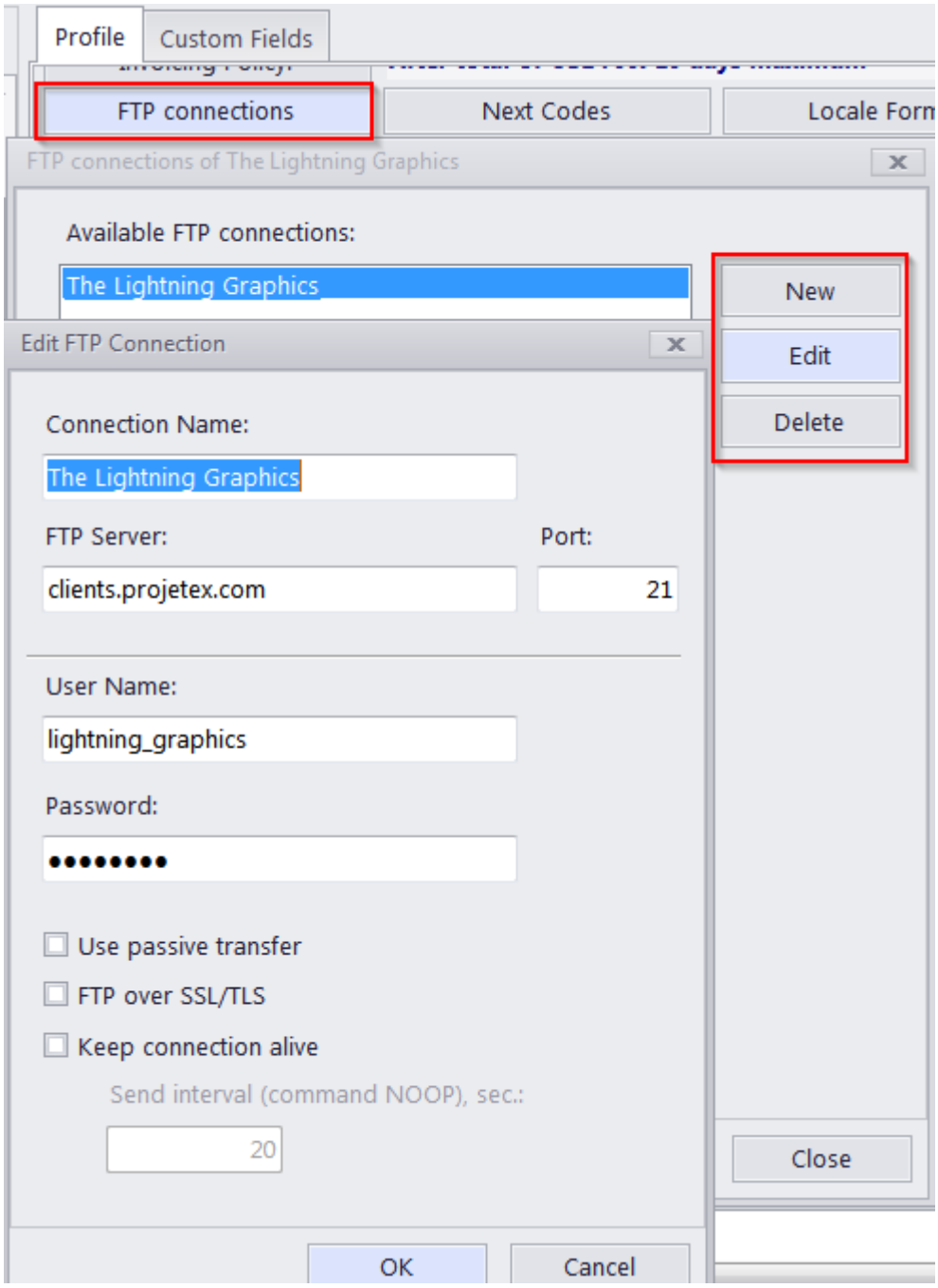
Password — this password will be used when TO3000 3D+ attempts to connect to FTP.

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

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 TO3000 should continue trying to connect to a non-responding FTP address. If this option is enabled, you can also set the interval between connection attempts.

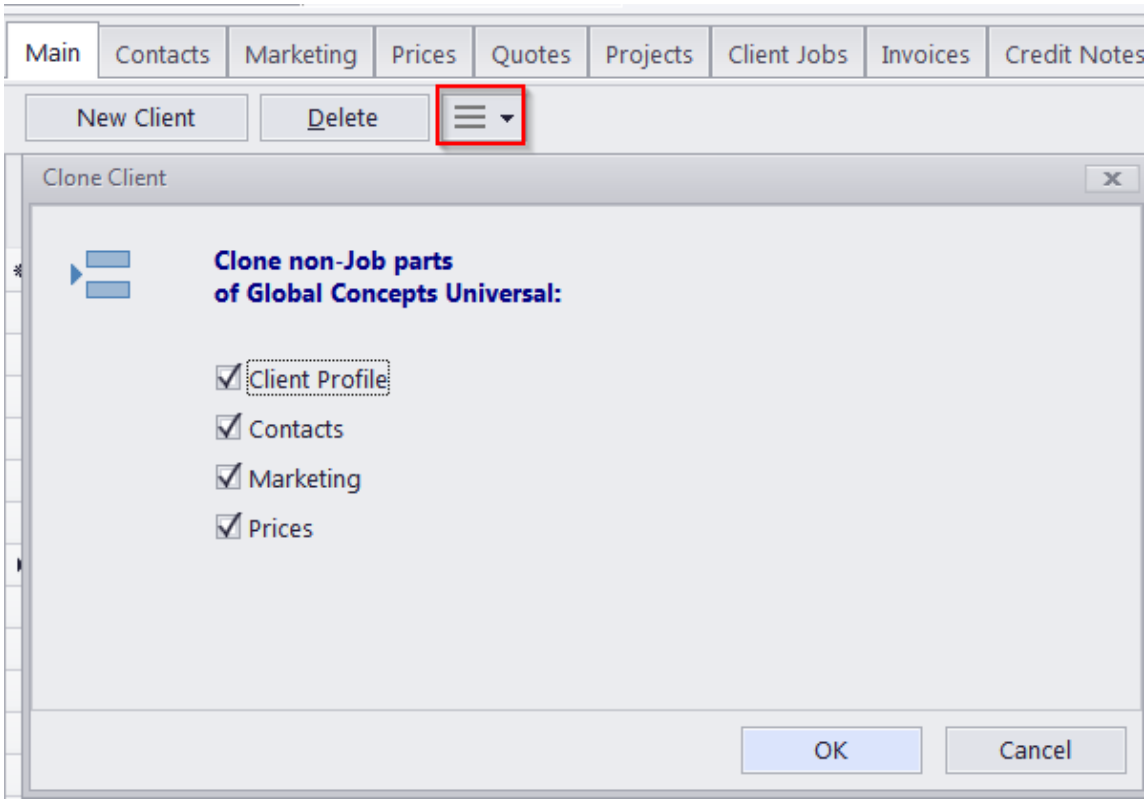
To add, edit or delete the FTP connections of a certain client, click the **FTP Connections** button in this Client's profile.



Cloning and converting a client

Cloning

In case the client you are about to create, has the same or similar data as one of the existing clients, it is recommended to use the clone option to copy selected data from the existing client to a new one.



The following data can be copied:

Profile — although it is unlikely that two different clients will have the same profile information (like address or contact details) some information such as payment terms, invoicing policy and locale settings may be common.

Contacts — cloning contacts (**Contacts** tab of the **Client** window) data may save time when creating a client for a new department or subsidiary of an existing client.

Marketing — marketing information (**Marketing** tab of the **Client** window) can also be cloned.

Prices — if a new client has the same or similar prices (**Prices** tab of the **Client** window) as one of the existing **Clients**, this data can also be cloned.

To clone a client record, select the required client from the list on the **Main** tab of the **Client** window, click the **More...** button and select **Clone**. Newly cloned client will appear in the list with the CLONED string added to their name.

Converting a client into a prospect

If you no longer actively work with a particular client, you can convert that client into a Prospect.

All the database entries connected to the client and all of the client's files will be moved into the Prospects database.

To convert a client in to a prospect, click the **More...** button and select **Move to Prospects.**

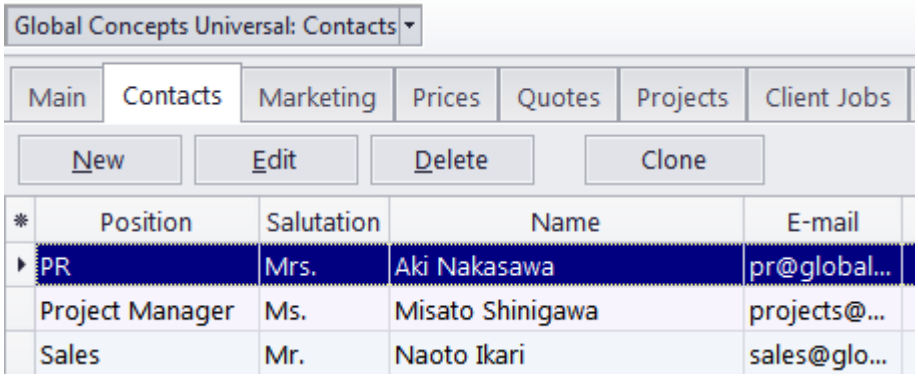
5.1.2. Contacts tab

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

- Contacts can be associated with projects (by putting one of the client's contacts into the Client PM field).
- Contacts of the client can also be a added to invoices' **Attention** fields.

To manage your client contacts, open the **Main** tab of the **Client** window, select the required **Client** and click the **Contacts** tab.

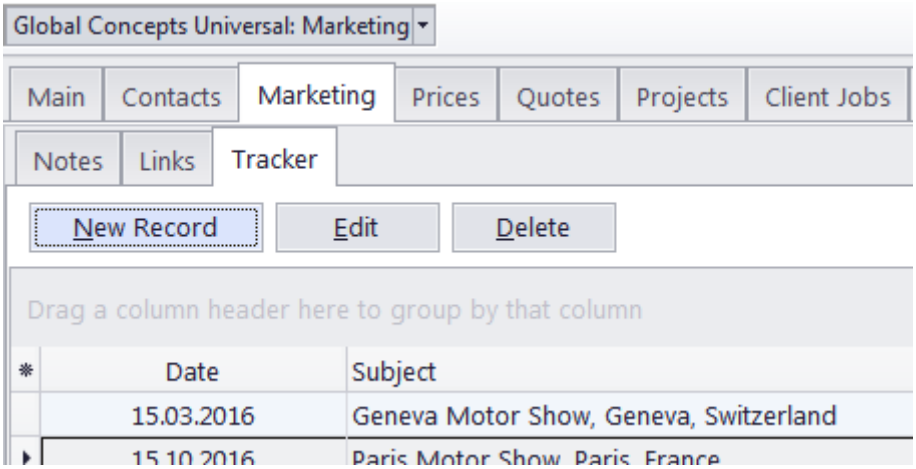
Here you can create new contacts, as well as edit, delete and clone existing ones.



5.1.3. Marketing tab

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

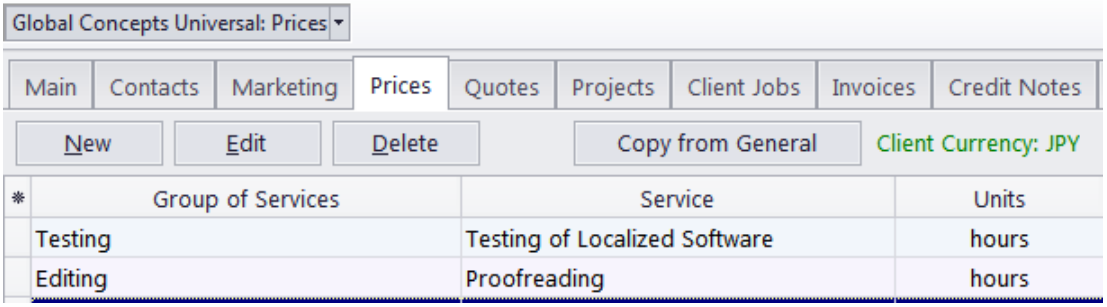
The **Marketing Tracker** can contain any number of records, each having a **Date**, **Subject** (250 characters maximum) and **Description** (plain text note with no length limitation). The **Date** and **Subject** fields of a record cannot be empty. Records in the **Marketing Tracker** can be sorted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



5.1.4. Prices tab

Each client in TO3000 3D+ can have a set of prices individual to them. These prices can be assigned on the **Prices** tab of the **Client** window.
To view and manage the individual price-list for a certain client, open the **Main** tab of the **Client** window, select the client in the list and click the **Prices** tab. Only one price per group of services, service and unit combination can exist in the individual price-list.
You can *print the client's price list* or save it in a text file by selecting the template and clicking **Save**, **Save and Open** or **Print** buttons at the bottom of the window. Click **Send Mail** to open the Mail Sender for the generated price list. Templates used to print price-lists can be configured by clicking **User Settings** in the **Backstage** view and selecting the **Templates** section. Templates for prices are stored in the *C:\Users\Public\Documents\AIT\TO3000, Version 3D\Templates\CLIENTS\Prices* folder.

Prices can be quickly copied from the general price-list to the individual price-list with the help of the **Copy from General** button.



5.1.5. Quotes tab

Quotes to client can be managed on the **Quotes** tab of the **Client** window. A quote can contain a number of draft client jobs, each job representing a service and its price being quoted.

Like most workflow documents in TO3000 3D+, quotes can be saved to a printable file or printed. Please refer to the Creating quotes to clients topic for more details.

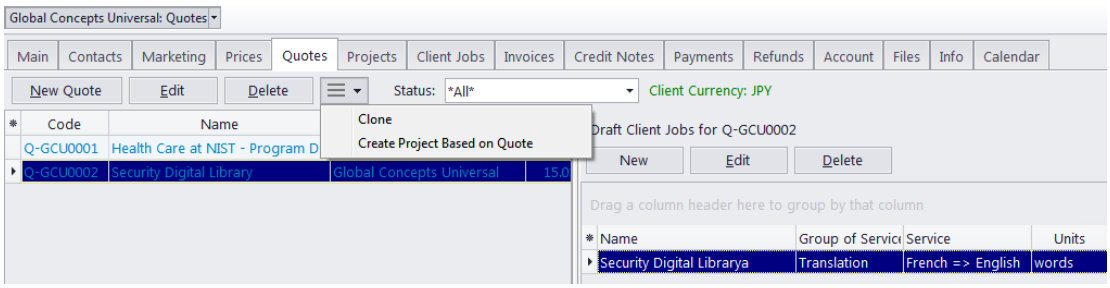
Accepted quotes can be used to quickly create projects based on them. When you create a project based on quote, all *draft client jobs* of this quote become *client jobs* in the new project, retaining their *service*, *volume* and *price* information. Creating a project based on a quote will not delete the quote itself.

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

- blue for Unknown
- green for Accepted
- red for Rejected
- purple for Received or Corrected

The status of a quote can be changed in the **Edit Client Quote** window. Please refer to the Creating quotes to clients topic for more details.

To manage quotes for a certain client, select the client in the list on the **Main** tab of the **Client** window and click the **Quotes** tab.

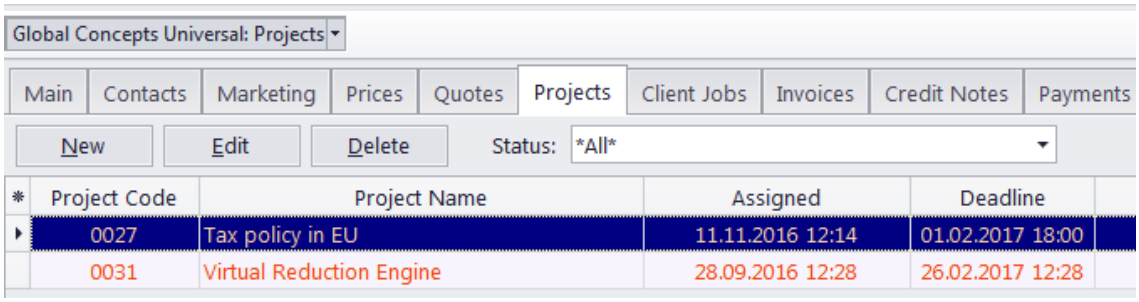


5.1.6. Projects of client (With Projects Mode only)

All projects of the currently selected client can be viewed 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 selected client.

Project Statuses

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



Project Statuses

Projects in the list are marked by color depending on their status:

- 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*.

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

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

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

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

Filtering

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

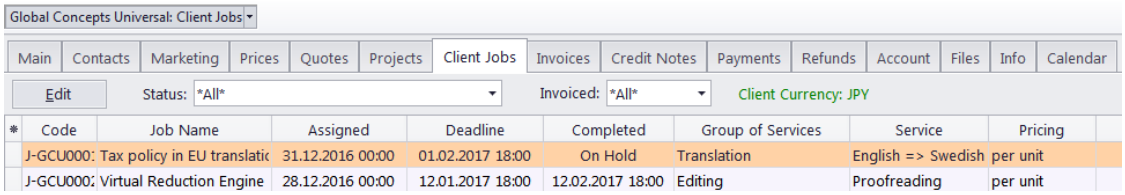
5.1.7. Client jobs tab

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

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

If you have set an invoicing policy for this client in this client's profile on the Main tab, TO3000 3D+ will advise you whether the jobs are ready for invoicing or not.



Client Job statuses

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

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

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

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

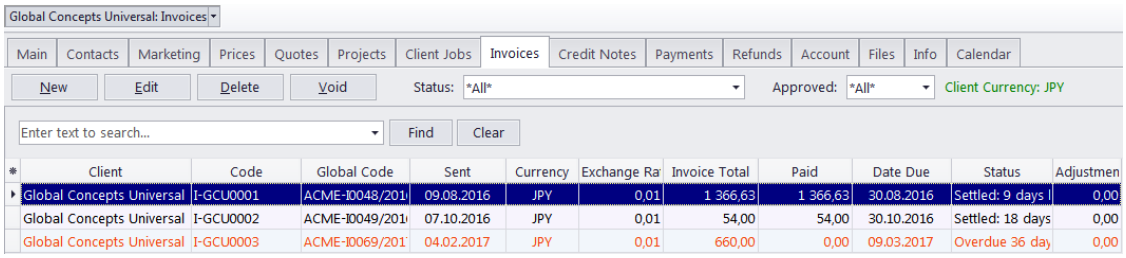
- Orange background — *On Hold* status
- Green background — *Heads-Up* status
- Grey background — *Canceled* status

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

5.1.8. Invoices tab

Invoices in TO3000 3D+ are issued for *client jobs*. One invoice can contain a number of *client jobs* from different *projects*. A job which has been added to an approved *Invoice* cannot be edited.

The **Invoices** tab of the **Client** window is used to issue and keep track of invoices to the currently selected **Client**. All invoices issued to this Client are displayed in the table. To open the **Invoices** tab, open the Client window, select a client and then click the **Invoices** tab.



Invoice statuses

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

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

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

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

Black – the invoice has been *settled* (paid).

Status colors can be customized with the help of **User Settings** in the **Backstage** view. Click the **Colors: Statuses** section of the **User Settings** window.

TO3000 3D+ automatically assigns statuses to invoices depending on the Payment Terms of Client.

Filtering

To display only invoices with a particular status click the **Status** filter drop-down list.

You can display only those invoices which have or have not been approved by applying the **Approved** filter.

5.1.9. Credit notes tab

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

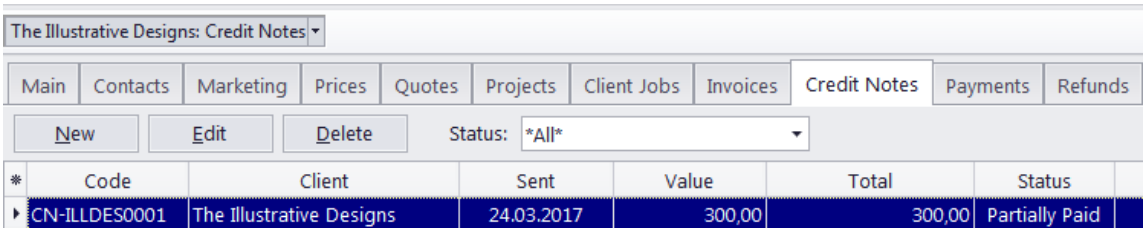
The **New** button opens the **New Credit Note** window, where a new credit note can be created. Credit notes must be linked with an invoice when created.

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

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

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

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



Credit Note Statuses

Credit notes can have one of four statuses:

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

Filter

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

5.1.10. Payments tab

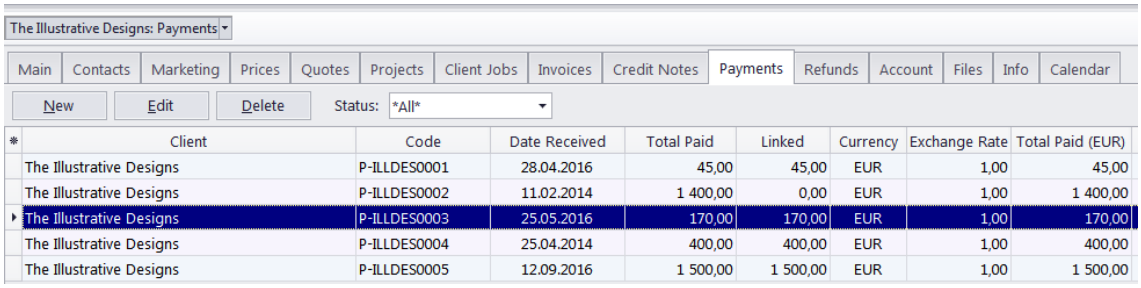
The **Payments** tab of the **Client** window displays the payment records of the currently selected client.

Here you can create and manage the payments received from this particular client.

Use the **Status** filter to show only payments with a particular status.

Payments can be linked to invoices, fully or partially, to settle them. Payments are also added to profit analysis on account tabs.

By default, payments values are displayed in the client's currency. Use the **Customize columns** option to configure which payment data must be displayed.



Client	Code	Date Received	Total Paid	Linked	Currency	Exchange Rate	Total Paid (EUR)
The Illustrative Designs	P-ILLDES0001	28.04.2016	45,00	45,00	EUR	1,00	45,00
The Illustrative Designs	P-ILLDES0002	11.02.2014	1 400,00	0,00	EUR	1,00	1 400,00
The Illustrative Designs	P-ILLDES0003	25.05.2016	170,00	170,00	EUR	1,00	170,00
The Illustrative Designs	P-ILLDES0004	25.04.2014	400,00	400,00	EUR	1,00	400,00
The Illustrative Designs	P-ILLDES0005	12.09.2016	1 500,00	1 500,00	EUR	1,00	1 500,00

5.1.11. Refunds tab

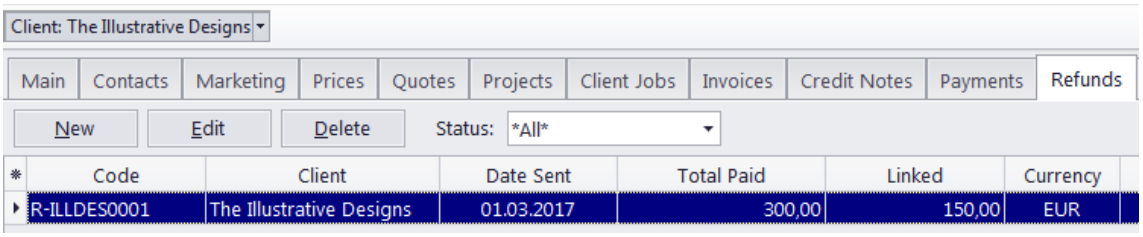
The **Refunds** tab of the **Client** window displays the refund records of the currently selected client.

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

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

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

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



Code	Client	Date Sent	Total Paid	Linked	Currency
R-ILLDES0001	The Illustrative Designs	01.03.2017	300,00	150,00	EUR

Filter

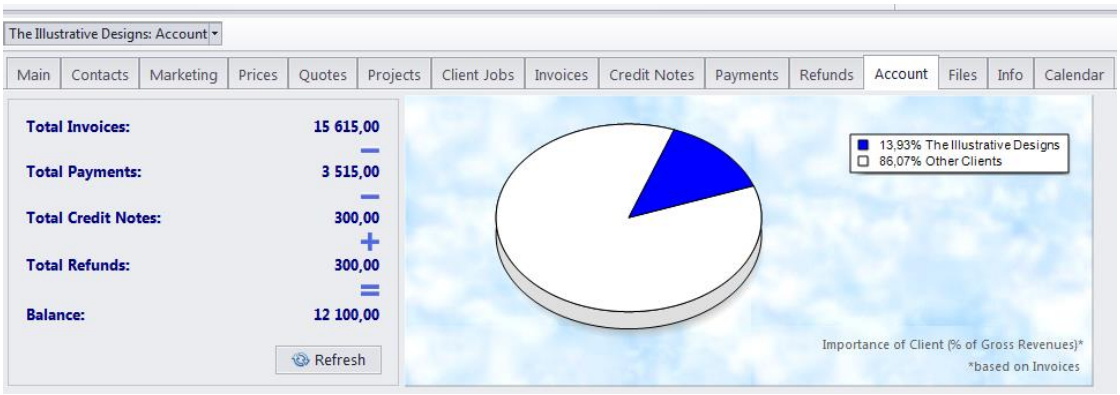
Use the **Status** filter drop-down list to display only refunds which are still to be linked with a credit note, or only those, which have been fully linked.

5.1.12. Account tab

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

•Totals of payments, invoices, credit notes, refunds and account balance, as calculated from the previous figures;

•A pie chart showing the share of this client in Gross Revenues.

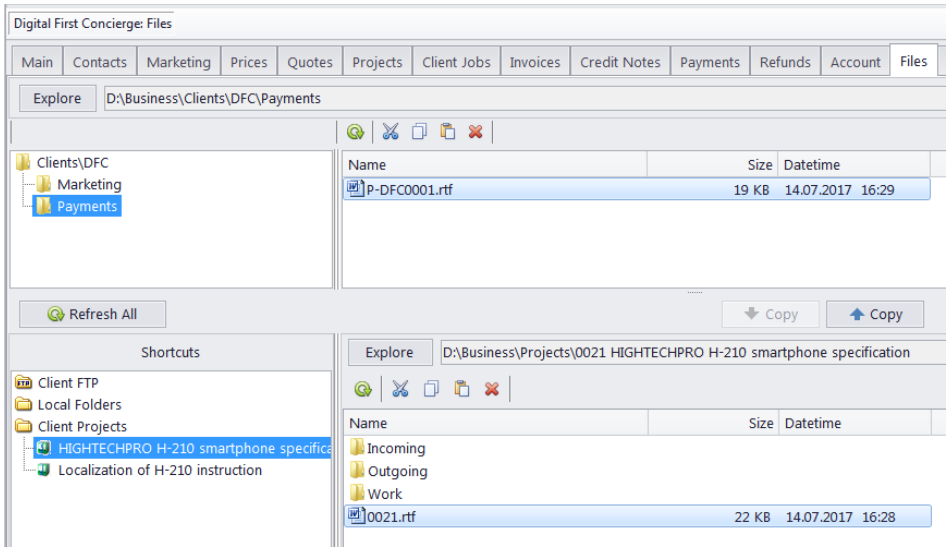


To open the **Account** tab, open the Client window and then click the **Account** tab.

5.1.13. Files tab

The **Files** tab of the **Client** window provides you with the ability to create, view and search for files and folders related to the selected client. Folder navigation is described in the File manager topic.

Client files usually consist of invoices, quotes and other documentation.



5.1.14. Info tab

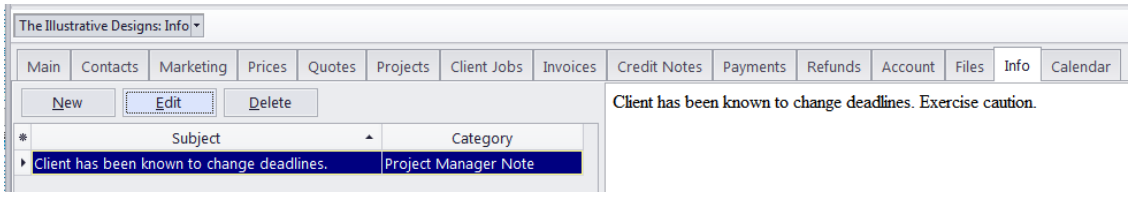
The **Info** tab of the **Client** window can be used to enter any optional additional information regarding the selected client in plain text format. Notes can be filtered by custom categories.

Subject — maximum 100 characters long.

Category — new categories of notes can be added by clicking **User Settings** in the **Backstage** view and selecting **Categories**. See the Categories topic for additional details.

Information — a plain text note with no maximum length.

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

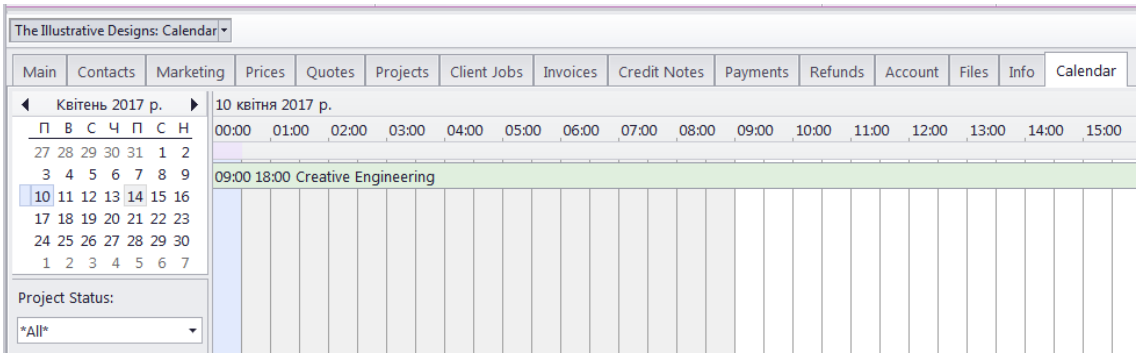


5.1.15. Calendar tab

The **Calendar** tab of the **Client** window displays this client's projects in the visual format of *calendar blocks.* Each block stretches across the calendar from assignment until completion, or until the deadline if the project has not been completed yet.

Double-click any block representing the project to open the **Edit Project** window for it..

See the Using Calendars topic for more information on calendars.



Project block colors

Like the Projects they represent, calendar blocks can have different colors, depending on the statuses of respective 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*.

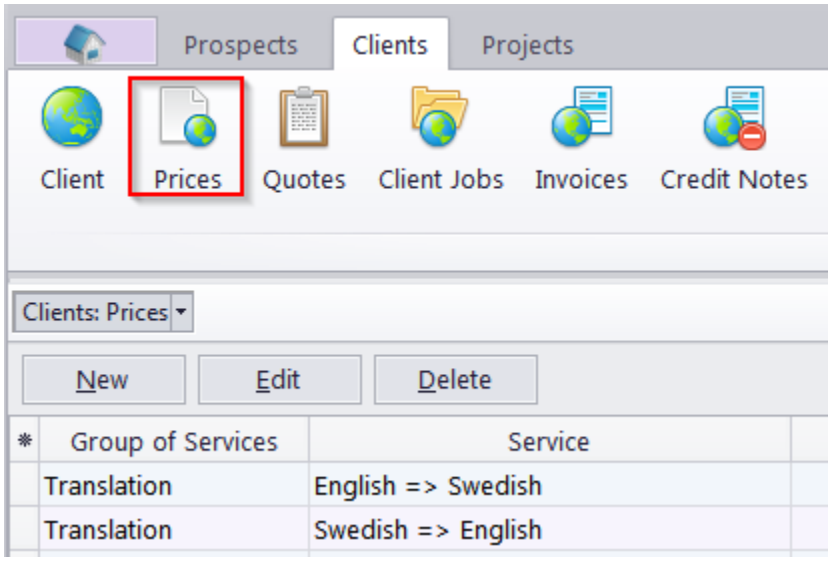
Pale Orange — the project is *On Hold.*

5.2. 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.

Prices can be created and managed here.

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



You can *print your general price list* or save it in a text file by selecting an RTF template and clicking **Save**, **Save and Open** or **Print** buttons at the bottom of the window. Click **Send Mail** to open the Mail Sender for the generated price list.
Templates used to print price-lists can be configured by clicking **User Settings** in the **Backstage** view and selecting the **Templates** section. Templates for prices are stored in the *C:\Users\Public\Documents\AIT\TO3000, Version 3D\Templates\CLIENTS\Prices* folder.

5.3. Client Quotes window

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

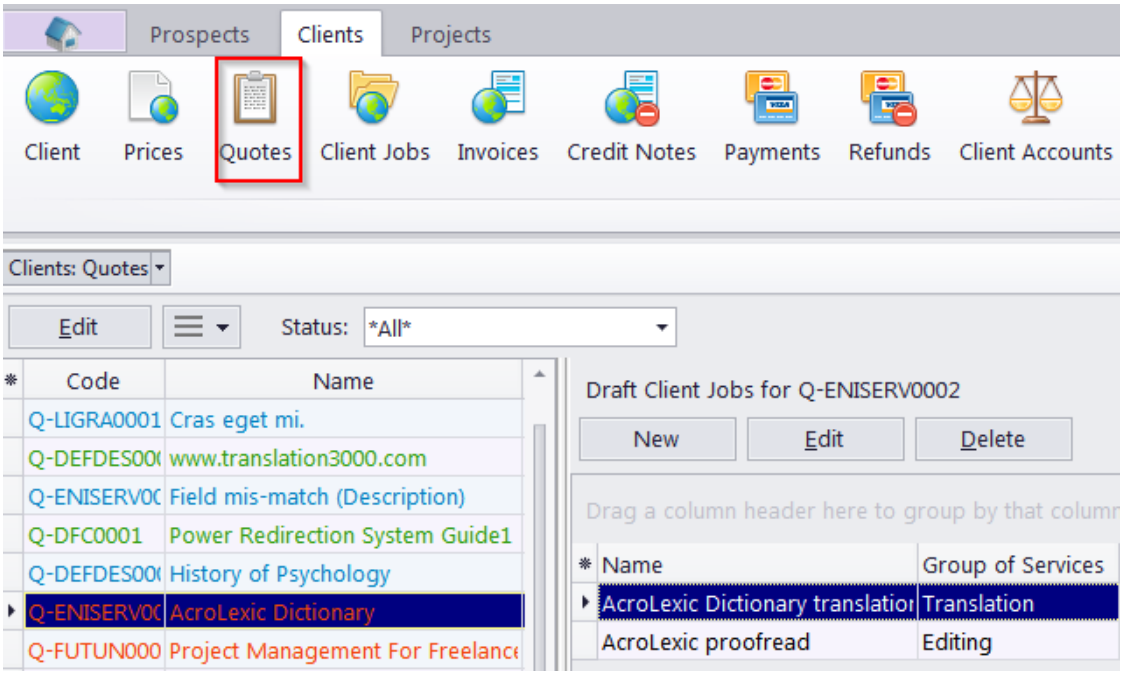
– **Quotes to Clients** window displays all quotes for all clients.

– New quotes cannot be created using this window.

– Existing quotes cannot be deleted using this window.

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

To quickly create a project based on a quote, select it and click the **Create project Based on Quote** button. This will create a project with the same timeline and client jobs as in the quote the project was based on.



Quote Status

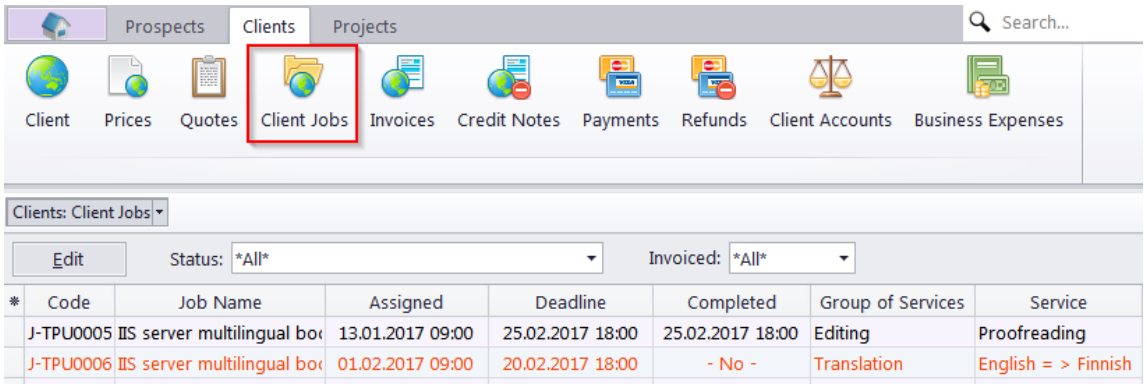
A quote can have one of the five statuses: *Unknown*, *Accepted* , *Rejected, Received and Corrected*. Depending on its current status, the quote will be marked with a different color in the quotes list:

- blue for Unknown
- green for Accepted
- red for Rejected
- purple for Received or Corrected

5.4. Client Jobs window

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

- The **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.



Filters

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

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

If you have set an *invoicing policy* for this client in the client's profile on the **Main** tab of the **Client** window, TO3000 will advise you whether the jobs are ready for invoicing or not.

Client Job statuses

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

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

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

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

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

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

5.5. Client Invoices window

The **Client Invoices** window offers a general overview of all Invoices issued to all Clients in the database. It can be used to identify currently unpaid invoices, obtain the total due balance 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 the **Invoices** tab of the **Client** window. The major differences are:

•The **Invoices to Clients** window displays all invoices for all clients.

•New invoices cannot be created using this window.

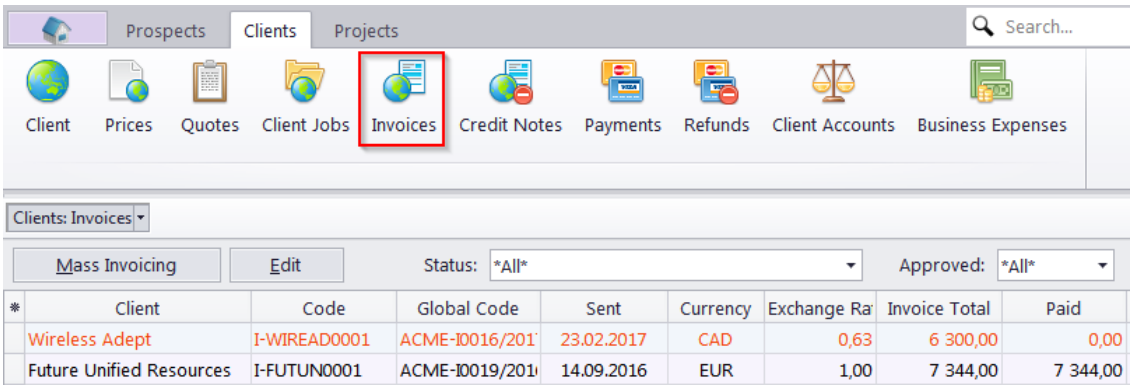
•Existing invoices cannot be deleted using this window.

To create a new invoice to a client, open the **Main** tab of the **Client** window, select the required client, click the Invoices tab and create the invoice from there. See the Creating invoices to clients topic for details.

To quickly create a large number of Invoices, click the **Mass Invoicing** button. See the Mass action topic for details.

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

Use the **Approved** filter drop-down list you can select to display only the **Invoices** which have or have not been approved.



Invoice statuses

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

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

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

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

Black – the invoice has been *settled* (paid).

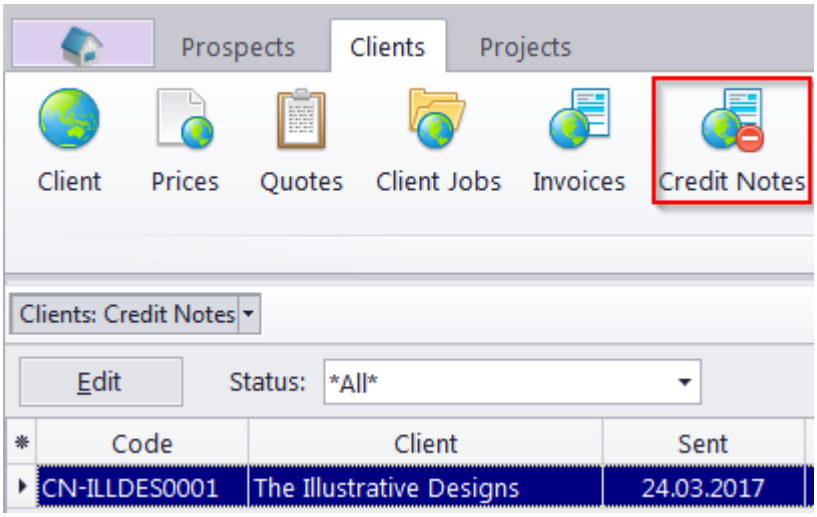
TO3000 3D+ automatically assigns statuses to Invoices depending on the Payment Terms set for each client.

5.6. Client Credit Notes window

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

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

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



Credit Note Statuses

Credit notes can have one of four statuses:

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

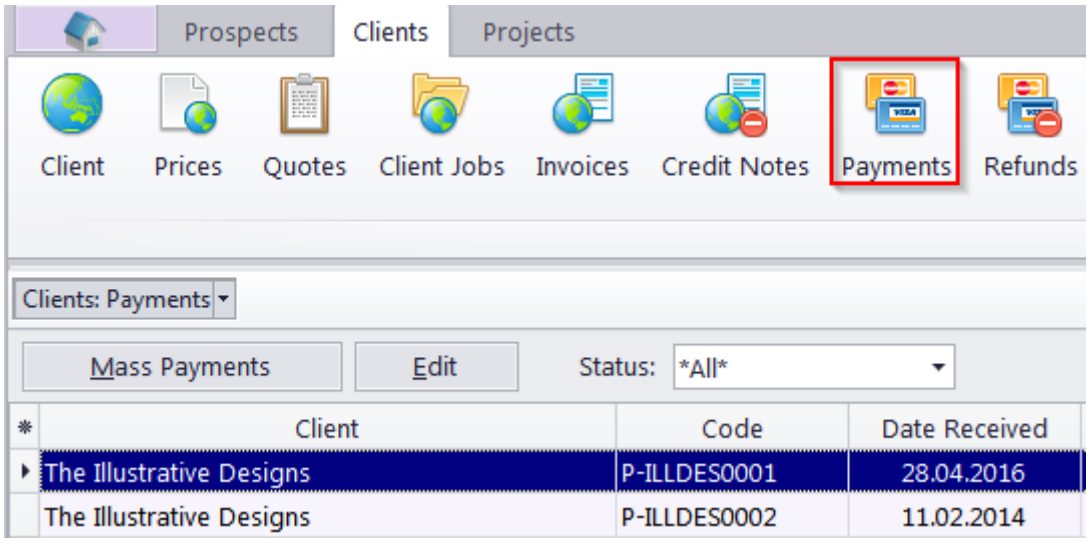
Filter

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

5.7. Client Payments window

The **Client Payments** window displays all payments from all clients in one table. This window can be used to obtain total values of money transfers received from Clients, as well as to register multiple payments in one session with the help of the Mass action feature.

Use the **Status** filter drop-down list to display only **Payments** which are still to be linked with invoices, or only the fully linked ones.

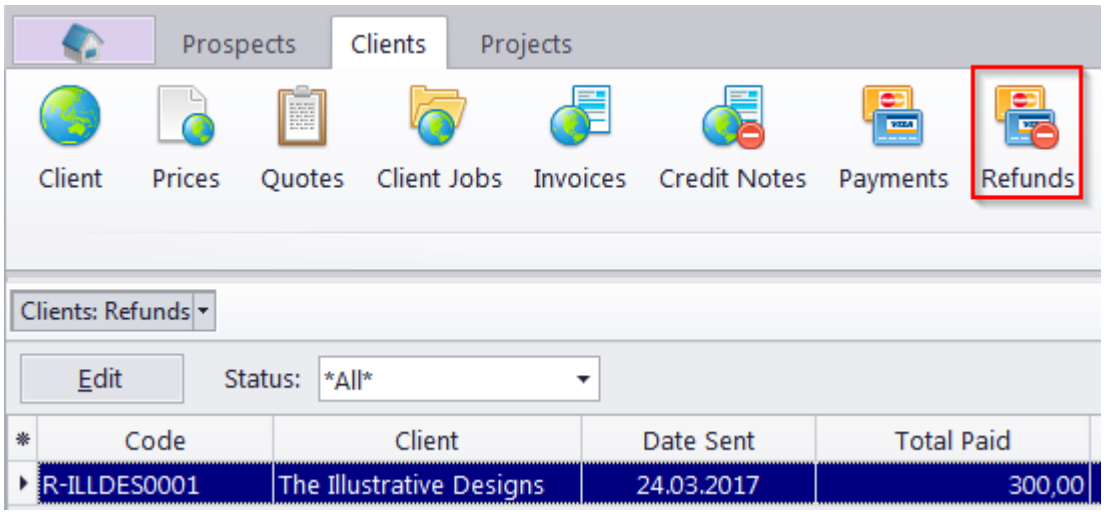


5.8. Client Refunds window

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

- The **Refunds to Clients** 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 can not be edited. Refunds are also added to company profits analysis on balance tabs.



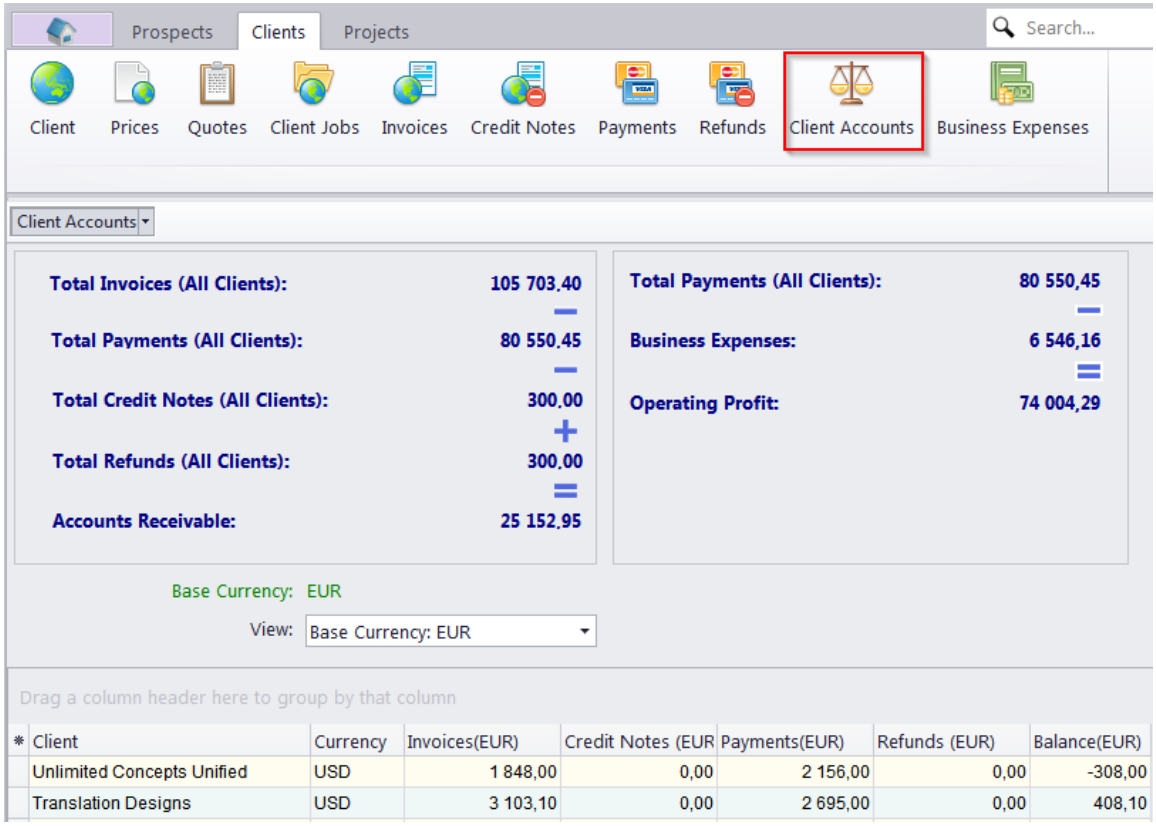
Filter

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.

5.9. Client Accounts window

The **Client Accounts** window presents a simplified balance sheet of your Clients based on their payments, invoices, credit notes and refunds. You can use this window to identify which Client's accounts require attention. you can also see your operating profit here, calculated as Total invoices minus business expenses.

Accounts can be viewed both in the Client's currency and in your Base currency: use the **View** drop–down list to select in which currency do you wish to view records. Alternatively, you can use the **Customize columns** option to add columns to the view. The columns containing the base currency's abbreviation display records in your base currency.



NOTE: To view the global balance, please select the **Base Currency** option in the **View** drop–down list.

5.10. Business Expenses

Any additional *expenses* can be entered into database with the help of the **Business Expenses** window. These expenses are used when calculating the total balance.

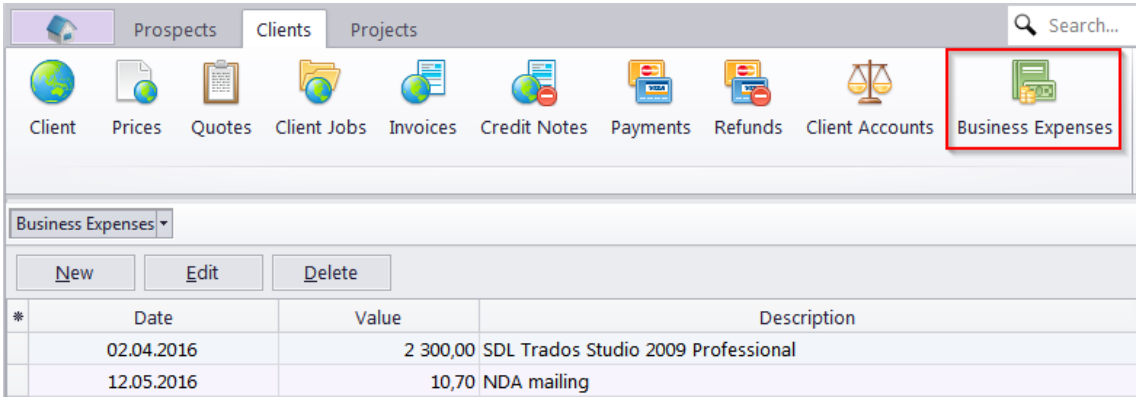
To open the **Business Expenses** window click on the **Business Expenses** icon in the **Clients** section of **the Ribbon**.

Business expense record contains default fields:

Date - the date when the expense was handled

Value - value of the business expense

Description - any additional information about the expense



The **Custom Fields** tab shows the custom fields for a particular record. New custom fields can be created in the **Custom Fields** section of **Advanced Settings** in TO3000 3D+.

5.11. Creating clients

Clients in TO3000 3D+ are created on the Main tab of the Client window. To create a Client record, please follow the steps below:

1. Click the **New Client** button above the **Client** list on the **Client** window > **Main** tab.

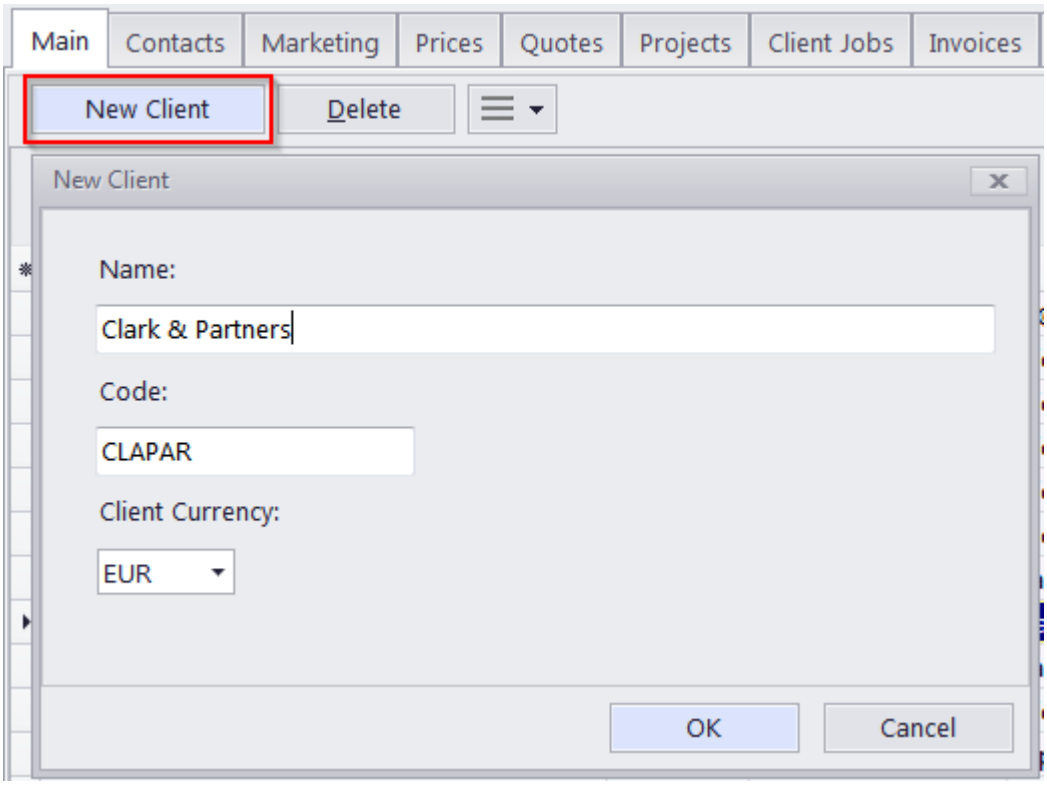
2. Fill the fields of the **New Client** window:

•Enter the name of the client in the **Name** text field.

•The code for the **Client** record will be generated automatically (usually contains the first letters of the **Name)** in the **Code** text field, but you can also edit it manually (12 symbols maximum).

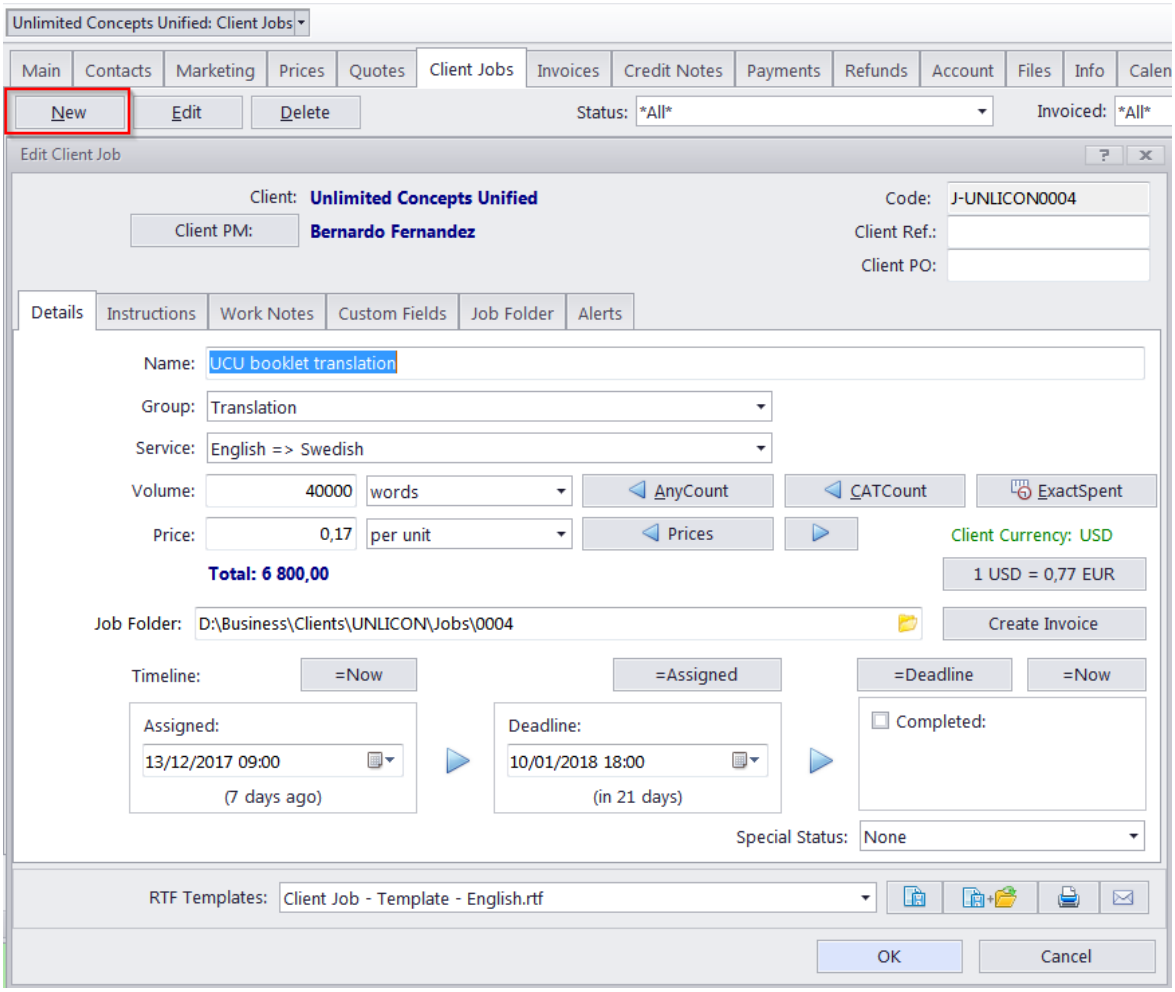
•Select the **Client Currency** using the corresponding drop–down list.

•Click **OK** to confirm or **Cancel** to discard the entered information.



5.12. Creating client jobs (Without Projects Mode only)

Client jobs can be created by clicking the **New** button of the **Client Jobs** tab of a *client*.



New/Edit Client Job window

Code - a unique code of the client job is created automatically along with the job itself. The first character "*J*" indicates that this is a job code, the letters afterwards are the client code, and the number is the value of the client job counter for this client. Each client has an independent code counter for this code.

Client Ref. - the client reference can be a maximum of 20 characters long.

Client PM - one of the client's contacts, responsible for this job on the client side. The Client PM's name can be automatically included in the invoice containing this job. By default it is the Client PM selected for the entire project. Client jobs of the same project can have different client PMs. See the Contacts List topic for details on adding and editing options for the Client PM field.

Name - the name of the client job will appear in invoices where this job is included (usually this is the name of the document being worked with). This name does not need to include the language pair or service name, since this data is being added separately.

Group - the group of services. All services in TO3000 3D+ are broken into groups. You can select any of the groups of services available. To add or edit a group of services please open **Business Settings** in the **Backstage** view, and select the Groups of Services section.

Service - each group of services contains a separate list of services. Before selecting a service, select the group of services first. To add or edit a service please open **Business Settings** in the **Backstage** view, and select the Services section.

Volume - the job's volume can be indicated in a number of units (characters, words, lines, hours and so on). To add custom units please open **Business Settings** in the **Backstage** view, and select the Volume Units section.

You can also use the built-in AnyCount or CATCount tools to quickly count the job file, or calculate CAT text volumes (100% match, fuzzy match, and so on). You can also import Trados and Logoport logs with the help of the CATCount tool to quickly enter the required volume. See the AnyCount and CATCount topics for details.

If you have ExactSpent installed, you can use it to track the time you spent performing this job, and automatically update this data in TO3000. See the topic Integration with ExactSpent for more details.

Price - the price can be entered manually or copied from the client's individual price-list. To copy a price from the price-list click the **Prices** button. The price for a matching service, group of services and unit combination will be copied. Click the button to copy the current price to this client's price list. You can set a fixed price for the client job (which will not be multiplied by the job volume) by selecting the **flat fee** option in the drop-down list next to the price field. Select the **free** option in the same drop-down list to set the job total to zero. The price and volume in a free job must not necessarily be zero.

If the client currency differs from your base currency, the **Currency Exchange Rate** button will be available. By clicking this button, you may change the *currency exchange rate* used in this *job*. Note that this button does not change the general exchange rate stored in your TO3000 database. To change the exchange rate for all future jobs go to the Exchange Rates tab of the Business Settings.

Job Folder - when creating client jobs it is often necessary to work with job files (for example you may need to count a client job file for exact volume). Once the folder has been created, its contents can quickly be accessed on the **Job Folder** tab of the **New/Edit Client Job** window.

Create Invoice button - immediately creates an invoice for the job being edited.

Timeline - the timeline of a client job in TO3000 3D+ includes assigned and deadline dates, and the date when the client job has been actually completed. The Deadline and Completed values are taken into account when the program determines the status of client jobs (like due today, overdue and so on).

Special Status - these are used when the client job needs to be put *on hold*, when you create a *heads-up* (or potential) job or to *cancel* a job. Jobs with *on hold* status have their deadlines undetermined, thus *on hold* jobs cannot become overdue. Jobs with *heads-up* status cannot be set as completed, since *heads-up* status assumes that work has not yet started. *Cancelled* jobs can not be completed either, since the status implies that the job was abandoned.

Instructions - any instructions or comments of the client regarding a client job can be entered here in the form of a plain text note.

Work Notes - work notes can be entered here. It is recommended to enter client notes and work notes separately.

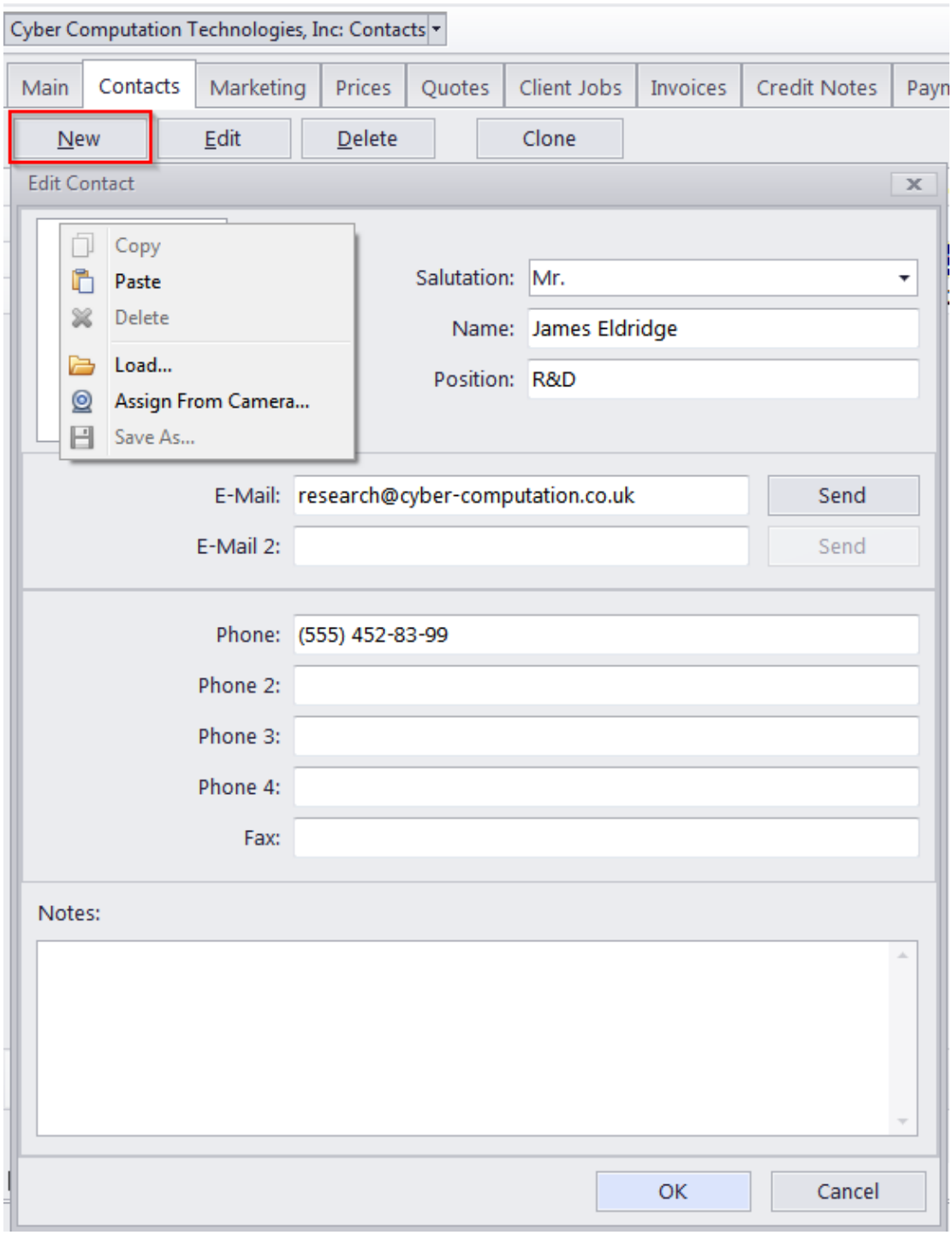
Custom Fields - client job information can be customized by adding custom fields for additional information not foreseen by default controls.

You can save client job data in a printable file, print it, or send it via Email with the help of the *RTF templates interface*.

Templates for printing job data can be edited with the help of **User Settings** in the **Backstage** view. Click the **Templates** section to quickly access all template folders. Templates for printing client jobs are saved in the *C:\Users\Public\Documents\AIT\TO3000, Version 3D\Templates\CLIENTS\Jobs* folder.

5.13. Creating contacts

To add or edit a contact person to a client's profile, click the **New/Edit** button on the **Contacts** tab of the **Client** window.



The following data can be added to a *Contact* profile:

Photo – up to 110x120 pixels. Click **Load, Paste** or **Assign from camera** to add a photo to the contact's profile. Click **Delete** to remove the current photo from the profile.

Salutation – select one of the salutations, entered via the Advanced Settings section of TO3000 3D+. This salutation can then be automatically displayed on all printable documents next to this contact's name.

Name – maximum 80 characters.

Position – maximum 40 characters. Like the salutation, the position will also be automatically displayed on printable documents.

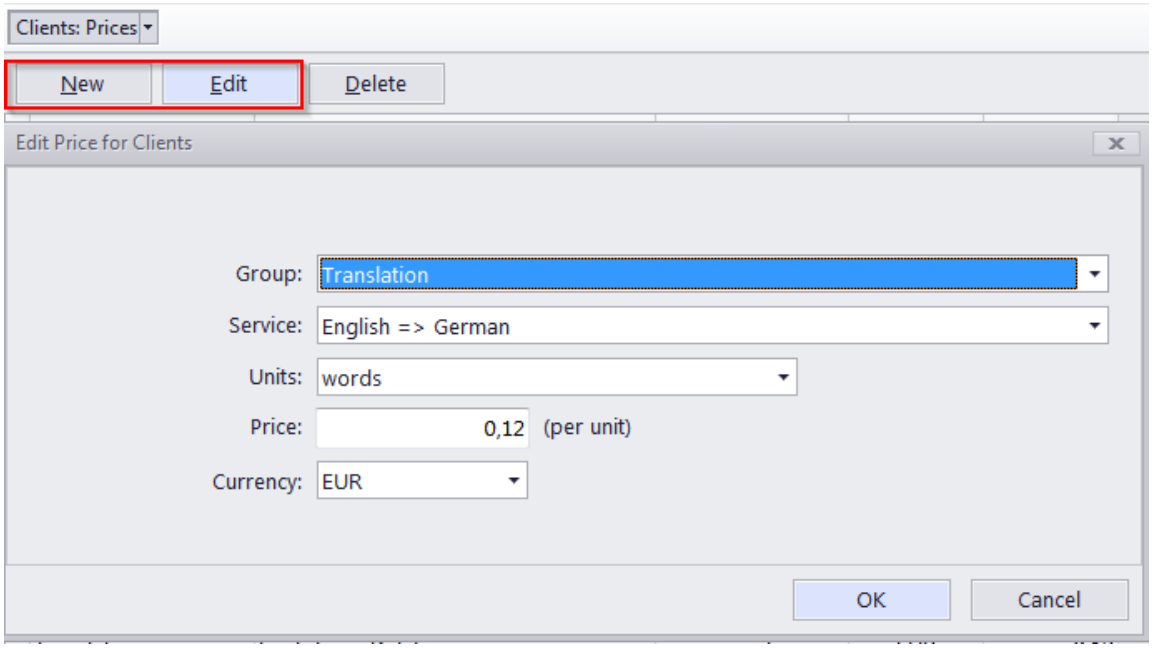
E–mail (up to 2) – maximum 150 characters. The **Send** button becomes active only if a valid e–mail address is entered.

Phone (up to 4) and **Fax** numbers – maximum 150 characters each.

Notes – a plain text note with no maximum length.

5.14. Creating client prices

To add or edit a price, click the **New/Edit** button on the **Prices** tab of the **Client** window to create/edit an individual price, or in the **Prices for Clients** window to create/edit a general price.



Client price in TO3000 3D+ has the following parameters:
Group - you can select any of the groups of services available. To add or edit a group of services please open **Business Settings** in the **Backstage** view, and select the Groups of Services section.
Service - each group of services contains a separate list of services. Before selecting a service, select the group of services first. To add or edit a service please open **Business Settings** in the **Backstage** view, and select the Services section.

Units - prices in TO3000 3D+ are quoted per certain units. A price can only be applied to a Client Job with its volume in the same units. To add custom units please open **Business Settings** in the **Backstage** view, and select the Volume Units section.
Price (per unit) - Enter the default fee per selected unit.
Currency - Select the currency. This option is locked to the Client's currency when creating/editing an individual price. To add currencies to the list please open **Business Settings** in the **Backstage** view, and select the Currencies section. To configure the exchange rate between your base currency and other currencies open **Business Settings** in the **Backstage** view, and select the Exchange Rates section.

5.15. Copying client prices from general prices

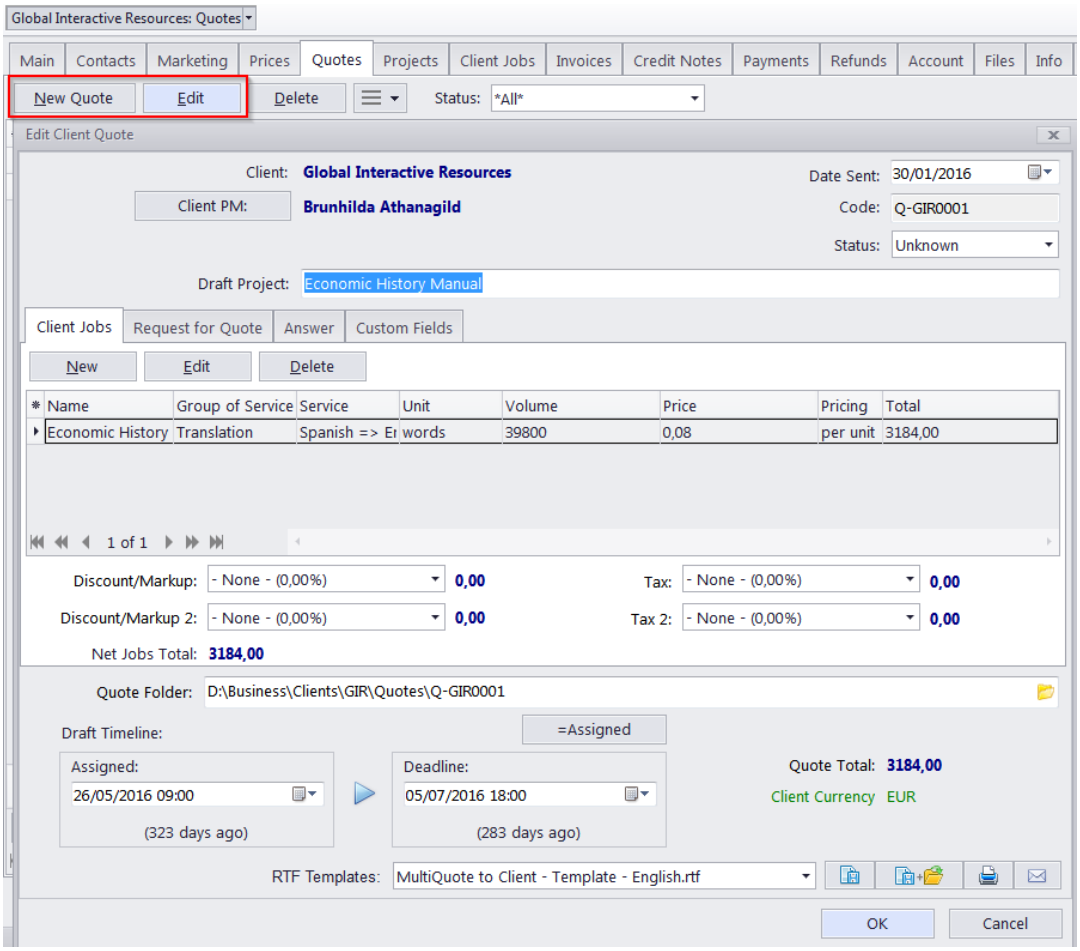
Prices from the general price list can be copied to an individual client's price list.

Click **Copy Prices** to transfer the currently selected price(s) (use CTRL/SHIFT + left-click to select multiple prices) in the lower list.

If the same price (with the same Service, Group of Services and units) already exists in this client's price list, TO3000 3D+ will prompt you to replace the price in the individual client's price list with the one being copied from the general price list.

5.16. Creating quotes to clients

All quote information can be added or changed in the **Edit Quote** window. To open this window for a quote double-click this quote in the list. To create a new quote, click the **New Quote** button.



Client PM - select one of the client's contacts as the project manager for this draft project (on the client's side). Please see the Contacts topic for details.

Date sent - apart from reference purposes, this date will also be used by the *Global Date filter*. Please see the Global Date Filter topic for details.

Code - the code of the quote is generated automatically. In this code the "*Q*" character means that this is a quote, the letters afterwards represent the code of the client and the number is the value of the quote counter for this client. Each client has an independent code counter for quotes.

NOTE: Although the quote code cannot be edited directly, the quote counter can be advanced forward by assigning a higher next code value in the client's profile. Please see the Next Client Codes topic for details.

Status - the settings in this drop-down list determine the color in which the quote will be shown on the Quotes tab of the Client window or on the Client Quotes window.

Draft Project - the name of the quote. This will also become the name of a project created based on this quote. A draft project name can contain 100 characters maximum.

Client Jobs - lists the draft client jobs of this quote. Use the Customize columns option to configure which data should be displayed. Please see the Draft Client Job topic for more details.

If the client's currency differs from your base currency, the **Currency Exchange Rate** button will be available. By clicking this button, you may change the *currency exchange rate* used in this *quote*. Note that this button does not change the general exchange rate stored in your TO3000 database. To change exchange rate for all future credit notes, go to the Exchange Rates tab of the Business Settings.

Request for Quote, **Answer** - enter a plain text note here.

Quote folder - quote folders are created in the Quotes folder located inside each client's folder. The quote code is used in naming the quote folder. Click the Folder button on the right side of the field to open the folder in TO3000 Explorer (creating it if it does not exist yet).

Draft Timeline - like a regular project, a quote has assigned and deadline dates.

Custom Fields - quotes can also contain custom data (for example custom statuses, dates or notes) added in the form of custom fields. If you have any custom fields in quotes to clients, their controls can be found on the **Custom Fields** tab. For more information on adding custom fields, please see the Custom Fields topic.

Saving / printing / Emailing Client Quotes

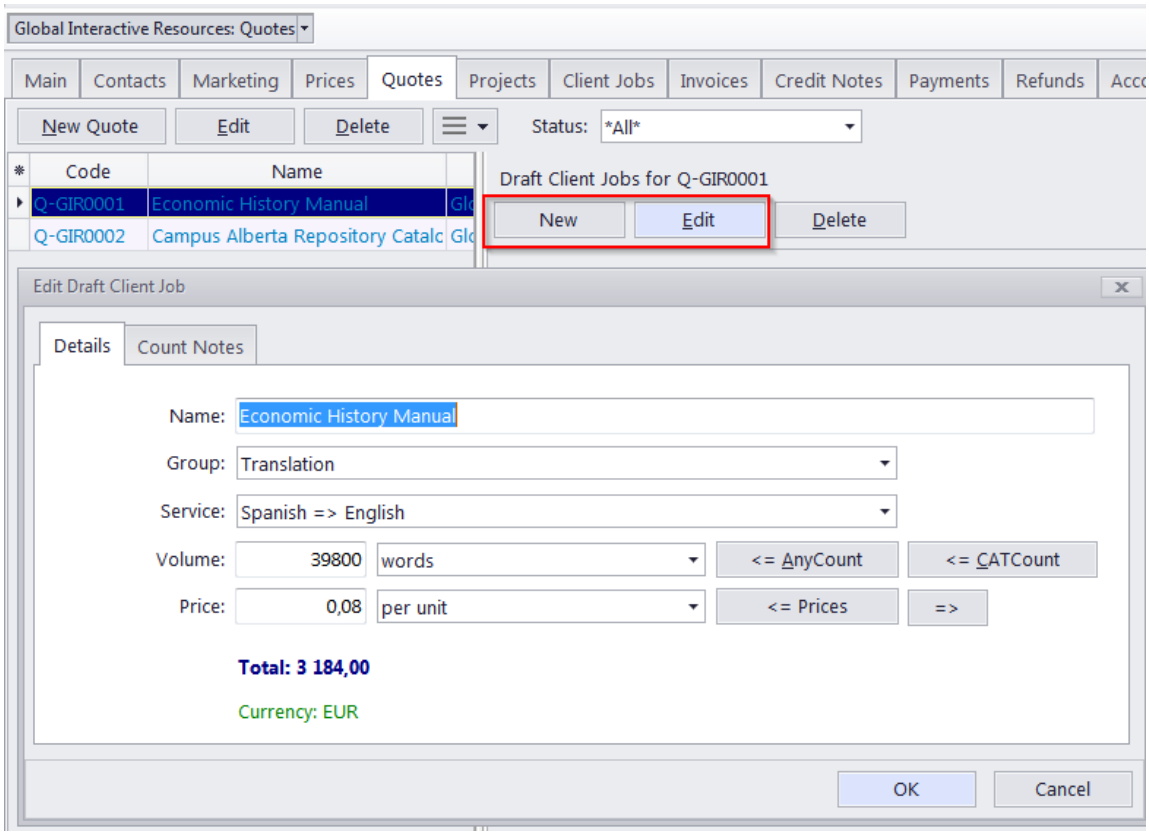
You can print quotes or save them in text files by selecting an RTF template and clicking the **Save**, **Save and Open** or **Print** buttons at the bottom of the window. Click **Send Mail** to open the Mail Sender for the generated quote.

NOTE: You can choose to save the output file in *PDF* or *DOC* formats by selecting this format in the **Save As** window with the help of the **Save as type** drop–down list.

To edit templates for quotes click User Settings in the Backstage view and select **Templates**. **Templates** for Client Quotes are located in the *C:\Users\Public\Documents\AIT\TO3000 3D+\Templates\CLIENTS\Quotes* folder.

5.17. Draft client Job

There are two ways of adding or editing draft client jobs: either in the **Edit Quote** window of the required quote, or by selecting the quote and managing its Draft Client Jobs in the table on the right side of the **Quotes** tab or window.



A Draft Client Job contains the following data:

Name - maximum 100 characters long.

Group of services - you can select any of the groups of services available. To add or edit a group of services please open Business Settings in the Backstage view, and select the Groups of Services section.

Service - each group of services contains a separate list of services. Before selecting a service, select the group of services first. To add or edit a service please open Business Settings in the Backstage view, and select the Services section.

Volume - when entering the volume being quoted, you can either use the volumes specified by the client, or count the client's file with the built-in AnyCount. CAT analysis can also be used to determine the draft job's volume. To count a file, click the **<=AnyCount** button. To enter a CAT analysis or load a Trados or Logoport log, click the **<=CATCount** button. Please refer to the AnyCount, and CATCount topics for details.

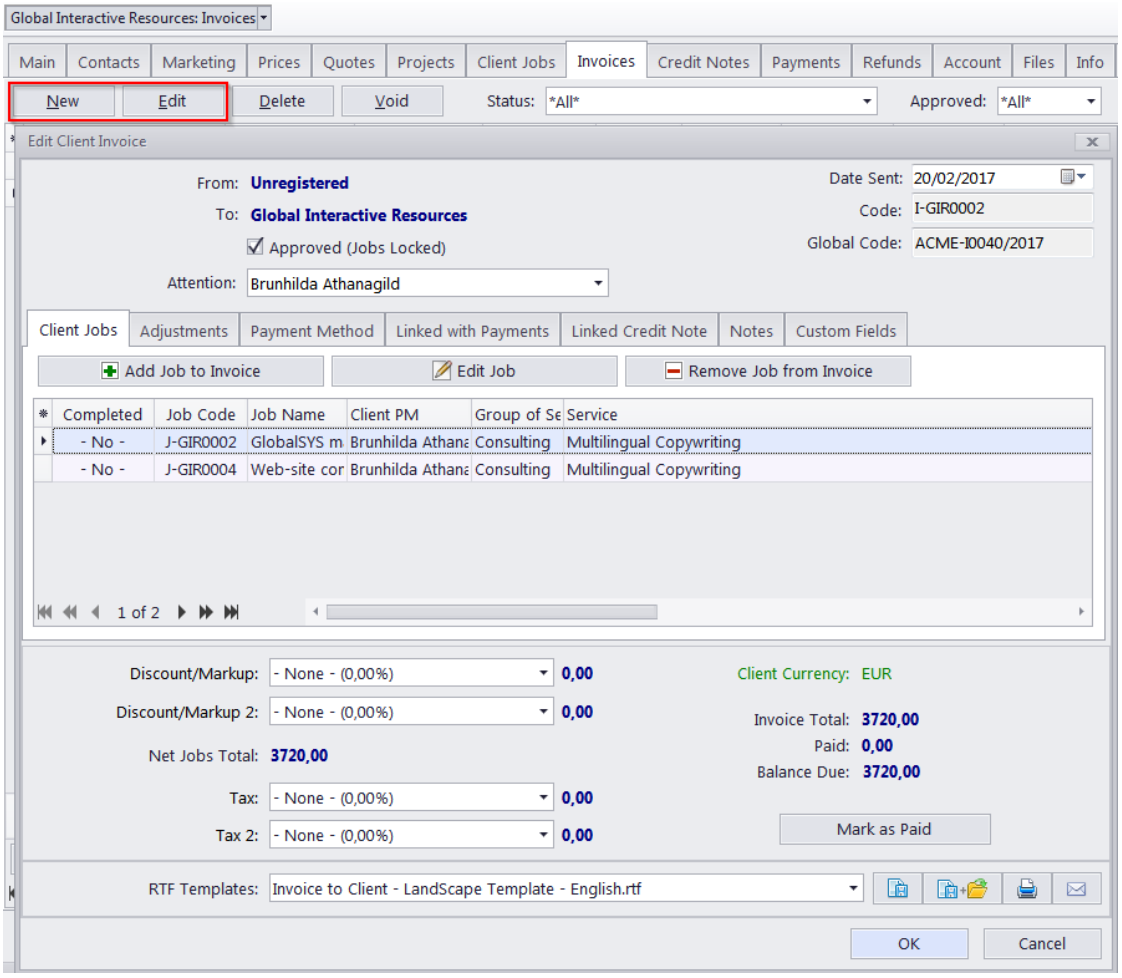
NOTE: Please make sure that correct volume units have been set before using AnyCount or CATCount options. Jobs in such volume units as hours, for example, cannot be counted with AnyCount.

Price - the price value can be either entered manually or copied from the client's individual price-list. Click the **<=Prices** button to copy the price from client's price list. Click the **=>** button to add this price to the client's price-list.

5.18. Creating invoices to clients

Invoices can be created on the Invoices tab of the Client window.

Note: Alternatively, invoices can be created by clicking the **Mass Invoicing** button on the **Invoices to Clients** window. For more information please refer to the Mass Action topic. Invoices for specific jobs can also be created in the **Edit Client Job** window by clicking the **Create Invoice** button.



New/Edit Invoice window

All invoice information can be added or changed in the **New/Edit Invoice** window. To open this window for the selected invoice, click **New/Edit** or double-click this invoice in the list.

Approved - by approving the invoice, you can prevent the changing of Client Job data in the jobs added to this invoice.

Date Sent - this date is considered to be the invoice's issue date (no matter when the invoice has actually been created) when applying payment terms. See the Payment Terms of Client topic for details.

Code - also called the "Client-specific" code, generated automatically. The "/" character means that this is an invoice, letters afterwards represent the code of the client and the number is the value of the invoice counter for this client. Each client has an independent counter for this code.

Global Code - the global code is generated automatically. The global invoice code's layout can be configured in the Codes section of the **Advanced Settings** window. The non-configurable portion of the code (digits) represent the global invoice counter.

Attention - select one of the Client's contacts for this field. Their name will be displayed in the resulting invoice document. Please see the Contacts List topic for details.

Client Jobs - lists the client jobs ("items") of this invoice. Use the Customize columns option to configure which data should be displayed.

Mark as Paid button - allows you to quickly create a payment according to the total of the invoice and automatically link it up.

Adjustments - adjustments are added to invoice totals. Discounts and taxes are not applied to adjustments.

Payment Method - you can add payment details (banking, credit card number, PayPal account and so on) to your invoice in the form of payment methods. To configure payment methods click Business Settings in the Backstage view and select the **Payment Methods** section. See the Payment Methods topic for details on how to add or edit options on this tab.

Linked with Payments - unless the full amount of the invoice is linked with payments, the status of this invoice will remain outstanding. On this tab you can check if the invoice has been linked with payments. Payments can be linked to invoices from the **Edit Payment** window only.

Also, **Phantom Payments** can be created on the **Linked with Payments** tab. These are used to balance disregarded parts of invoices, which keep **Invoices** with *Outstanding* status, and make them *Settled*.

Linked Credit Note - This tab displays information on the credit notes linked to this invoice. Credit notes are linked to invoices during creation.

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

Notes - any additional notes which your invoice must include, can be added on this tab.

Discount/Markup - invoices can have up to 2 discounts and markups. These are applied as positive (markup) or negative (discount) percentages to the invoice subtotal. To configure discounts and markups click Business Settings in the **Backstage** view and select the

Discounts/Markups section. For more information on adding or editing discounts and markups please see the Discounts/Markups topic.

Tax - each invoice can have up to 2 taxes. Taxes are applied as percentages to invoice subtotals plus discounts/markups. To configure taxes click Business Settings in the **Backstage** view and select the **Taxes** section. For more information on adding or editing discounts and markups please see the Taxes topic.

If the client's currency differs from your base currency, the **Currency Exchange Rate** button will be available. By clicking this button, you may change the *currency exchange rate* used in this *invoice*. Note that this button does not change the general exchange rate stored in your TO3000 database. To change exchange rate for all future credit notes, go to the Exchange Rates tab of the Business Settings.

Saving and printing Invoices

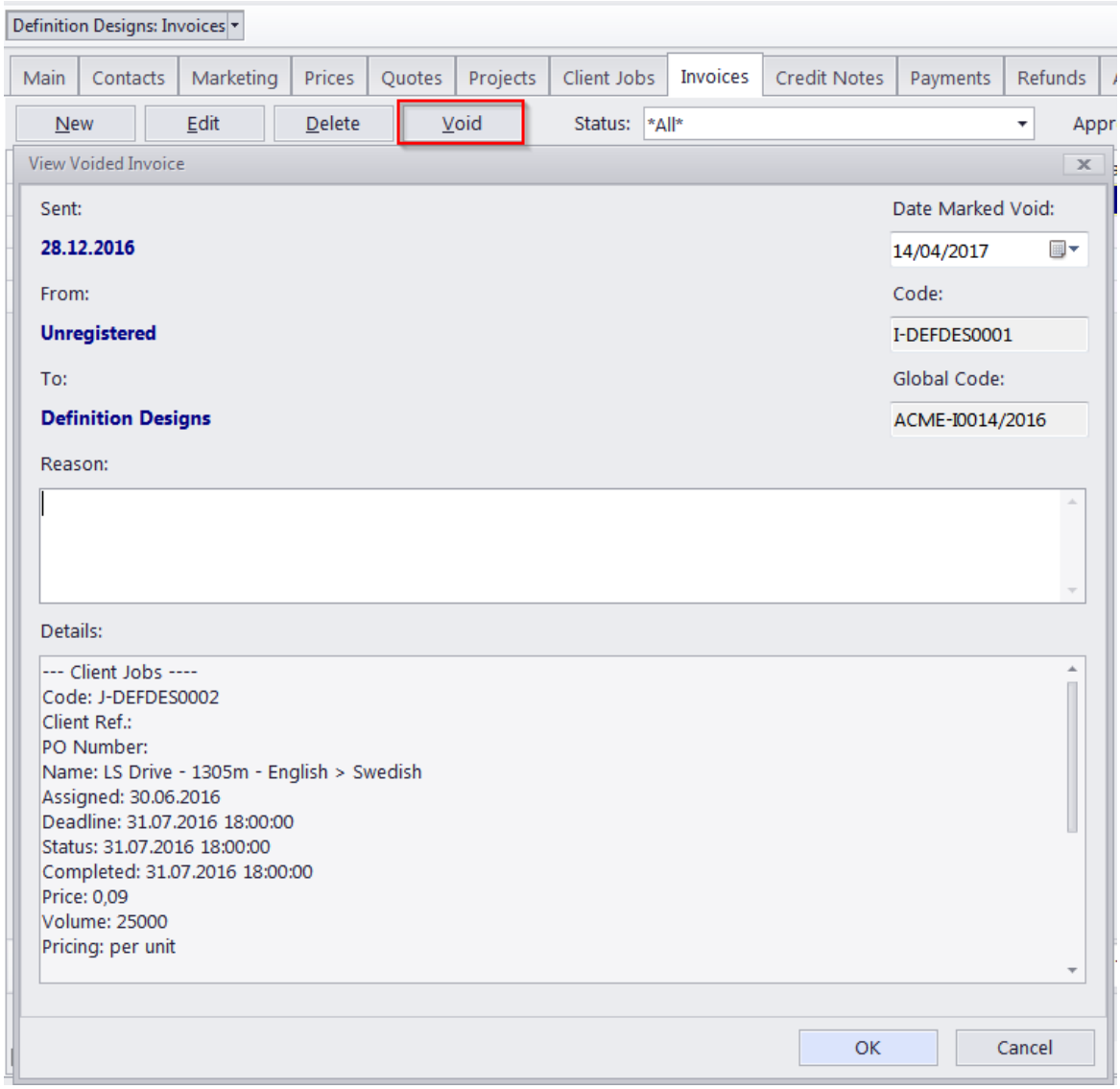
You can print invoices or save them in text files by selecting an RTF template and clicking the **Save**, **Save and Open** or **Print** buttons at the bottom of the window. Click **Send Mail** to open the Mail Sender for the generated invoice.

NOTE: You can choose to save the output file in *PDF* or *DOC* format by selecting this format in the **Save As** window with the help of the **Save as type** drop–down list.

To edit templates for invoices click User Settings in the **Backstage** view and select **Templates**. **Templates** for invoices are located in the *C:\Users\Public\Documents\AIT\TO3000, Version 3D\Templates\CLIENTS\Invoices*\ folder

5.18.1. Void invoices

To void an invoice, select it in a client's **Invoices** tab and click **Void**.



By *voiding* an invoice, you do not delete it from your invoices list. However, once voided, the invoice cannot be printed or edited, and the jobs added to this invoice revert to Uninvoiced status.

When voiding an invoice you can enter the reason for voiding, and specify the date (will be used by Global Date Filter).

The details of a void invoice are kept in the database as a plain text note for future reference. The following data will be preserved in a void invoice:

- *Client Jobs*: Code, Client Ref., PO Number, Name, Assigned, Deadline, Completed, Price, Volume, Exchange Rate: Total

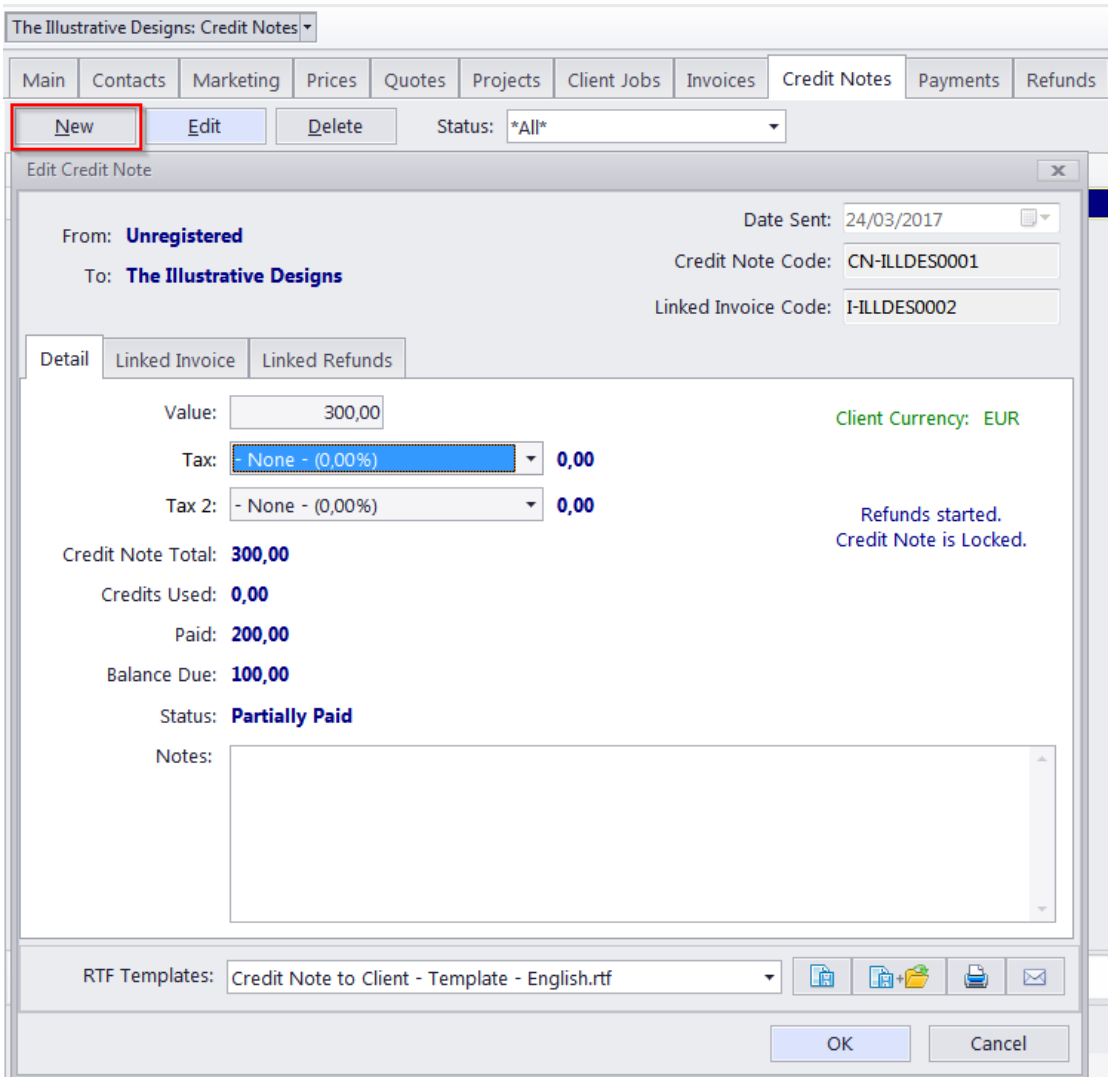
- *Discounts*

- *Taxes*

An invoice cannot be voided if it has linked payments. Void invoices are displayed in all invoice lists.

5.19. Creating credit notes

New Credit notes are created by pressing the **New** button in the **Credit Notes** tab of the **Client** window. You will be prompted to select an invoice the Credit note will be linked to before the **New Credit Note** window is opened.



The **New/Edit Credit Note** window contains the following data:

Date Sent — this date is considered the credit note's issue date (no matter when the credit note has actually been created).

Credit Note Code — a credit note ID number, generated automatically. "CN" characters mean that this is a credit note, the letters afterwards represent the code of the client and the number is

the value of the credit note counter for this client. Each client has an independent counter for this code.

Linked Invoice Code — the code of the invoice linked to this credit note during creation.

Value — the total value of the credit note in the client's currency. TO3000 will calculate the equivalent in your base currency according to the exchange rates.

Notes — any additional notes which your credit note must include, can be added on this field. These notes can be automatically added to the printed credit note.

Tax — each credit note can have up to 2 taxes. Taxes are applied as percentages to the credit note subtotals. To configure taxes, in the Backstage view click **Business Settings** and select the **Taxes** section.

NOTE: After a tax has been selected for a credit note of some client, this tax will be remembered and applied as the default tax for the client. All next credit notes will include this tax. The default tax can be changed in any time by choosing another value during credit note creation.

If the client's currency differs from your base currency, the **Currency Exchange Rate** button will be available. By clicking this button, you may change the *currency exchange rate* used in this *credit note*. Note that this button does not change the general exchange rate stored in your TO3000 database. To change exchange rate for all future credit notes, go to the Exchange Rates tab of the Business Settings.

Linked Invoice — displays the basic information of the invoice linked to this credit note.

Linked Refunds — on this tab you can check whether this credit note has been linked with refunds. Refunds can be linked to credit notes from the **Edit Refund** window only.

Saving / printing / e-mailing Credit Notes

To print, save or e-mail an **Credit Note** as an RTF document, use the RTF template controls near the bottom of the **New/Edit** window.

Use the **RTF Templates** drop-down list to select the template which must be used for printing, saving or e-mailing this credit note as an RTF file. Click the **Save**, **Save & Open, Print,** or **Send Mail** button to save, print, or e-mail the **Credit Note**.

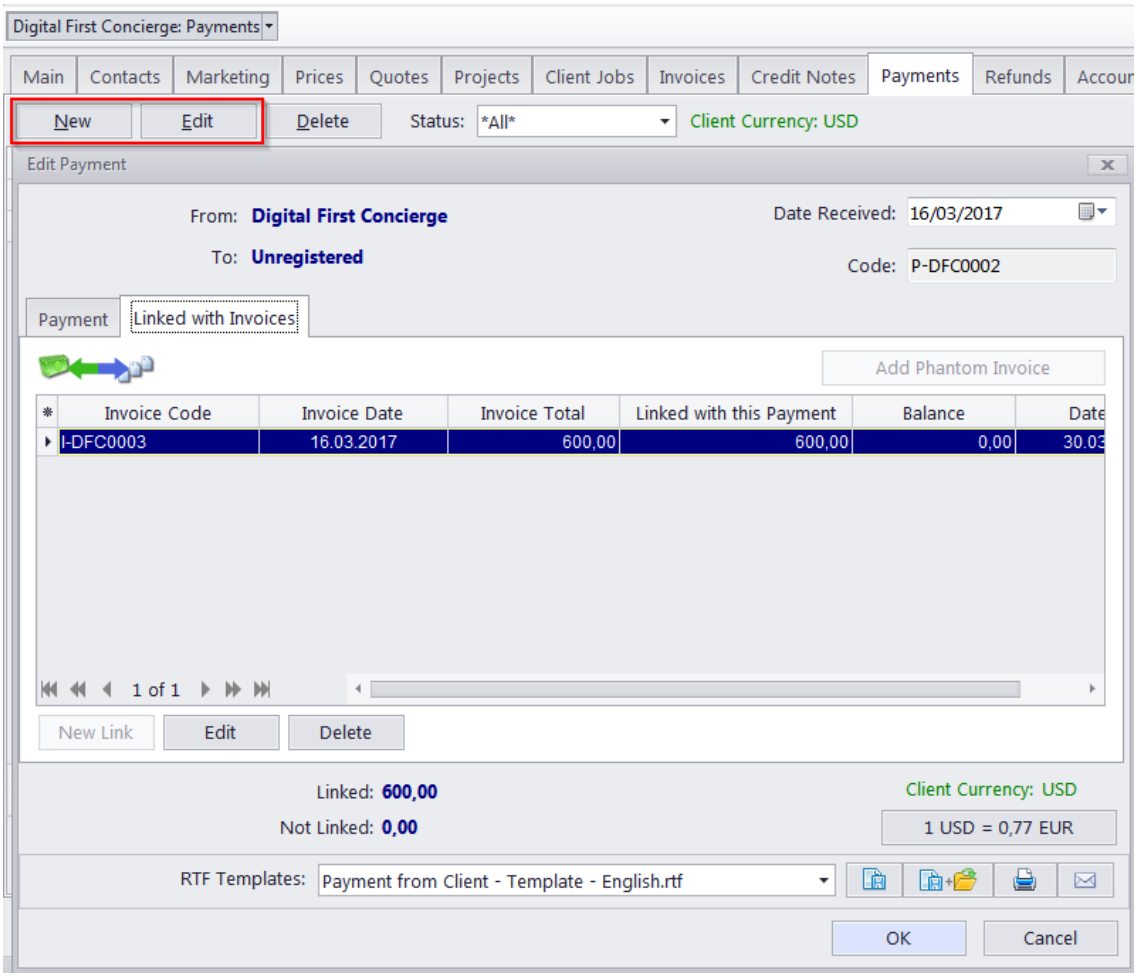
NOTE: You can choose to save the output file in RTF, DOC or PDF format by selecting this format in the Save As window with the help of the Save as type drop-down list.

To edit templates for credit notes, in the **Backstage** view click **Business Settings** and select **Templates**. Templates for credit notes are located in the *C:\Business\CLIENTS\Credit Notes* folder.

5.20. Creating payments

New Payments are created by pressing the **New** button in the **Payments** tab of the **Client** window.

Note: Alternatively payments can be created by clicking the **Mass Payment** button on the **Payments to Clients** window. For more information please refer to Mass Action topic. Payments for specific invoices can also be created in the **Edit Invoice** window by clicking the **Mark as paid** button.



Payment from client contains the following data:

Date Received - apart from reference purposes, this date will also be used by the *Global Date filter*. Please see the Global Date Filter topic for details.

Code - payment code is generated automatically. In this code the "*P*" character means that this is a payment, the letters afterwards represent the code of the client and the number is the value of the payments counter for this client. Each client has an independent code counter for payments.

Volume - the total amount of the payment in the Client's currency. TO3000 3D+ will calculate your revenues in your base currency according to the exchange rates. See the Exchange Rates topic for details.

Notes - any additional information deemed necessary. For example if this is an advance payment for a future project.

If the client's currency differs from your base currency, the **Currency Exchange Rate** button will be available. By clicking this button, you may change the *currency exchange rate* used in this *payment*. Note that this button does not change the general exchange rate stored in your TO3000 database. To change exchange rate for all future credit notes, go to the Exchange Rates tab of the Business Settings.

Linked with Invoices - the payment's value can be linked with invoices - fully or partially. The table on the **Linked with Invoices** tab indicates how much is linked to which invoice.

Phantom invoices are virtual invoices which can be used to make the payment linked, without settling any actual invoices. Phantom invoices can be used for ensuring account consistency in case the payment for some reason should not be used to cover invoices.

Saving and printing Payments to Client

You can print payments or save them in text files by selecting an RTF template and clicking the **Save**, **Save and Open** or **Print** buttons at the bottom of the window. Click **Send Mail** to open the Mail Sender for the generated payment.

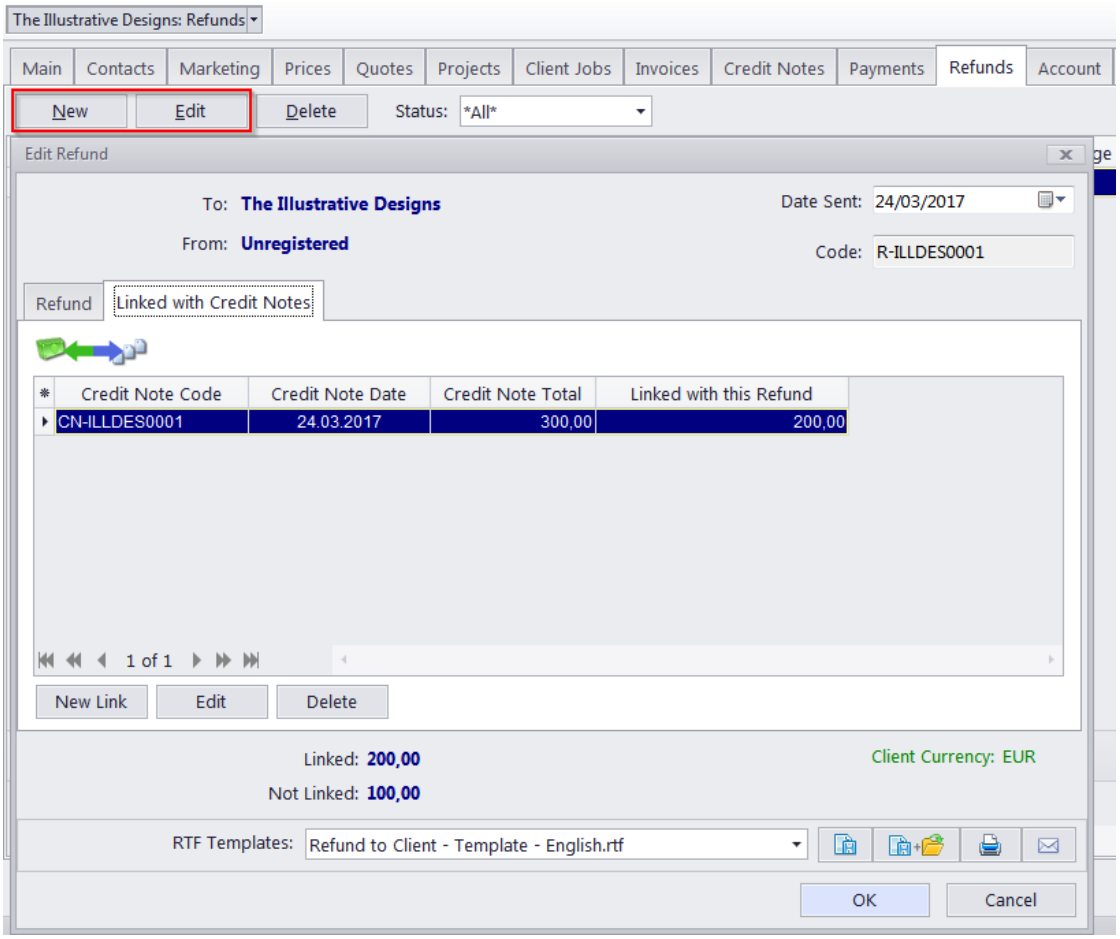
NOTE: You can choose to save the output file in *PDF* or *DOC* format by selecting this format in the **Save As** window with the help of the **Save as type** drop–down list.

To edit templates for payments click User Settings in the Backstage view and select **Templates**. **Templates** for payments to clients are located in the *C:\Users\Public\Documents\AIT\TO3000, Version 3D\Templates\CLIENTS\Payments* folder.

5.21. Creating refunds

New refunds are created by pressing the New button in the Refunds tab of the Client window.

Note: A refund for a specific credit note can also be created in the **Edit Credit note** window by clicking the **Mark as paid** button.



New/Edit Refund window contains the following data:

Date Received — part from reference purposes, this date will also be used by Global Date filter.

Code — the refund code is generated automatically. In this code the "R" character means that this is a refund, the letters afterwards represent code of the client, and the number is the value of the refunds counter for this client. Each client has an independent code counter for refunds.

Value — the total amount of the refund in the client's currency. TO3000 will calculate your revenues in your base currency according to the exchange rates.

If the client's currency differs from your base currency, the **Currency Exchange Rate** button will be available. By clicking this button, you may change the *currency exchange rate* used in this *refund*. Note that this button does not change the general exchange rate stored in your TO3000

database. To change the exchange rate for all future refunds, go to the **Exchange Rates** tab of the **Business Settings**.

Notes — any additional information can be entered here.

Linked with Credit Notes — the refund's value can be linked with credit notes — fully or partially. The table on the **Linked with Credit Notes** tab indicates which amount is linked to which credit note

Saving / Printing / E-mailing refunds

To print, save or E-mail a **Refund** as a text document, use the RTF template controls near the bottom of the **New/Edit** window.

Use the **RTF Templates** drop-down list to select the template which should be used for printing, saving or e-mailing this refund as an RTF file. Click the **Save**, **Save & Open, Print,** or **Send Mail** button to save, print, or e-mail the Refund.

NOTE: You can choose to save the output file in RTF, DOC or PDF format by selecting this format in the Save As window with the help of the Save as type drop-down list.

To edit templates for refunds, in the **Backstage** view click **Business Settings** and select **Templates**. **Templates** for refunds are located in *C:\Users\Public\Documents\AIT\TO3000, Version 3D\Templates\CLIENTS\Refunds*\.

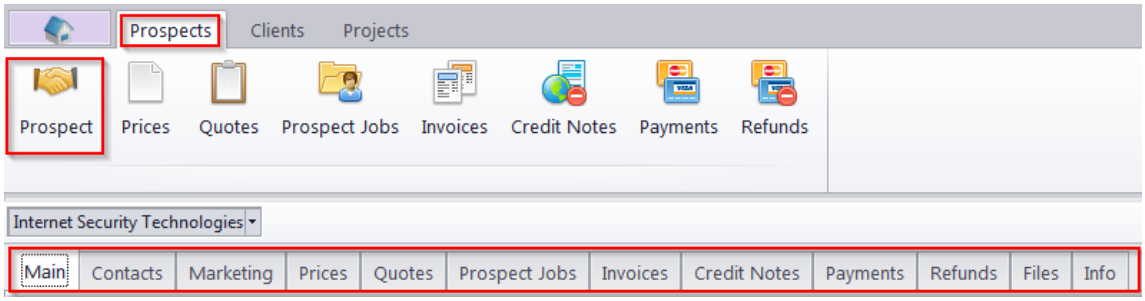
6. Prospects

6.1. Prospect Window

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

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

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



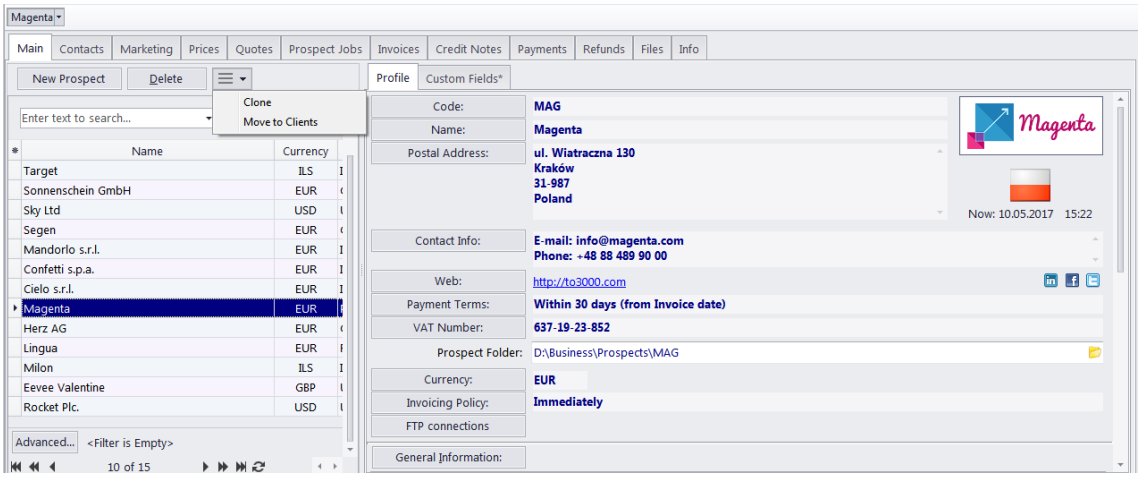
Prospect Window tabs

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

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

6.1.1. The Main tab

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



Browsing prospects

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

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

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

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

Once you strike a deal with a prospect and they become a full client you can transfer them into the Client database. Click the **More...** button and select "**Move to Client**".

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

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

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

NOTE: Due to filter operations (like the *local custom filter* and *global date filter*) you may not be able to see all the prospects in the database. Please refer to the Local Custom Filter topic for more details on filters and access restrictions.

Prospect profile

On the right side of the **Main** prospect tab, you have two tabs: **Prospect Profile** and **Custom**, which enable you to review and modify the prospect's information. Click appropriate button to add or edit prospect profile information:

•**Code** — click this button to enter or change the prospect's code (15 characters maximum). This is the same code, which had been assigned, manually or automatically, when creating the new prospect record. This code is also used for naming prospect folders as well as in codes for quotes. You can also load the prospect's logo here. It will be displayed above their country's flag.

•**Name** — click this button to edit this prospect's name. This name can be up to 150 characters long.

•**Postal Address** — click this button to add or change the postal address of the prospect. See the Postal Address of Prospect topic for details.

•**Contact Info** button — allows you to add or change the contact information of the prospect. See the General Contact Information topic for more details.

•**Web** — opens the **Edit Web Links** dialog box, providing fields to enter your prospect'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 prospect, and their minimum fees once the prospect is converted into a full client. See the Payment Terms of Prospect topic for more details.

• **VAT Number** — enter the prospect's legal tax number to have it automatically displayed and printed on invoices.

•**Prospect Folder** — this part of prospect's profile can be used to store and access the prospect files. Click the Folder button on the right side of the field to open the folder in the TO3000 Explorer (creating it if it does not exist yet).

•**Prospect Currency** — this currency will be used to issue quotes to this prospect. All the financial records for this prospect are kept in both your base currency and the prospect's currency, converted according to the exchange rates you set.

•**Invoicing Policy** — by adjusting the invoicing policy you determine the conditions upon which TO3000 3D+ will prompt you to invoice jobs once the prospect is converted into a full client. See the Invoicing Policy of Prospect topic for more details.

•**General Information** — any additional information which did not fit into any of the other sections can be entered here.

•**FTP connections** — you can set the parameters for access to the prospect's FTP folders. Shortcuts to these folders will be automatically added to the **Files** tab in this prospect's window. See the Prospect FTP Connections topic for details.

Custom data

The prospect database can be customized by adding custom fields. Any custom fields that have been added to the prospects database, can be accessed by clicking **Custom Fields tab**, next to the **Prospect Profile** tab.

Postal address of prospect

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

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

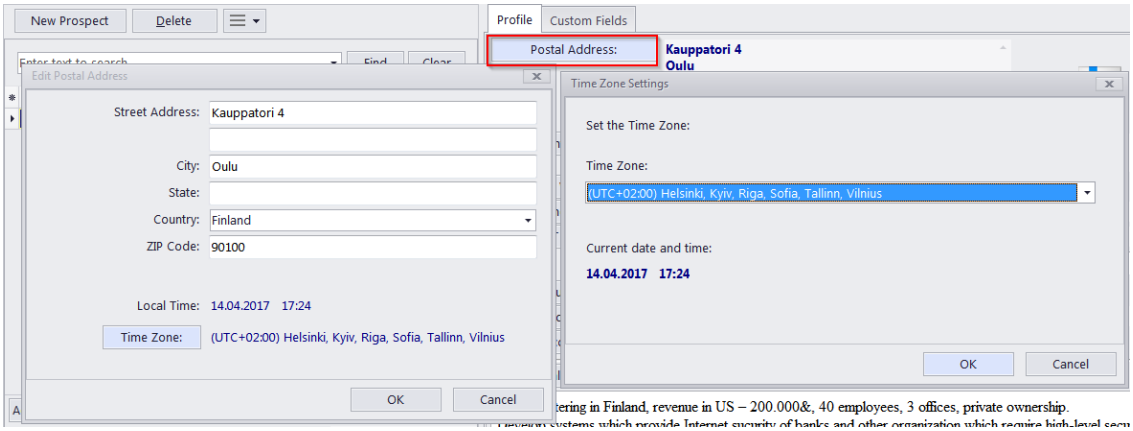
City — maximum 40 characters long.

State — maximum 40 characters long.

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

ZIP Code — maximum 10 characters long.

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



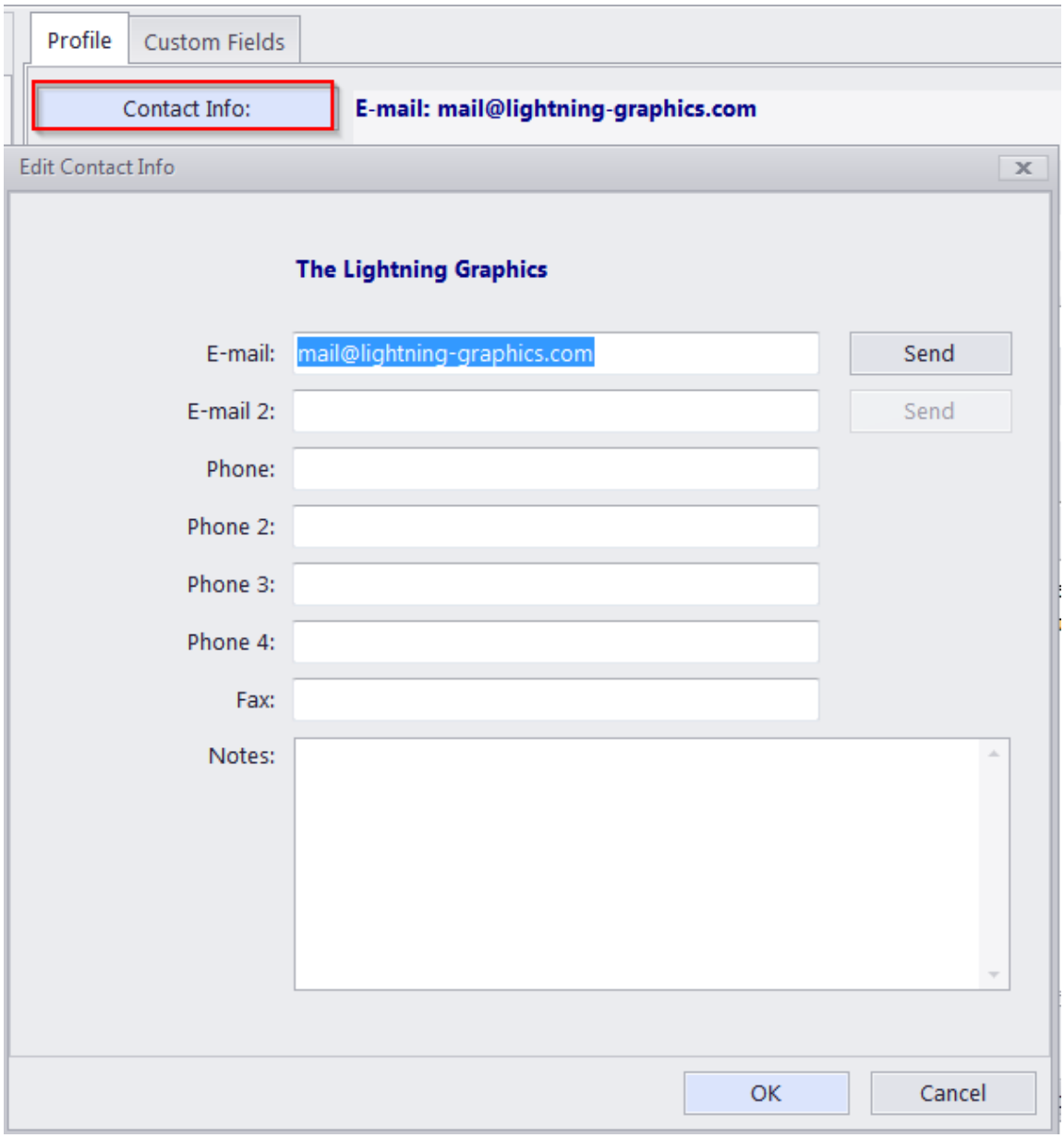
General Contact Information

Prospects in TO3000 have two types of contact information: general contact information (usually of a company rather than a person) and the contact information of the contact information of prospect's contact persons (Contacts). General contact information of a prospect can contain the following data:

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

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

Notes — a plain text note, with no maximum length.

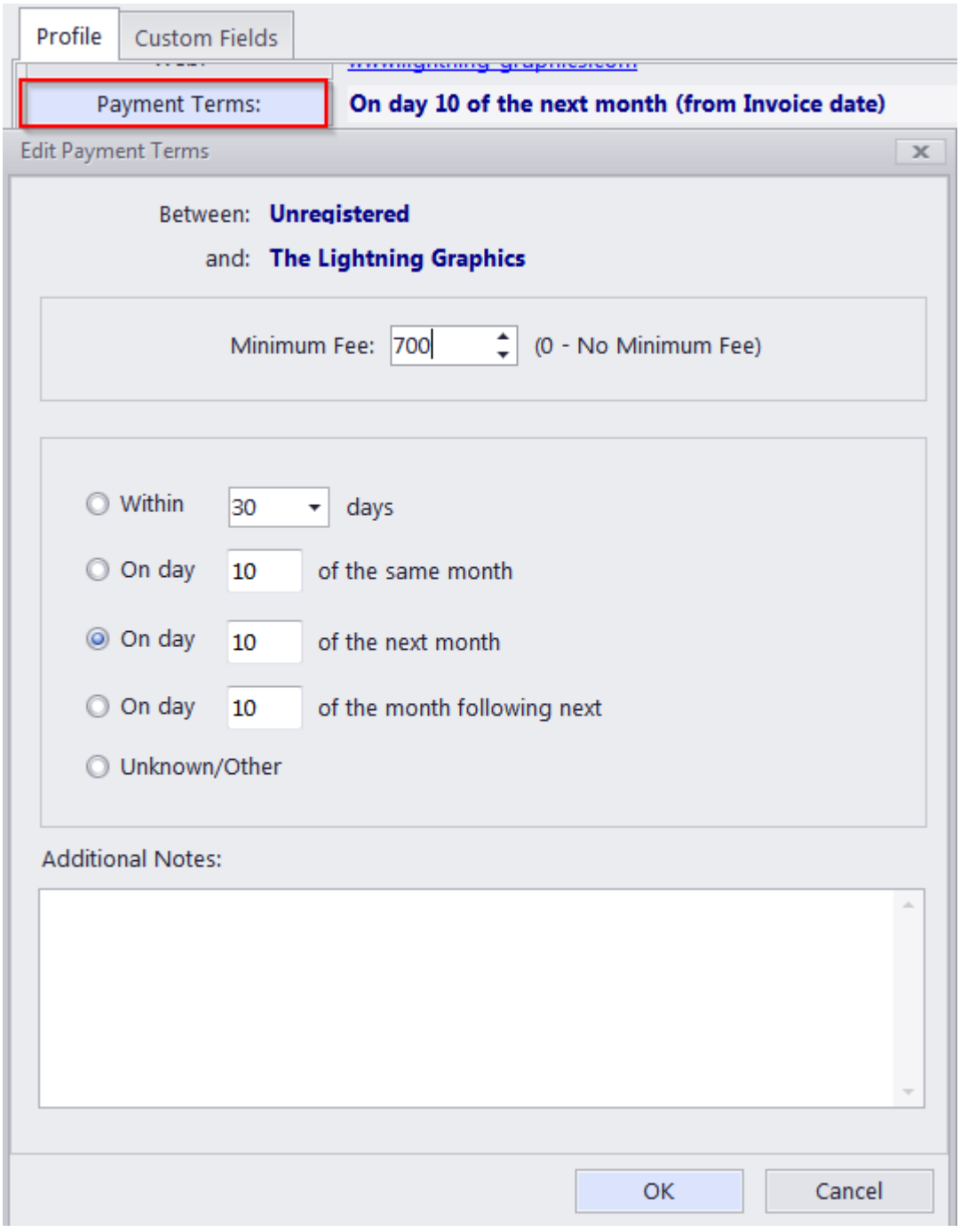


Payment terms of prospect

According to the payment terms of a prospect, TO3000 will keep track of unpaid invoices and update the status of outstanding invoices once the prospect is converted into a full client: overdue, due today, due tomorrow, and so on.

This information is also stored when a former or inactive client is converted into a prospect.

For more information, see Payment terms of client

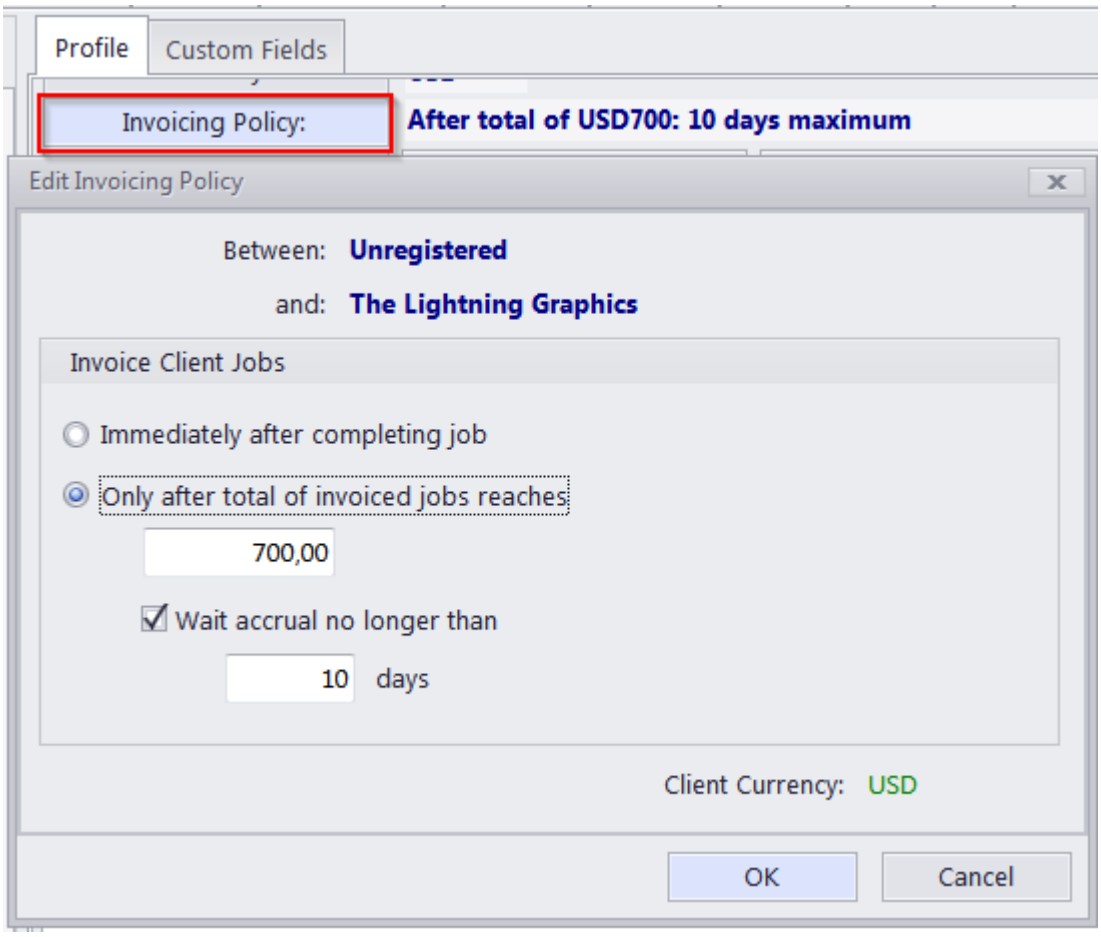


Invoicong policy of prospect

Invoicing policy settings determine when TO3000 3D+ alerts user to invoice jobs once the prospect is converted in to a full client. This information is also stored when a former or inactive client is converted into a prospect.

For more information, see Invoicing policy of Client

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



Prospect FTP connections

FTP (File Transfer Protocol) is a common method of sharing and exchanging work files. Each prospect profile in TO3000 can have a number of FTP connections (addresses of shared folders) associated with it. These folders can then quickly be accessed by any user working with the Files tab of this Prospect.

The *FTP Connection* interface in TO3000 allows for quick access to the specified FTP folder without having to re-type the login and password each time you connect. The following details can be specified when creating a connection:

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

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

User Name — the login, normally issued by the FTP server administrator. This login will be used when TO3000 attempts to connect to the FTP folder. Can be no longer than 50 characters.

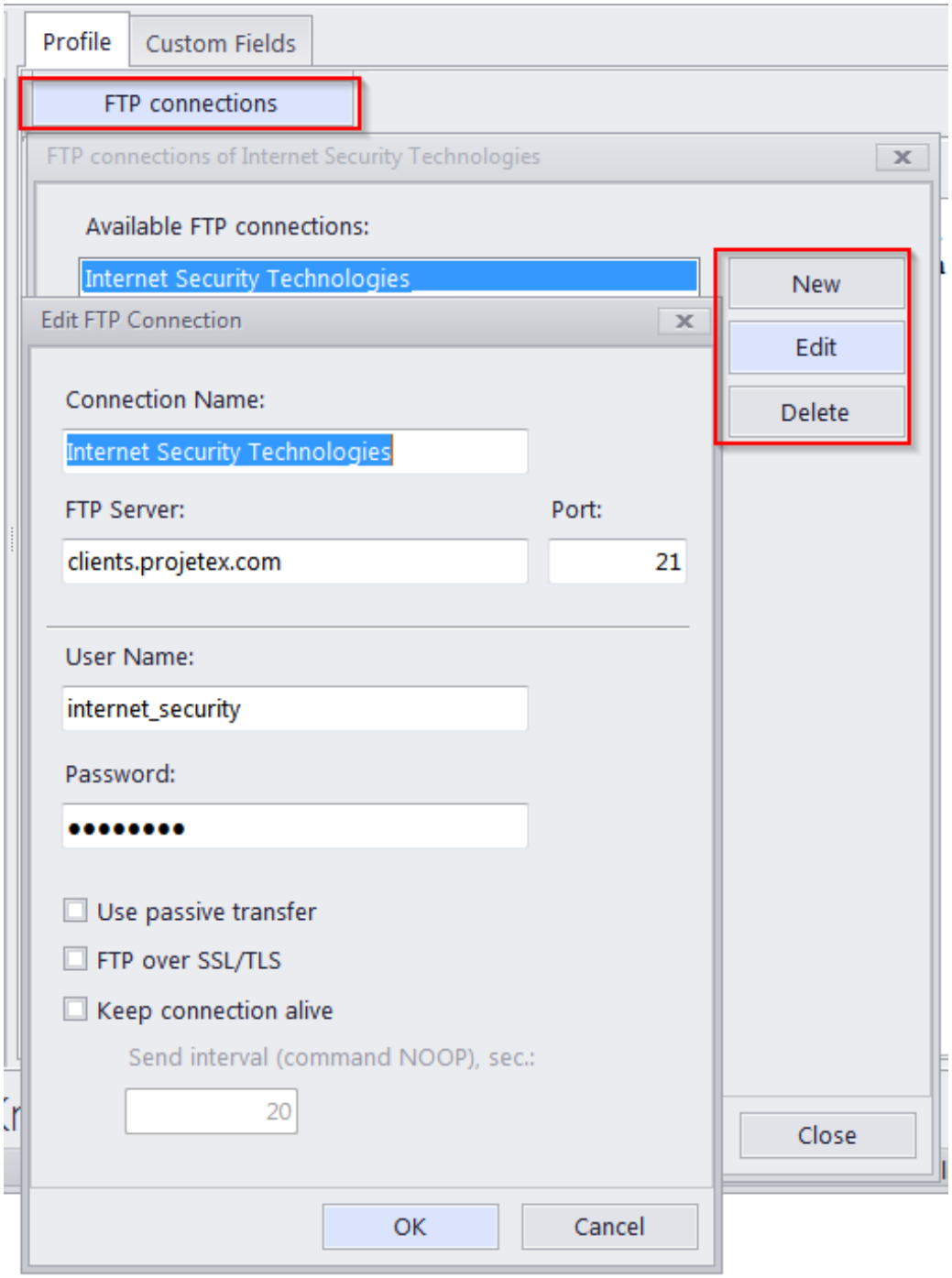
Password — this password will be used when TO3000 attempts to connect to the FTP folder. Can be no longer than 50 characters.

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.

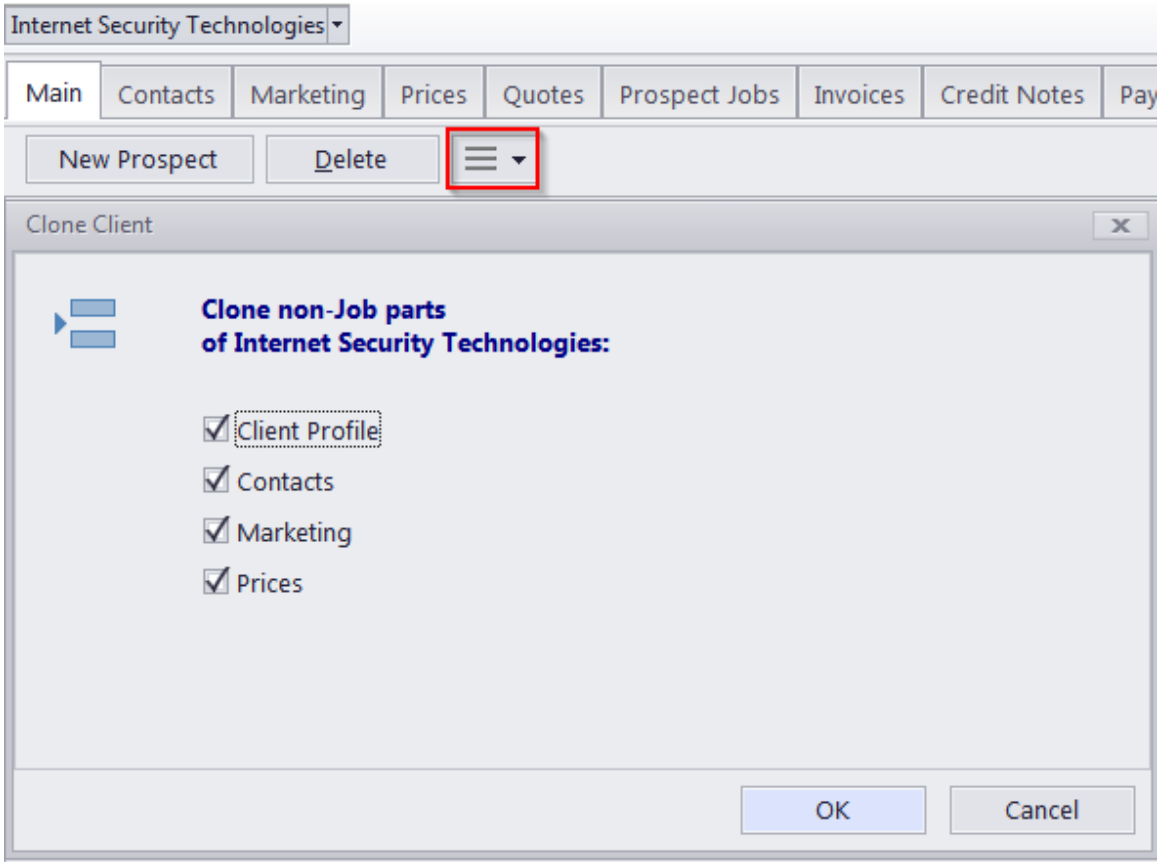
The **Keep connection alive** option sets whether TO3000 should continue trying to connect to a non-responding FTP address. If this option is enabled, you can also set the interval between connection attempts.

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



Cloning

In case the prospect you are about to create, has the same or similar data as one of the existing prospects, it is recommended to use the clone option to copy selected data from the existing prospect to a new one.



The following data can be copied:

Profile — although it is unlikely that two different prospects will have same profile information (like address or contact details) some information such as payment terms, invoicing policy and locale settings may be common.

Contacts — cloning contacts (**Contacts** tab of **Prospect** window) data may have time when creating a prospect for new department or subsidiary of an existing prospect.

Marketing — marketing information (**Marketing** tab of **Prospect** window) can also be cloned.

Prices — if a new prospect has same or similar prices (**Prices** tab of **Prospect** window) as one of the existing **Prospects**, this data can also be cloned.

To clone a prospect record, select the required prospect from the list on the **Main** tab of **Prospect** window, click the **More...** button and select **Clone**. The newly cloned prospect will appear in the list with the CLONED string added to their name.

Converting into a client

Once you strike a deal with a prospective client, you can convert them into a full client.

All the database entries connected to the prospect and all of the prospect's files will be moved into the Clients database.

To convert a client in to a prospect, click the **More...** button (hamburger icon) and select **Move to Clients.**

6.1.2. Contacts tab

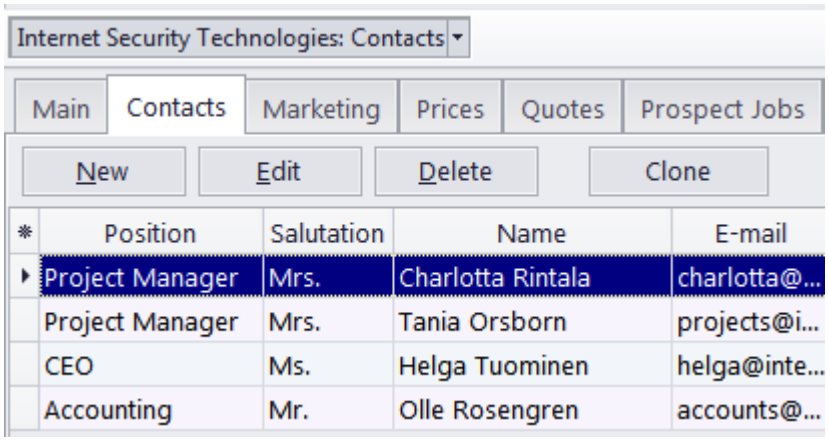
A prospect's *Contacts* are persons on the client side which you work with regarding this prospect's potential projects/jobs.

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

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

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

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

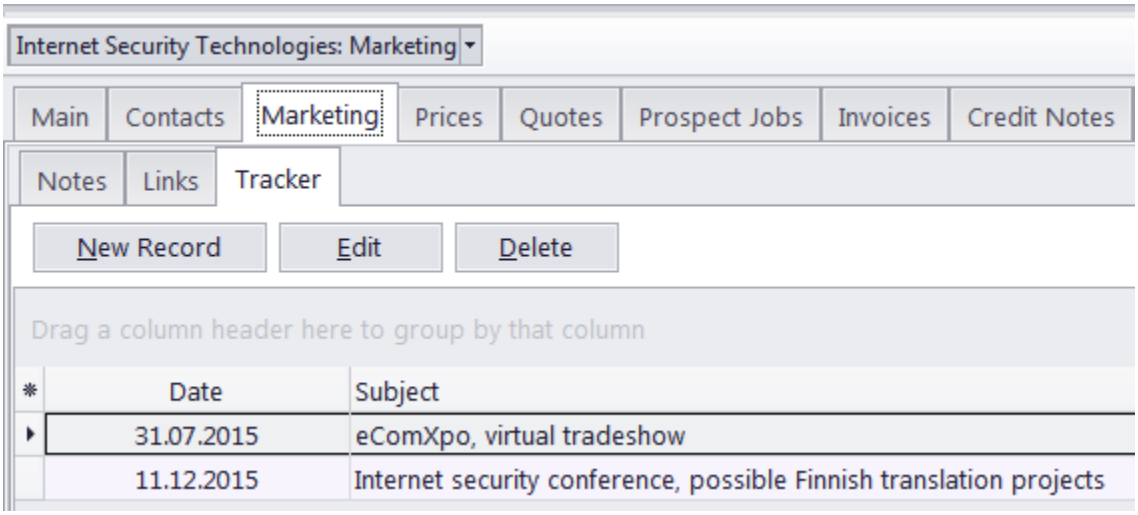


6.1.3. Marketing tab

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

The **Marketing Tracker** can contain any number of records, each having a **Date**, **Subject** (250 characters maximum) and **Description** (a plain text note with no length limitation).

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



6.1.4. Prices tab

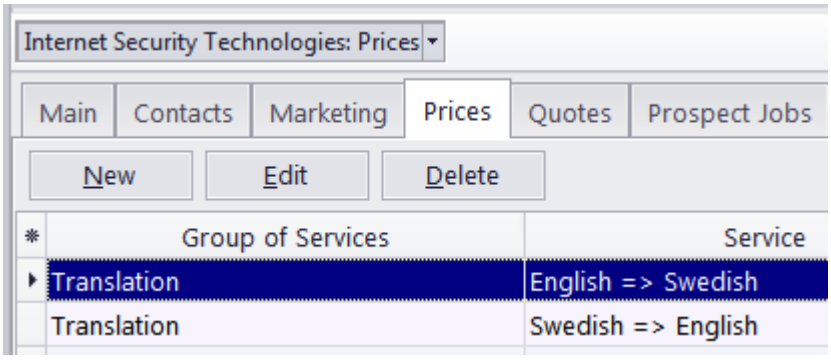
Each prospect in TO3000 can have a set of prices individual to them. These prices can be assigned on the **Prices** tab of the **Prospect** window.

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

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

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

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



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

You can also click the **Send Mail** button to open the TO3000 Mail Sender and send it to the Prospect's E-mail address as an attachment.

6.1.5. Quotes tab

Quotes to prospect can be managed on the **Quotes** tab of the **Prospect** window. A quote can contain a number of draft prospect jobs, each job representing a service and its price being quoted.

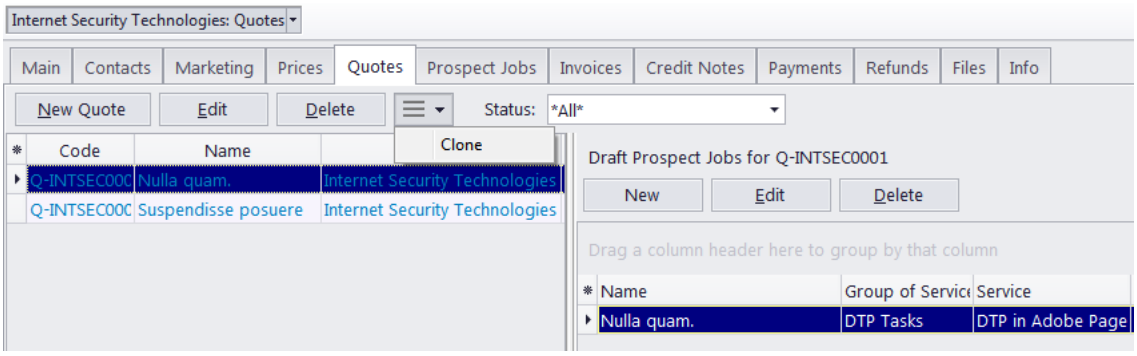
Like most workflow documents in TO3000 3D+, quotes can be saved to a printable file or printed. Please refer to the Creating quotes to prospects topic for more details.

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

- blue for Unknown
- green for Accepted
- red for Rejected
- purple for Received or Corrected

A quote's status can be changed in the **Edit Prospect Quote** window. Please refer to the Creating quotes to prospects topic for more details.

To manage quotes for a certain prospect, select this prospect in the list on the **Main** tab of the **Prospect** window and click the **Quotes** tab.



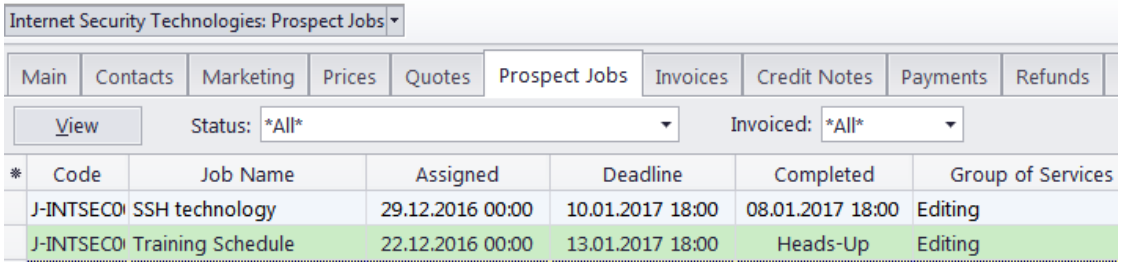
6.1.6. Prospect jobs tab

Prospect Jobs belonging to the currently selected former or inactive client can be viewed on the **Prospect Jobs** tab of the **Prospect** window.

Jobs can not be created, deleted, or edited here. This tab serves only to store previously created jobs.

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

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



Prospect Job Statuses

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

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

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

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

Black — the job is *completed*.

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

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

Orange background — *On Hold* status

Green background — *Heads-Up* status

Grey background — *Canceled* status

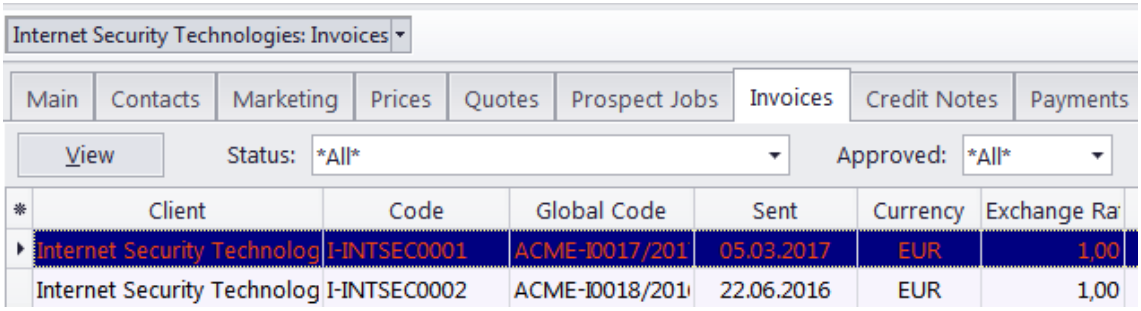
Note: You can change the status of any job with the help of the **Status** drop-down list in the **Edit Job** window.

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

6.1.7. Invoices tab

The **Invoices** tab of the **Prospect** window is used to keep record of invoices issued to currently selected former or inactive client.

Invoices can not be created, deleted, or edited here. This tab serves only to store previously issued invoices.



Filters

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

You can also set TO3000 to display only those invoices which have or have not been approved by applying the **Approved** filter.

Invoice Statuses

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

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

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

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

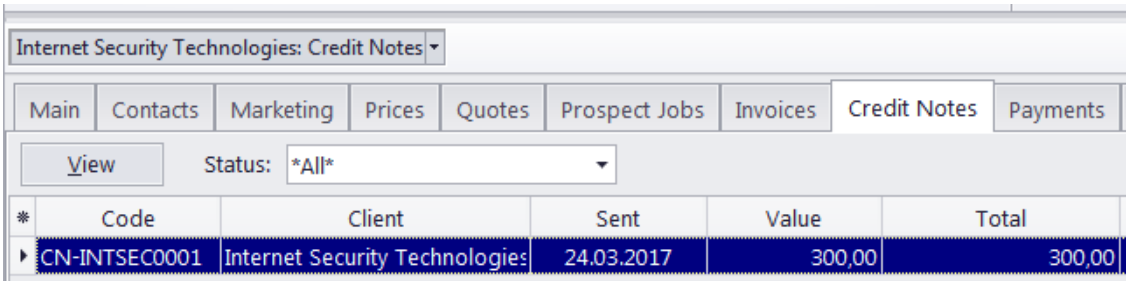
Black — the invoice has been *settled* (paid) or voided.

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

6.1.8. Credit notes tab

The **Credit Notes** tab of the **Prospect** window displays Credit notes for the currently selected former or inactive client.

Credit Notes can not be created, deleted, or edited here. This tab serves only to store previously issued credit notes.



6.1.9. Credit Note Statuses

Credit notes can have one of four statuses:

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

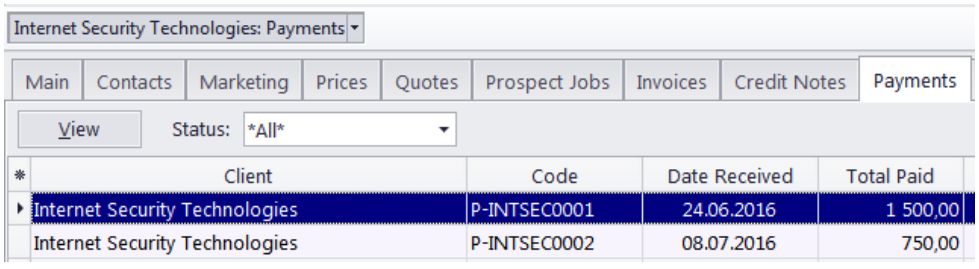
Filter

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

6.1.10. Payments tab

The **Payments** tab of the **Prospect** window displays the payment records of the currently selected former or inactive client.

Payments can not be created, deleted, or edited here. This tab serves only to store previously received payments.



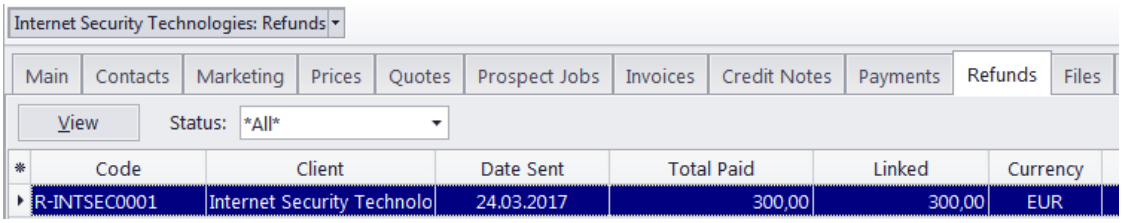
Filter

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

6.1.11. Refunds tab

The **Refunds** tab of the **Prospect** window displays the refund records of the currently selected former or inactive client.

Refunds can not be created, deleted, or edited here. This tab serves only to store previously issued refunds.



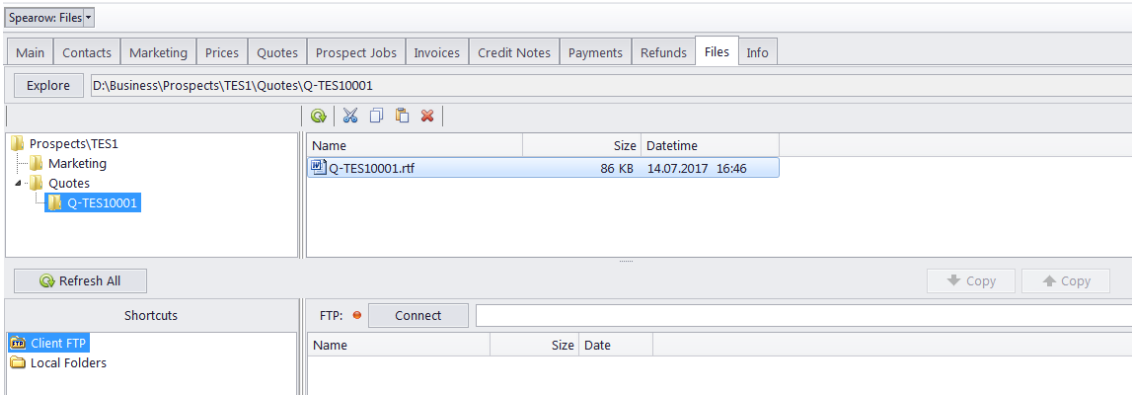
Filter

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

6.1.12. Files tab

Files tab of the **Prospect** window provides you with possibility to create the prospect folder with one click, create, view and search for files and folders related to this prospective client. Folder navigation is described in File manager topic.

Files of client contain invoices, quotes and other documentation of the prospect.



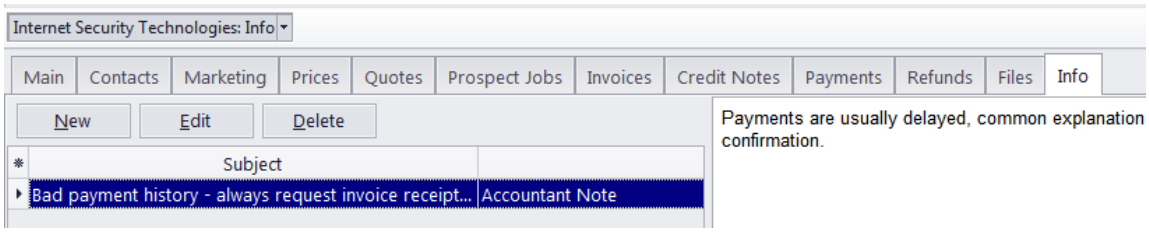
6.1.13. Info tab

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

Each note record consists of the following elements:

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

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



6.2. Prices Window

The **Prospect Prices** window displays your general price-list. These prices can be used when creating quotes for any prospect in your database.

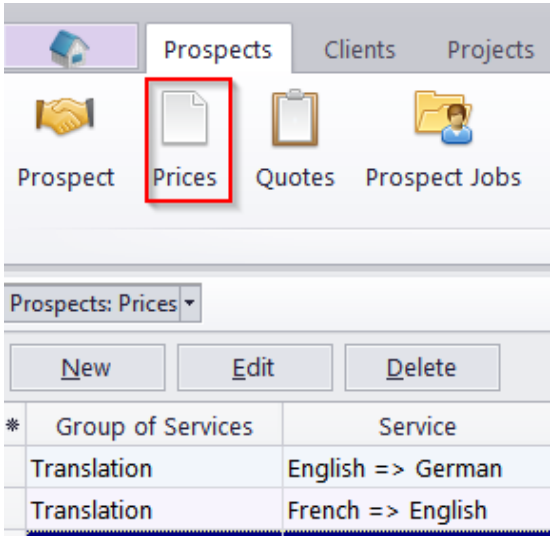
Note: Any prices added to this list will also appear on the **Client Price List**, and vice versa.

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

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

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

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.

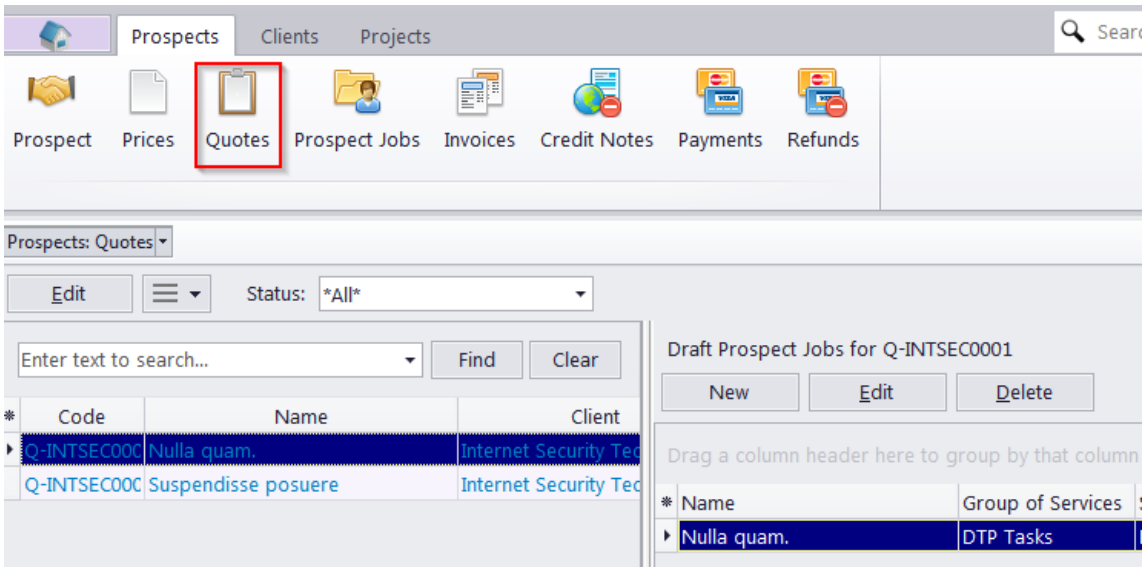
To configure the price list templates, in the Backstage view click **Business Settings** and then click **Templates**. Price list templates are stored in the *C:\Users\Public\Documents\AIT\TO3000, Version 3D\Templates\PROSPECT\Prices* folder.

6.3. Quotes window

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

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

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



Quote Status

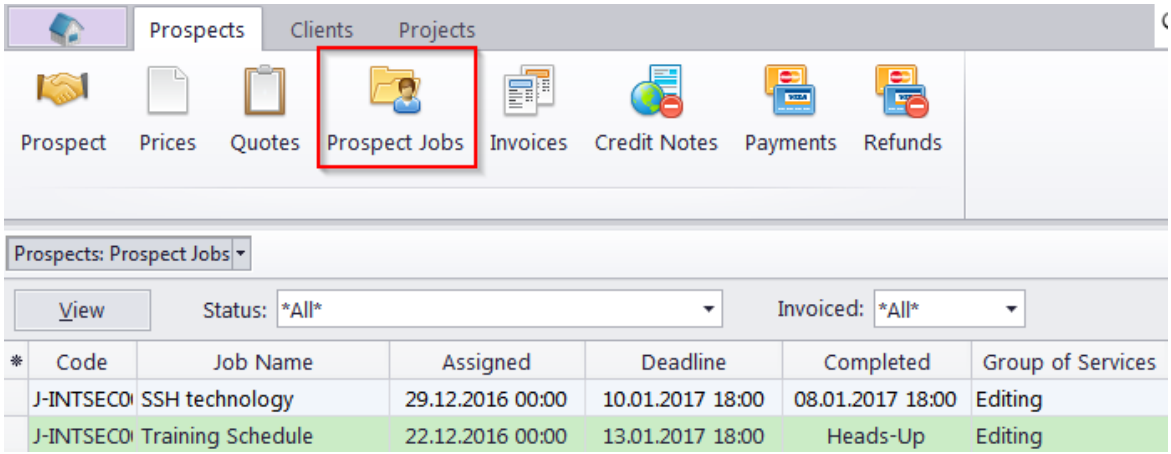
A quote can have one of the five statuses: Unknown, Accepted, Rejected, Received, and Corrected. Depending on its current status, the quote will be marked with a different color in the quotes list:

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

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

6.4. Prostect Jobs window

All jobs for former or inactive prospects stored in the database are listed in the **Prospect Jobs** window. The options available for this window are the same as those for the **Prospect Jobs** tab of the **Prospect** window. The major difference is that the **Prospect Jobs** window displays all prospect jobs of all former or inactive prospects.



Filters

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

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

Prospect Job statuses

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

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

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

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

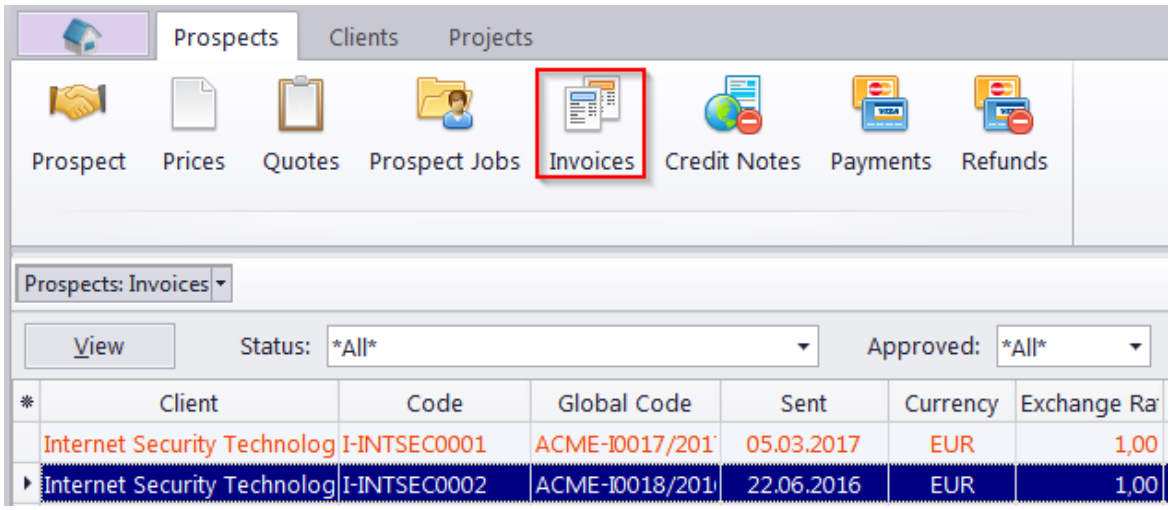
- Orange background — *On Hold* status
- Green background — *Heads-Up* status
- Grey background — *Canceled* status

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

6.5. Invoices window

The **Prospect Invoices** window displays a general overview of all invoices, issued to all former or inactive clients in the database. It can be used to identify currently unpaid invoices and obtain a total of balance due according to all invoices issued.

The options available for this window are the same as those for the **Invoices** tab of the **Prospect** window. The major difference is that the **Prospect Invoices** window displays all invoices for all former or inactive clients.



Filters

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

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

Invoice Status

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

- Green — the invoice is Outstanding and is expected to be paid soon.
- Blue — the invoice is Outstanding and is expected to be paid today.
- Red — the invoice is Outstanding and its payment is overdue.
- Black — the invoice has been Settled (paid).

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

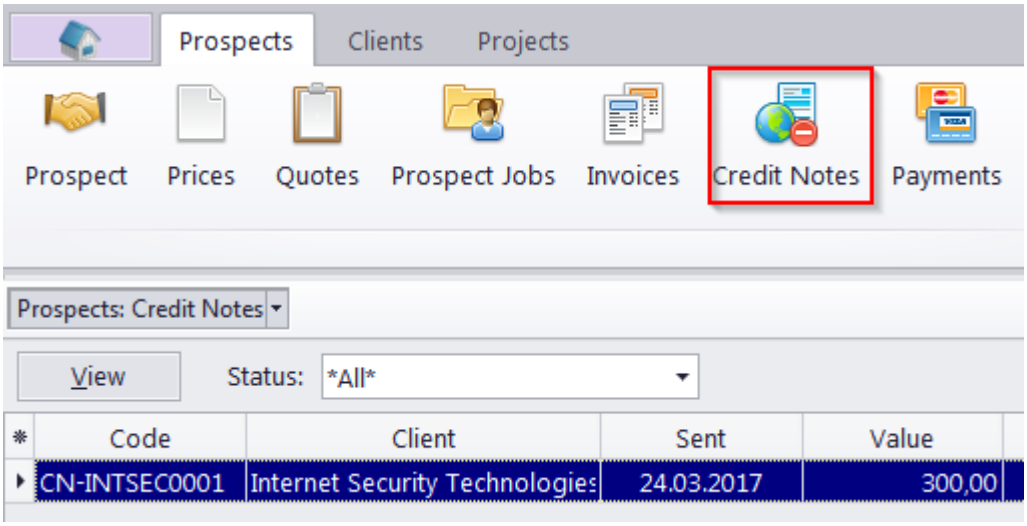
TO3000 automatically assigns statuses to Invoices depending on the Payment Terms set for each client.

6.6. Credit notes window

The options available for this window are the same as those in the **Credit Notes** tab of the **Prospect** window.

The major difference is that the **Prospect Credit Notes** window displays all credit notes to all former or inactive clients.

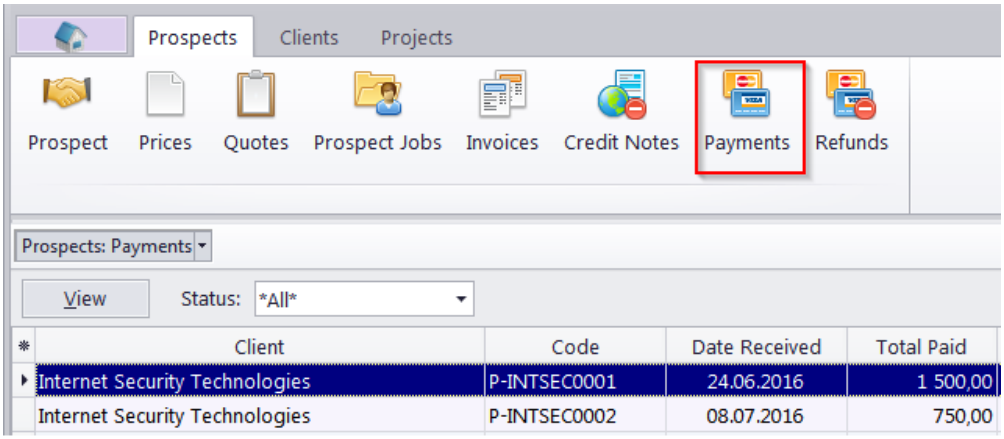
Use the **Status** filter drop-down list to display only credit notes with a specific status (Closed, Awaiting Payment, Partially Paid, or Fully Paid).



6.7. Payments window

The **Prospect Payments** window displays all payments from all former or inactive clients in one table. This window can be used to obtain total values of money transfers received from former or inactive clients.

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

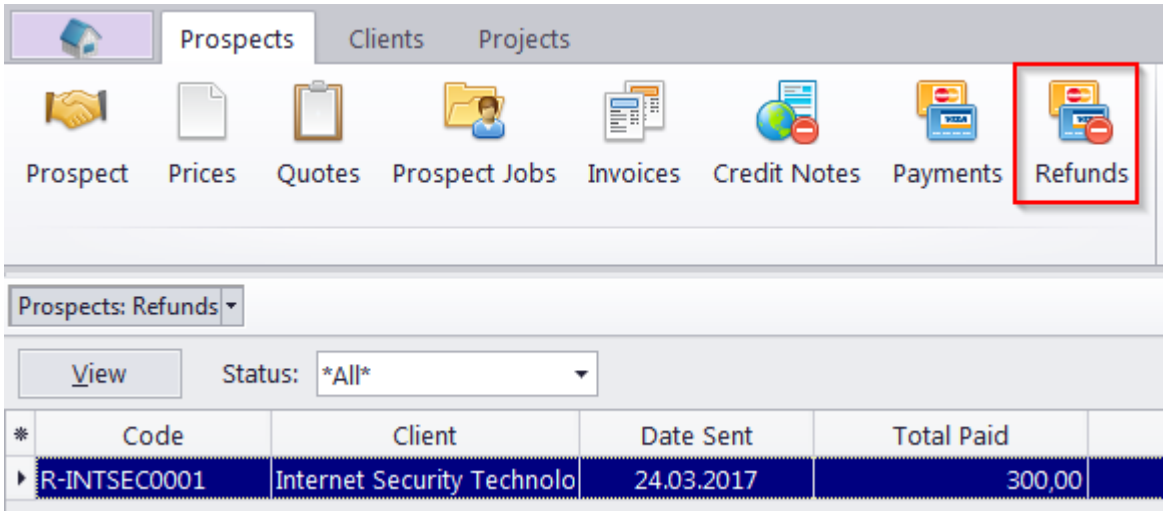


6.8. Refunds window

The options available for this window are the same as those in the **Refunds** tab of the **Prospect** window.

The major difference is that the **Prospect Refunds** window displays all refunds to all former or inactive clients.

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



6.9. Creating prospects

Prospects in TO3000 3D+ are created on the Main tab of the Prospect window. To create a Prospect record, please follow the steps below:

1. Click the **New Prospect** button above the **Prospect** list on the **Prospect** window > **Main** tab.

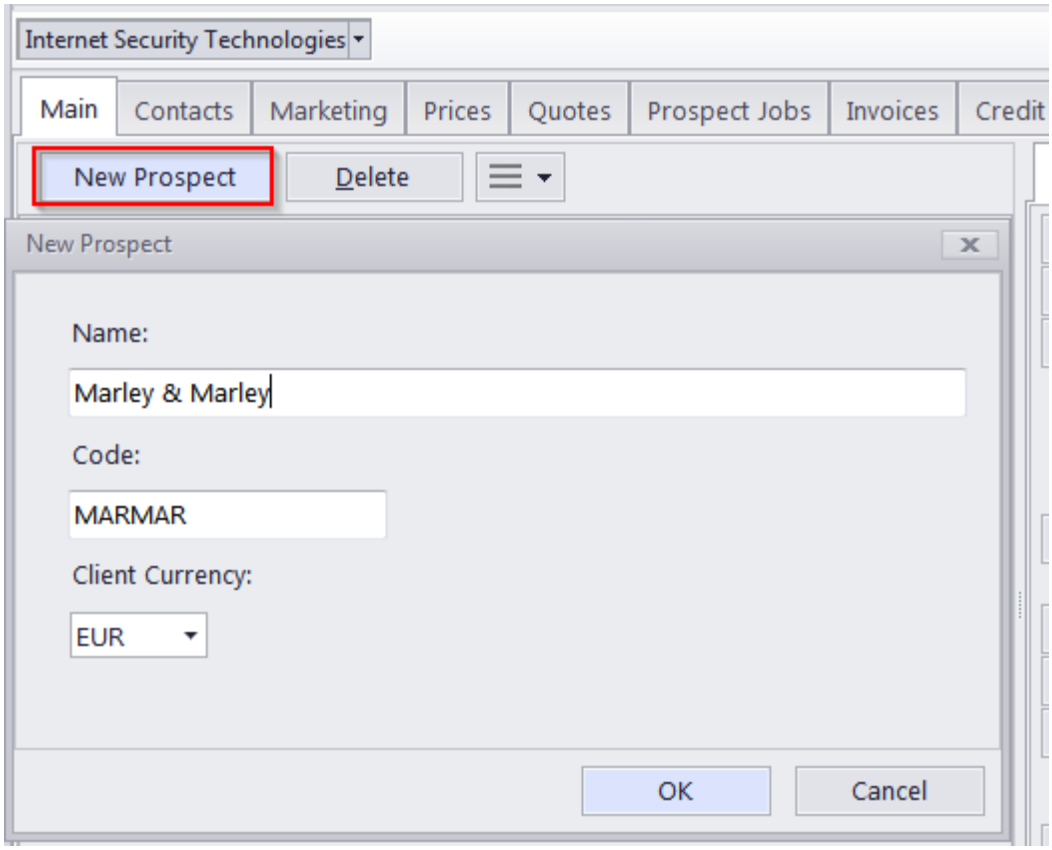
2. Fill the fields of the **New Prospect** window:

•Enter the name of the prospect in the **Name** text field.

•The code for the **Prospect** record in the **Code** text field is generated automatically (it will usually contain the first letters of the **Name** in this case) but can be edited as well.

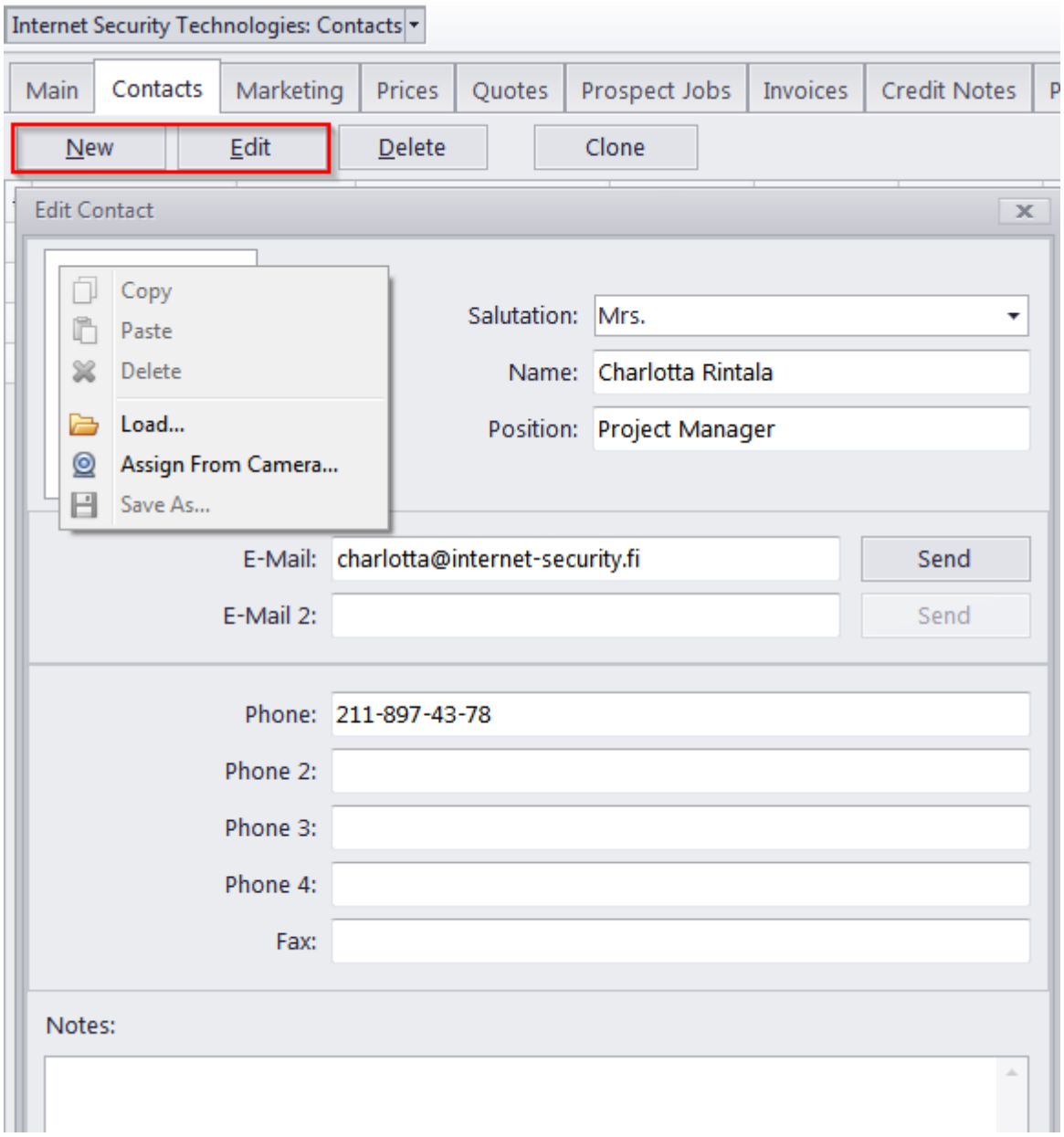
•Select the **Prospect Currency** using the corresponding drop–down list.

•Click **OK** to confirm or **Cancel** to discard the entered information.



6.10. Creating contacts

To add or edit a contact person to a prospect's profile, click the **New/Edit** button on the **Contacts** tab of the **Prospect** window.



The following data can be added to a *Contact* profile:

Photo – up to 110x120 pixels. Click **Load, Paste** or **Assign from camera** to add a photo to the contact's profile. Click **Delete** to remove the current photo from the profile.

Salutation – select one of the salutations, entered with the help of the Advanced Settings section of TO3000 3D+. This salutation can then be automatically displayed on all printable documents next to this contact's name.

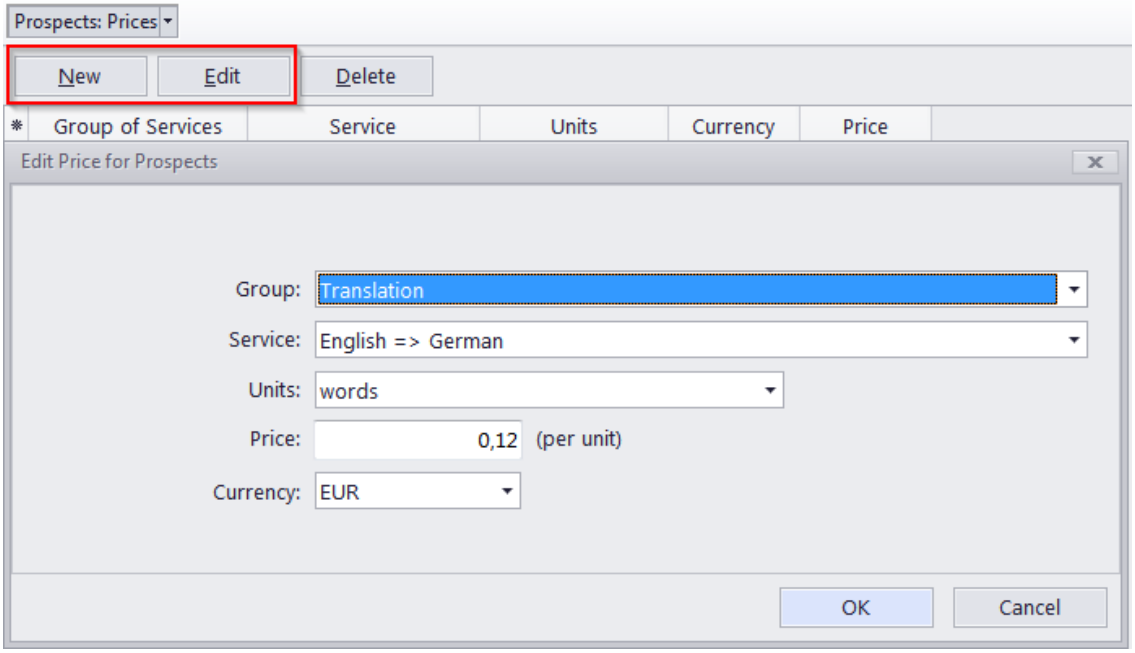
Name – maximum 80 characters.

Position – maximum 40 characters. Like the salutation, the position will also be automatically displayed on printable documents.

E–mail (up to 2) – maximum 150 characters. The **Send** button becomes active only if a valid e–mail address is entered.

6.11. Creating prospect prices

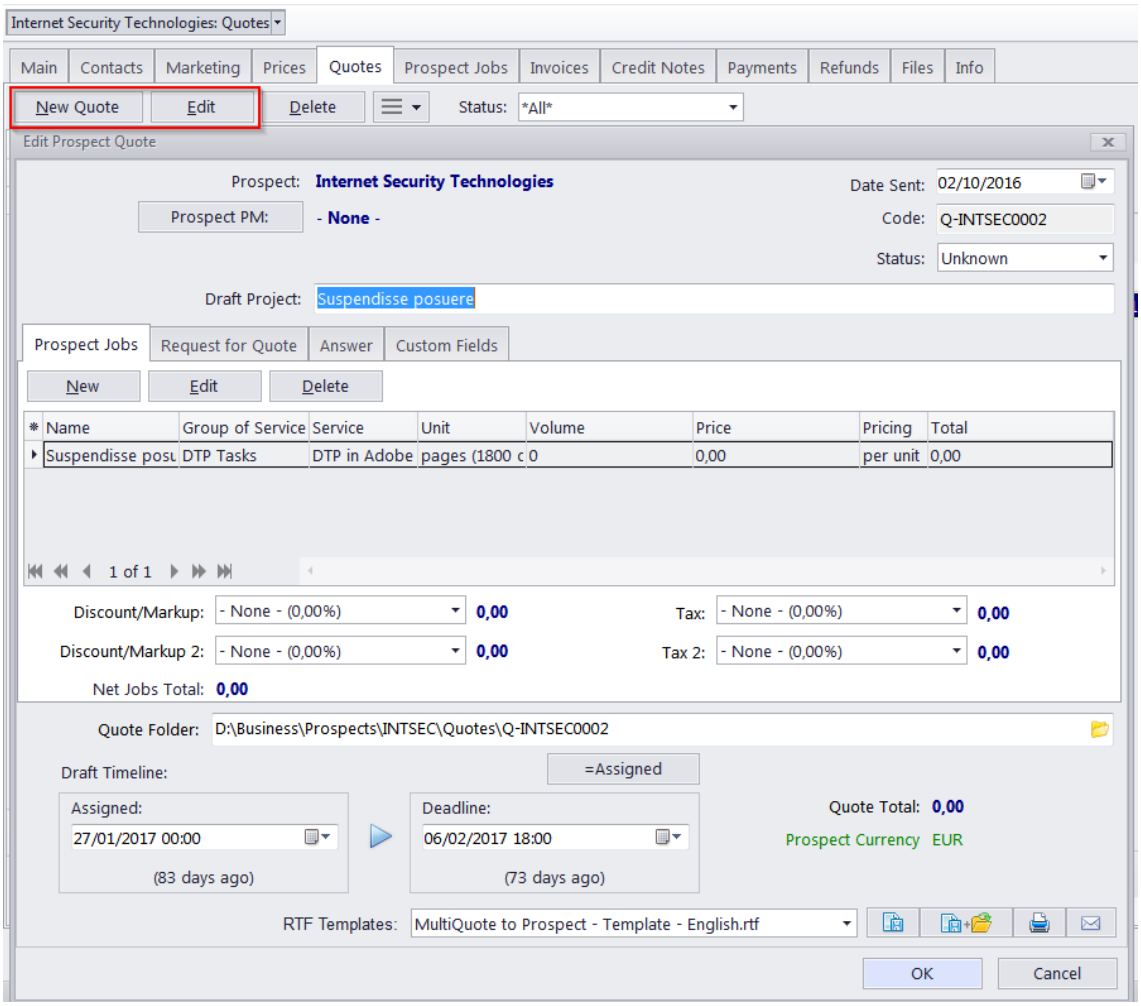
To add or edit a price, click the **New/Edit** button on the **Prices** tab of the **Prospect** window to create/edit an individual price, or in the **Prospect Prices** window to create/edit a general price.



Prospect prices in TO3000 3D+ have the following parameters:
Group - you can select any of the groups of services available. To add or edit a group of services please open Business Settings in the Backstage view, and select the Groups of Services section.
Service - each group of services contains a separate list of services. Before selecting a service, select the group of services first. To add or edit a service please open Business Settings in the Backstage view, and select the Services section.
Units - prices in TO3000 3D+ are quoted per certain units. Price can only be applied to a Prospect Draft Job with its volume in the same units. To add custom units please open Business Settings in the Backstage view, and select the Volume Units section.
Price (per unit) - To add currencies to view open Business Settings in the Backstage view, and select the Currencies section. To configure exchange rates between your base currency and other currencies, open Business Settings in the Backstage view, and select the Exchange Rates section.

6.12. Creating quotes

All quote information can be added or changed in **Edit Quote** window. To open this window for selected quote double-click this quote in the list.



Prospect PM - select one of the prospect's contacts as the project manager for this draft project (on the prospect's side). Please see the Contacts topic for details.

Date sent - aside from reference purposes, this date will also be used by the *Global Date filter*. Please see the Global Date Filter topic for details.

Code - the code of the quote is generated automatically. In this code the "*Q*" character means that this is a quote, the letters afterwards represent the code of the prospect and the number is the value of the quote counter for this prospect. Each prospect has an independent code counter for quotes.

Status - the settings in this drop-down list determine the color in which the quote will be shown in the list on the **Quotes** tab of the **Prospect** window or in the Prospect Quotes window.

Draft Project - the name of the quote. A draft project's name can contain 100 characters maximum.

Prospect Jobs - lists the draft prospect jobs in this quote. Use the Customize columns option to configure which data should be displayed. Please see the Draft Prospect Job topic for more details.

Quote folder - quote folders are created in the Quotes folder located inside each prospect folder. The quote code is used in naming the quote folder.

Draft Timeline - like a regular project, quote has assigned and deadline dates.

Request for Quote, **Answer** - enter a plain text note here.

Custom Fields - quotes can also contain custom data (for example custom statuses, dates or notes) added in the form of custom fields. If you have any number of custom fields in quotes, their controls can be found on the **Custom Fields** tab. For more information on adding custom fields please see the Custom Fields topic.

Saving and printing Prospect Quotes

You can print quotes or save them in text files by selecting an RTF template and clicking the **Save**, **Save and Open** or **Print** buttons at the bottom of the window. Click **Send Mail** to open the Mail Sender for the generated quote.

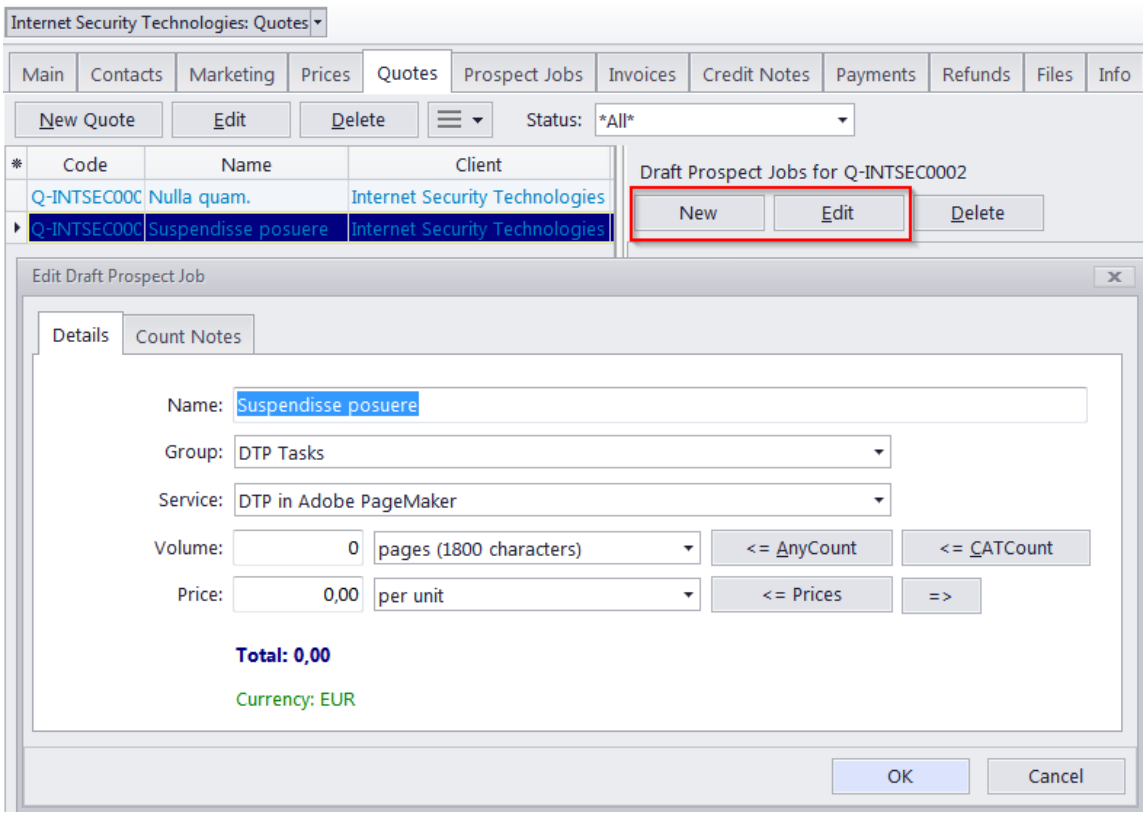
Use the **RTF Templates** drop–down list to select the template.

NOTE: You can choose to save the output file in *PDF* or *DOC* format by selecting this format in the **Save As** window with the help of the **Save as type** drop–down list.

To edit templates for quotes click User Settings in the Backstage view and select **Templates**. **Templates** for Prospect Quotes are located in the *C:\Users\Public\Documents\AIT\TO3000, Version 3D\Templates\PROSPECTS\Quotes* folder.

6.12.1. Draft Prospect jobs

There are two ways of adding or editing draft prospect jobs: either in the **Edit Quote** window of required quote, or by selecting the quote and managing its Draft Prospect Jobs in the table to the right.



Draft Prospect Jobs contain the following data:

Name - maximum 100 characters long.

Group of services - you can select any of the groups of services available. To add or edit a group of services please open Business Settings in the Backstage view, and select the Groups of Services section.

Service - each group of services contains a separate list of services. Before selecting a service, select the group of services first. To add or edit a service please open Business Settings in the Backstage view, and select the Services section.

Volume - when entering the volume being quoted, you can either use the volumes specified by the prospect, or count the prospect's file with the built-in AnyCount. CAT analysis can also be used to determine a draft job's volume. To count a file, click the **<=AnyCount** button. To enter a CAT analysis or load a Trados or Logoport log, click the **<=CATCount** button. Please refer to the AnyCount, and CATCount topics for details.

NOTE: Please make sure that correct volume units have been set before using AnyCount or CATCount. Jobs in such volume units as hours, for example, cannot be counted with AnyCount.

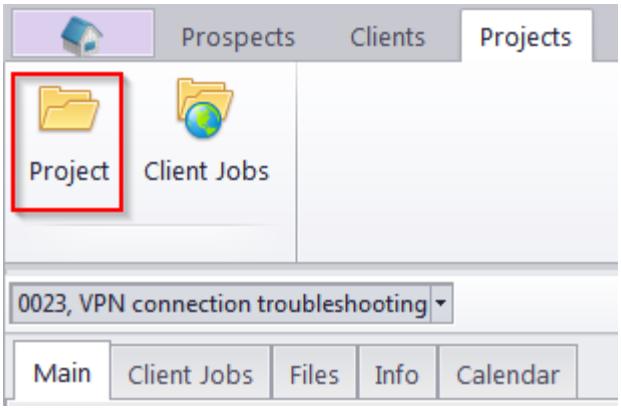
Price - the price value can be either entered manually or copied from the individual price-list of the prospect. Click the **<=Prices** button to copy the price from the prospect's price list. Click the **=>** button to add this price to prospect's price-list.

7. Projects (With Projects Mode only)

7.1. Project window

The Project Window can be used to view, edit and enter new information about your projects, as well as to create and manage *Client jobs* and *Project files*.

To open the **Project** window click the **Project** icon from the **Projects** tab of the **Ribbon**.



Project Window tabs

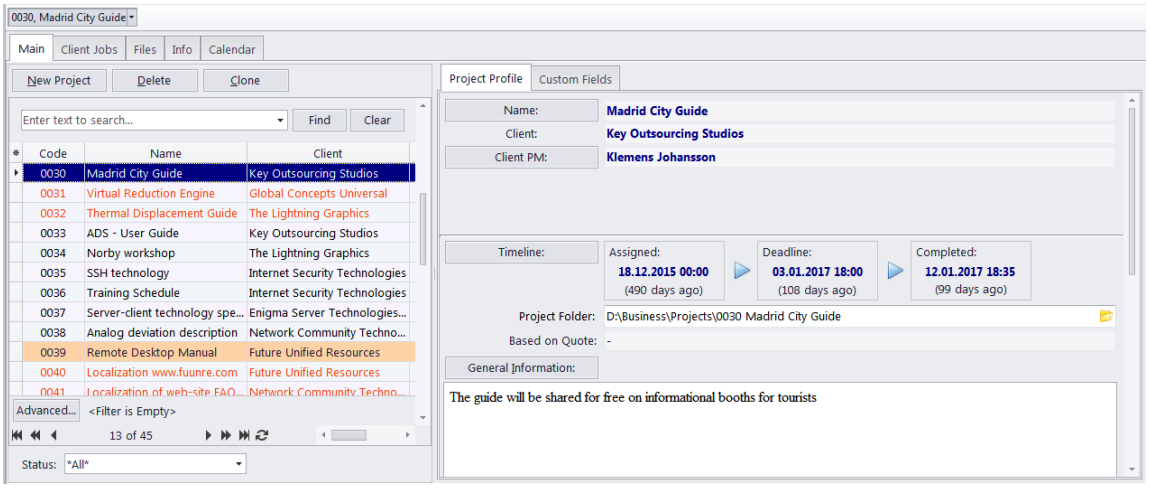
Different **tabs** of the Project window represent different aspects and elements of your projects, stored in the TO3000 3D+ database. Project data is broken into the following Project window tabs:

- The Main tab – provides the most basic overview of your Projects. Projects are created and marked as completed here. This tab also contains Project Profiles.
- The Client Jobs tab – gives an overview of Client Jobs of a Project. Client Jobs can be created here as well.
- The Files tab – provides quick access to the project folder of the selected Project, as well as to other files related to this Project.
- The Info tab – this tab is used for creating various project–related notes.
- The Calendar tab – a schematic overview of Project jobs, presented in the form of a calendar.

7.1.1. Main tab and Project Profile

The Main tab of the **Project** window contains a *list of projects* and *project profiles*. Use this tab to create new *Projects*, change project parameters and close *Projects* as they get completed.

To open the **Main** tab of the **Project** window, click the **Project** icon in the Ribbon, and then select the **Main** tab.



Project list options

To *search* for a project by its name, or any other field currently displayed, type the string being searched into the field over the project list and click Find.

To *sort the project list* by a certain column, click the *column's header* . Clicking the **Code** column will sort projects by their codes (chronologically), clicking the **Project name** column will sort projects by their names (alphabetically).

Information displayed in projects list can be configured. Use the **Customize columns** option to add or remove columns (Deadline, PM and so on).

Projects in the list can be filtered by project status (completed, heads-up and so on).

Status colors and flags

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

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

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

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

Black — the project is *completed*.

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

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

Orange background — *On Hold* status

Green background — *Heads-Up* status

Grey background — *Canceled* status

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

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

To flag a project, right-click it's entry and select a flag.

Editing project data

A Project Code is automatically assigned to each Project in TO3000 3D+. All Project Codes are unique and cannot be edited.

Name - the project's name can be up to 150 characters long.

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

Timeline - the timeline of a project in TO3000 3D+ includes the assigned and deadline dates, and the date when the project has been actually completed. The Deadline and Completed values are taken into account when the program determines the status of projects (like due today, overdue and so on).

Project Folder — this part of the project's profile can be used to store and access the project's work files. Click the Folder button on the right side of the field to open the folder in TO3000 Explorer (creating it if it does not exist yet).

Special Status - these are used when project needs to be put *on hold*, when you create a *heads-up* (or potential) project or *cancel* a project. Projects with *on hold* status have their deadlines undetermined, thus *on hold* projects cannot become overdue. Projects with *heads-up* status cannot be set as completed, since *heads-up* status assumes that work has not yet started. A project can also be *cancelled.* A cancelled project has no deadline, since the status implies that it was abandoned.

General Information - the project profile can contain any general information relevant to this project in the form of a plain text note.

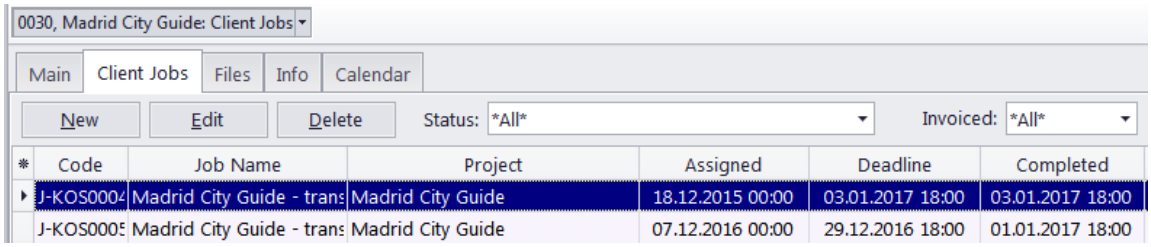
Custom Project Data

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

To add custom fields to projects, click Advanced Settings in the Backstage view, and click the **Fields** section.

7.1.2. Client Jobs tab

The Client Jobs tab lists all client jobs within the currently selected project.



Filtering Client Jobs

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

Use the **Invoiced** filter drop–down list to display only those **Client Jobs** which have or have not been invoiced.

Client Job Statuses

Jobs in the list are marked colors depending on its status:

- 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*.

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

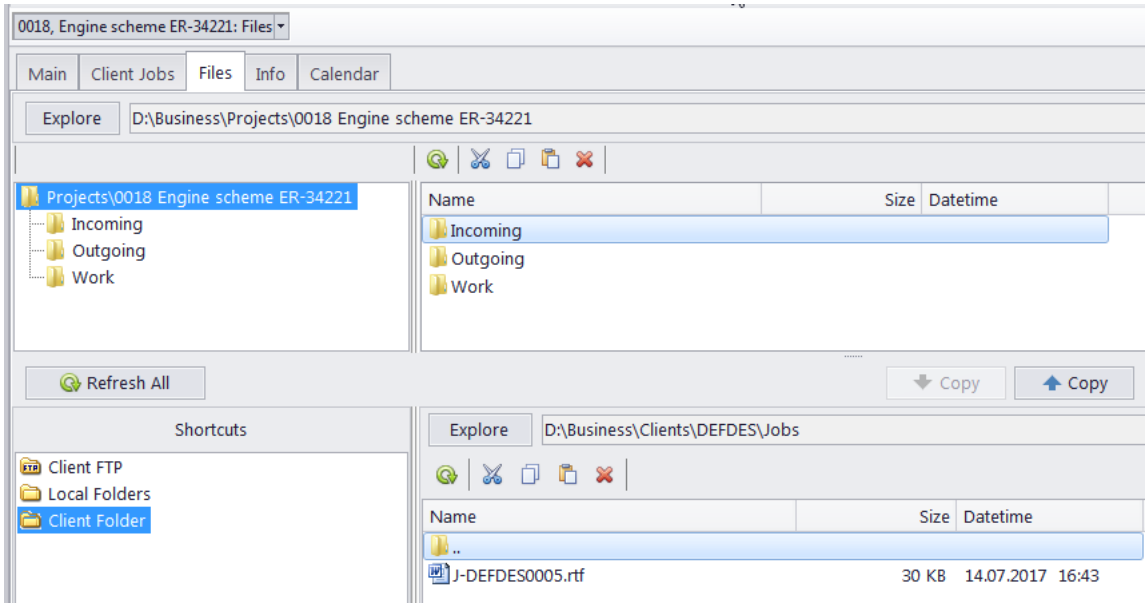
- Orange background — *On Hold* status
- Green background — *Heads-Up* status
- Grey background — *Canceled* status

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

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

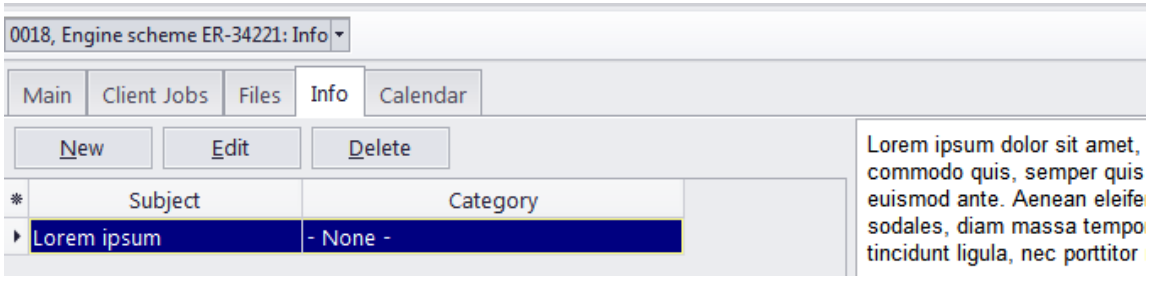
7.1.3. Files tab

The **Files** tab of the **Project** window provides you with the ability to create, view and search for files and folders related to this Project. Folder navigation is described in the File manager topic.



7.1.4. Info tab

The Info tab of the **Project** window can be used to enter any optional additional information regarding the selected the project in a plain text format. Notes can be filtered by custom categories.



Subject - maximum 100 characters long.

Category - categories of notes can be added by clicking **User settings** in the **Backstage** View and selecting **Categories**. See the Categories topic for additional details.

Information - a plain text note any umber of characters long.

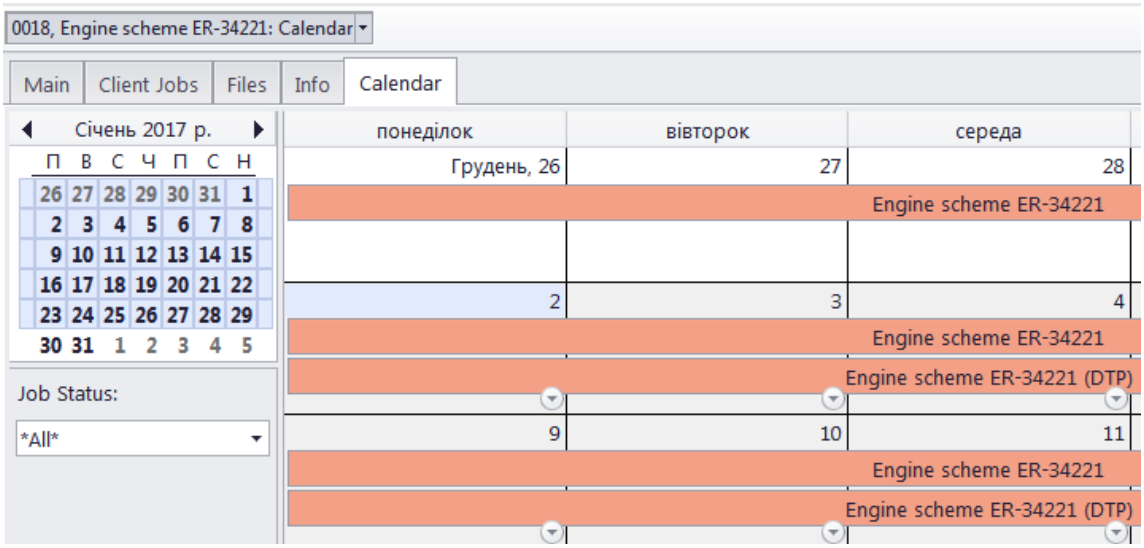
Notes can be filtered by the **Subject** or **Category** columns.

7.1.5. Calendar tab

The Calendar tab of the **Project** window displays *client jobs* belonging to the currently selected *project* in the visual format of *calendar blocks.* Each 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.

See the Using Calendars topic for more information on calendars.



Calendar block colors

Like the jobs they represent, calendar blocks 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.*

7.2. Client Jobs window

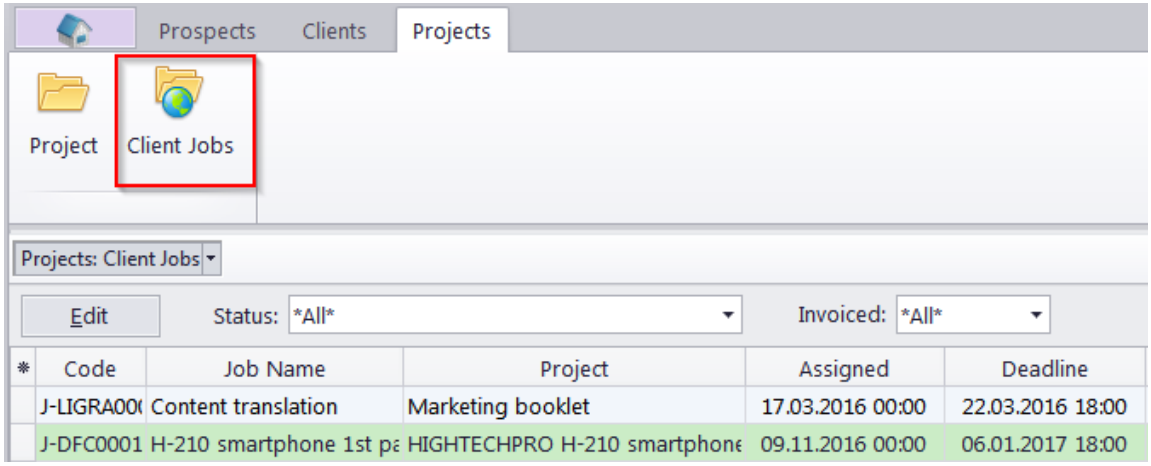
All **Client Jobs** stored in the database are listed in the **Clients Jobs** window. The options available for this window are the same as those for the **Client Jobs** tab of the **Project** window. The major differences are:

– The **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.

To open the **Client Jobs** window click the **Client Jobs** icon in the **Projects** section of the **Ribbon**.



Filtering Client Jobs

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

Use the **Invoiced** filter drop–down list you can select to display only those **Client Jobs** which have or have not been invoiced.

Client Job statuses

Jobs in the list are marked colors depending on its status:

- 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*.

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

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

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

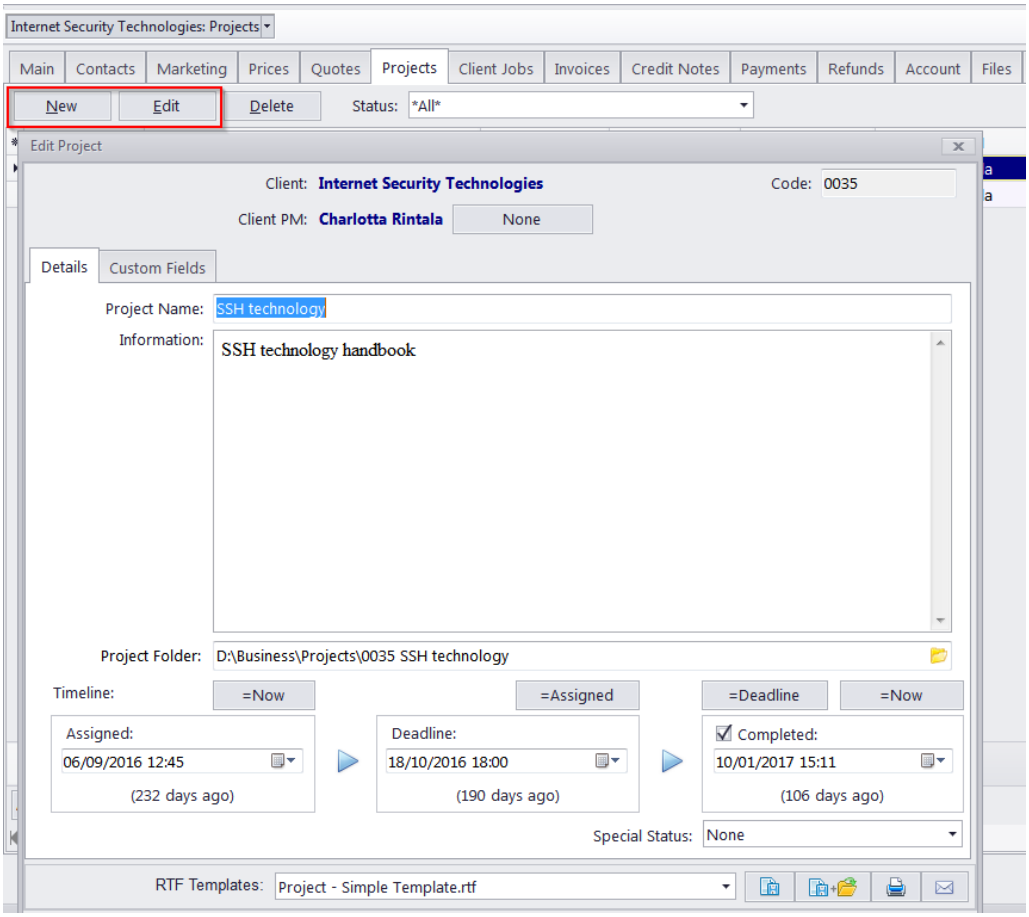
NOTE: You can change the colors on the Colors: Status tab of the User Settings menu in the Backstage view.

7.3. Creating a project

Projects are created from two areas of TO3000 3D+:

A: On the **Main** tab of the **Project** window by clicking the **New Project** button. You will be prompted to select a client when using this option.

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



New/Edit Project window

A Project Code is automatically assigned to each Project in TO3000 3D+. All Project Codes are unique and cannot be edited.

Name - the project's name can be up to 150 characters long.

Information - any general information relevant to this project in the form of a plain text note.

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

Timeline - the timeline of a project in TO3000 3D+ includes the assigned and deadline dates, and the date when the project has been actually completed. The Deadline and Completed values are taken into account when the program determines the status of projects (like due today, overdue and so on).

Project Folder — this part of the project's profile can be used to store and access the project's work files. Click the Folder button on the right side of the field to open the folder in TO3000 Explorer (creating it if it does not exist yet).

Special Status - these are used when project needs to be put *on hold*, when you create a *heads-up* (or potential) project or *cancel* a project. Projects with *on hold* status have their deadlines undetermined, thus *on hold* projects cannot become overdue. Projects with *heads-up* status cannot be set as completed, since *heads-up* status assumes that work has not yet started. A project can also be *cancelled.* A cancelled project has no deadline, since the status implies that it was abandoned.

Note: All project data except project code and client can be edited at any time later. See the Project Profile topic for details.

Note: Job data, like volumes, pricing and so on is added to an existing project in the form of client jobs. See the Creating Client Jobs topic for details.

You can save project data in a printable file or print it with the help of the *RTF templates interface*. You can also e-mail the template-generated document via the Mail Sender.

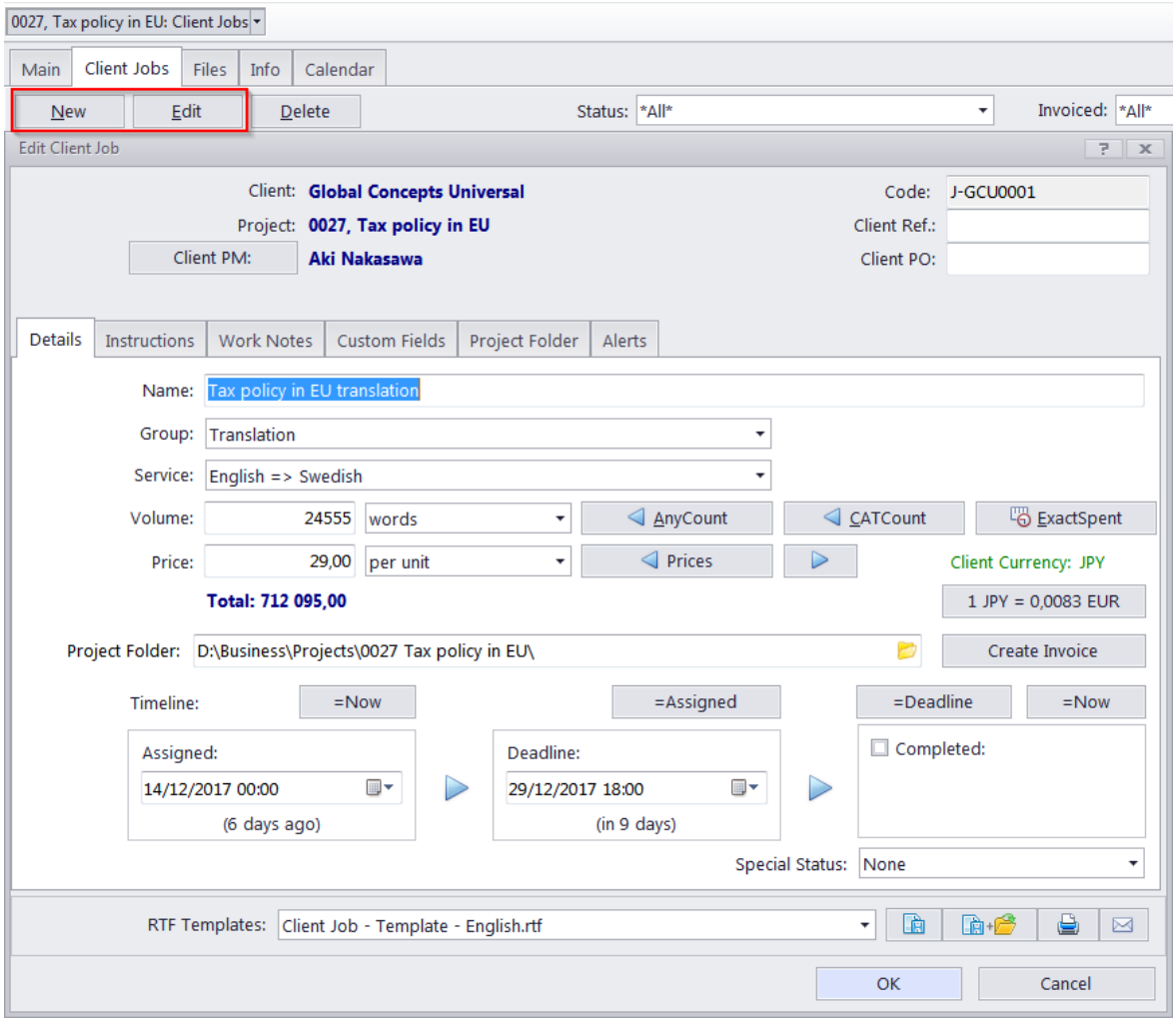
Templates for printing project data can be edited with the help of User Settings in the Backstage view. Click the **Templates** section to quickly access all template folders. Templates for printing projects are saved in the *C:\Users\Public\Documents\AIT\TO3000, Version 3D\Templates\PROJECTS* folder.

7.4. Creating client jobs

Client jobs can be created in the following areas of TO3000 3D+:

A: The Client Jobs tab of the **Client** window by clicking the **New** button (only in Without Projects mode).

B: The Client Jobs tab of the **Project** window by clicking the **New** button (only in With Projects mode).



New/Edit Client Job window

Code - a unique code of the client job is created automatically along with the job itself. The first character "*J*" indicates that this is a job code, the letters afterwards are the client code, and the number is the value of the client job counter for this client. Each client has an independent code counter for this code.

Client Ref. - the client reference can be a maximum of 20 characters long.

Client PM - one of the client's contacts, responsible for this job on the client side. The Client PM's name can be automatically included in the invoice containing this job. By default it is the Client PM selected for the entire project. Client jobs of the same project can have different client PMs. See the Contacts List topic for details on adding and editing options for the Client PM field.

Name - the name of the client job will appear in invoices where this job is included (usually this is the name of the document being worked with). This name does not need to include the language pair or service name, since this data is being added separately.

Group - the group of services. All services in TO3000 3D+ are broken into groups. You can select any of the groups of services available. To add or edit a group of services please open **Business Settings** in the **Backstage** view, and select the Groups of Services section.

Service - each group of services contains a separate list of services. Before selecting a service, select the group of services first. To add or edit a service please open **Business Settings** in the **Backstage** view, and select the Services section.

Volume - the job's volume can be indicated in a number of units (characters, words, lines, hours and so on). To add custom units please open **Business Settings** in the **Backstage** view, and select the Volume Units section.

You can also use the built-in AnyCount or CATCount tools to quickly count the job file, or calculate CAT text volumes (100% match, fuzzy match, and so on). You can also import Trados and Logoport logs with the help of the CATCount tool to quickly enter the required volume. See the AnyCount and CATCount topics for details.

If you have ExactSpent installed, you can use it to track the time you spent performing this job, and automatically update this data in TO3000. See the topic Integration with ExactSpent for more details.

Price - the price can be entered manually or copied from the client's individual price-list. To copy a price from the price-list click the **Prices** button. The price for a matching service, group of services and unit combination will be copied. Click the button to copy the current price to this client's price list. You can set a fixed price for the client job (which will not be multiplied by the job volume) by selecting the **flat fee** option in the drop-down list next to the price field. Select the **free** option in the same drop-down list to set the job total to zero. The price and volume in a free job must not necessarily be zero.

If the client currency differs from your base currency, the **Currency Exchange Rate** button will be available. By clicking this button, you may change the *currency exchange rate* used in this *job*. Note that this button does not change the general exchange rate stored in your TO3000 database. To change the exchange rate for all future jobs go to the Exchange Rates tab of the Business Settings.

Job Folder - when creating client jobs it is often necessary to work with job files (for example you may need to count a client job file for exact volume). Once the folder has been created, its contents can quickly be accessed on the **Job Folder** tab of the **New/Edit Client Job** window.

Create Invoice button - immediately creates an invoice for the job being edited.

Timeline - the timeline of a client job in TO3000 3D+ includes assigned and deadline dates, and the date when the client job has been actually completed. The Deadline and Completed values are taken into account when the program determines the status of client jobs (like due today, overdue and so on).

Special Status - these are used when the client job needs to be put *on hold*, when you create a *heads-up* (or potential) job or to *cancel* a job. Jobs with *on hold* status have their deadlines undetermined, thus *on hold* jobs cannot become overdue. Jobs with *heads-up* status cannot be set as completed, since *heads-up* status assumes that work has not yet started. *Cancelled* jobs can not be completed either, since the status implies that the job was abandoned.

Instructions - any instructions or comments of the client regarding a client job can be entered here in the form of a plain text note.

Work Notes - work notes can be entered here. It is recommended to enter client notes and work notes separately.

Custom Fields - client job information can be customized by adding custom fields for additional information not foreseen by default controls.

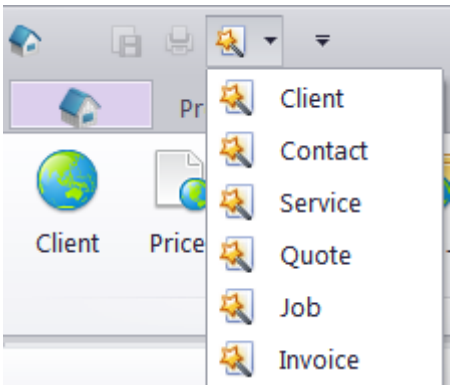
You can save client job data in a printable file, print it, or send it via Email with the help of the *RTF templates interface*.

Templates for printing job data can be edited with the help of **User Settings** in the **Backstage** view. Click the **Templates** section to quickly access all template folders. Templates for printing client jobs are saved in the *C:\Users\Public\Documents\AIT\TO3000, Version 3D\Templates\CLIENTS\Jobs* folder

8. Wizards

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

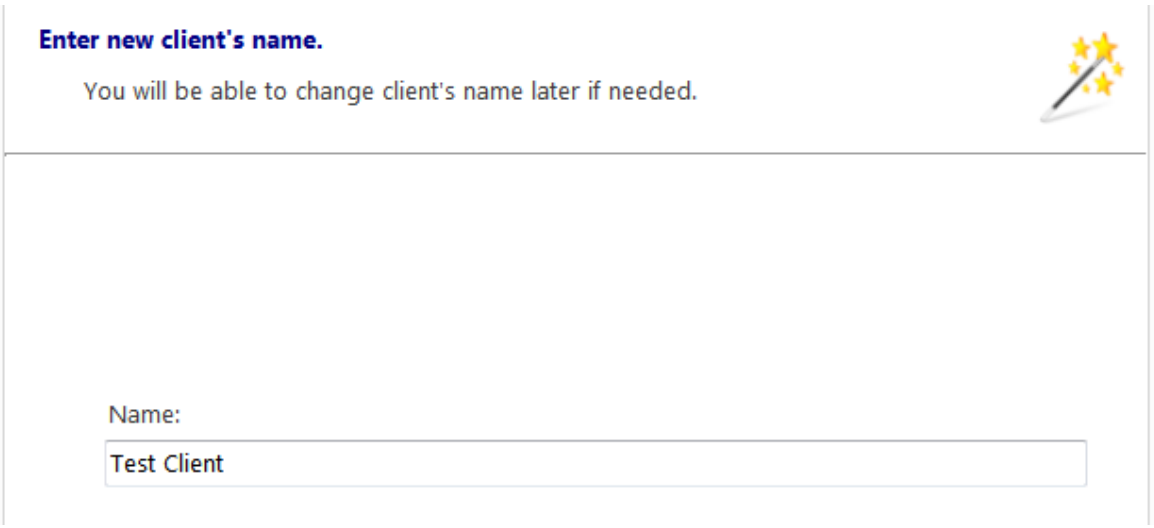
Wizards can be accessed via the drop-down menu in the upper-left corner of the main window.



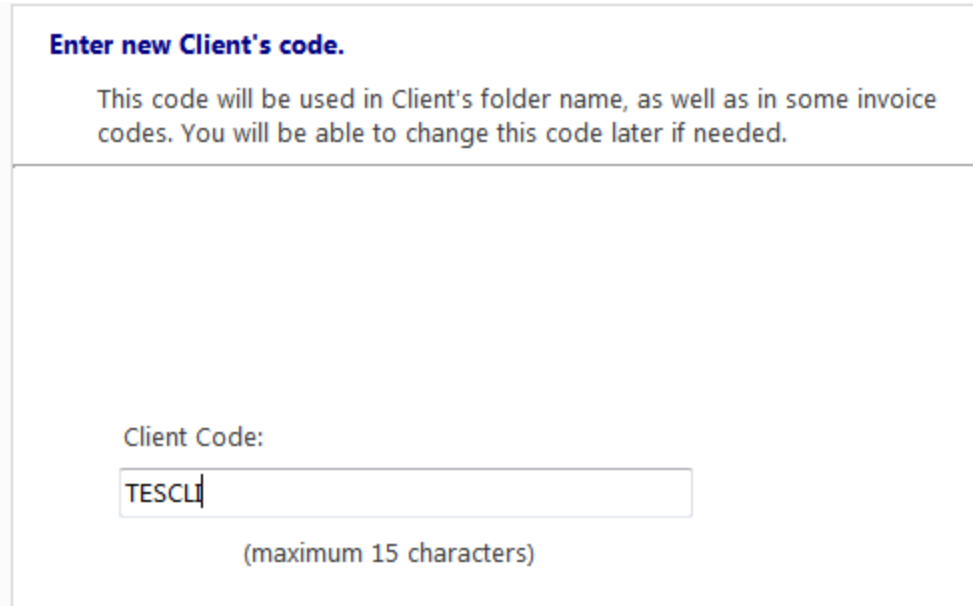
8.1. Client Wizard

The New Client Wizard guides you through the user creation process in 8 steps. After entering the required information

1. Enter the Client's name.



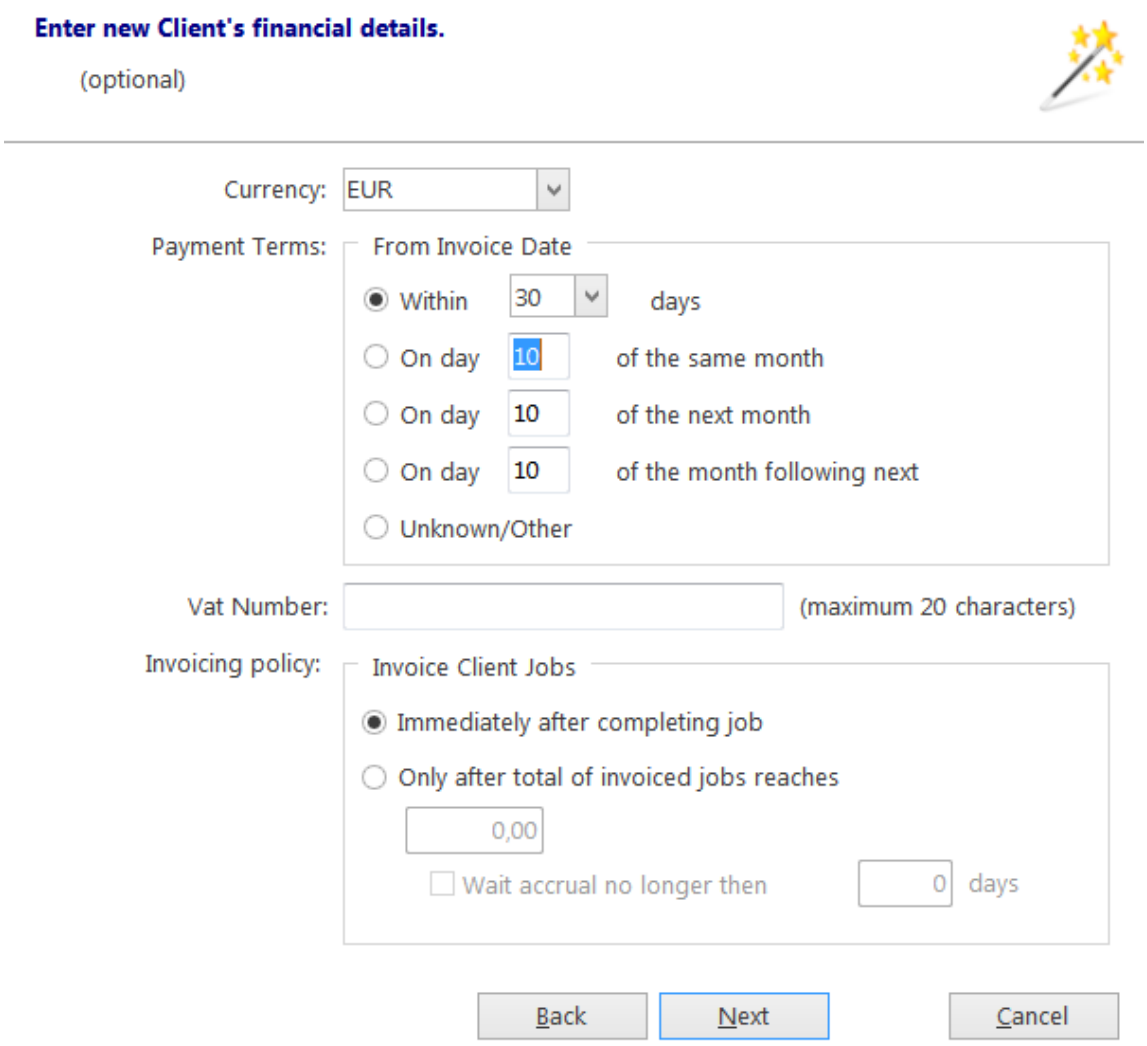
2. The client's code is generated from the name. You can confirm or Edit it.



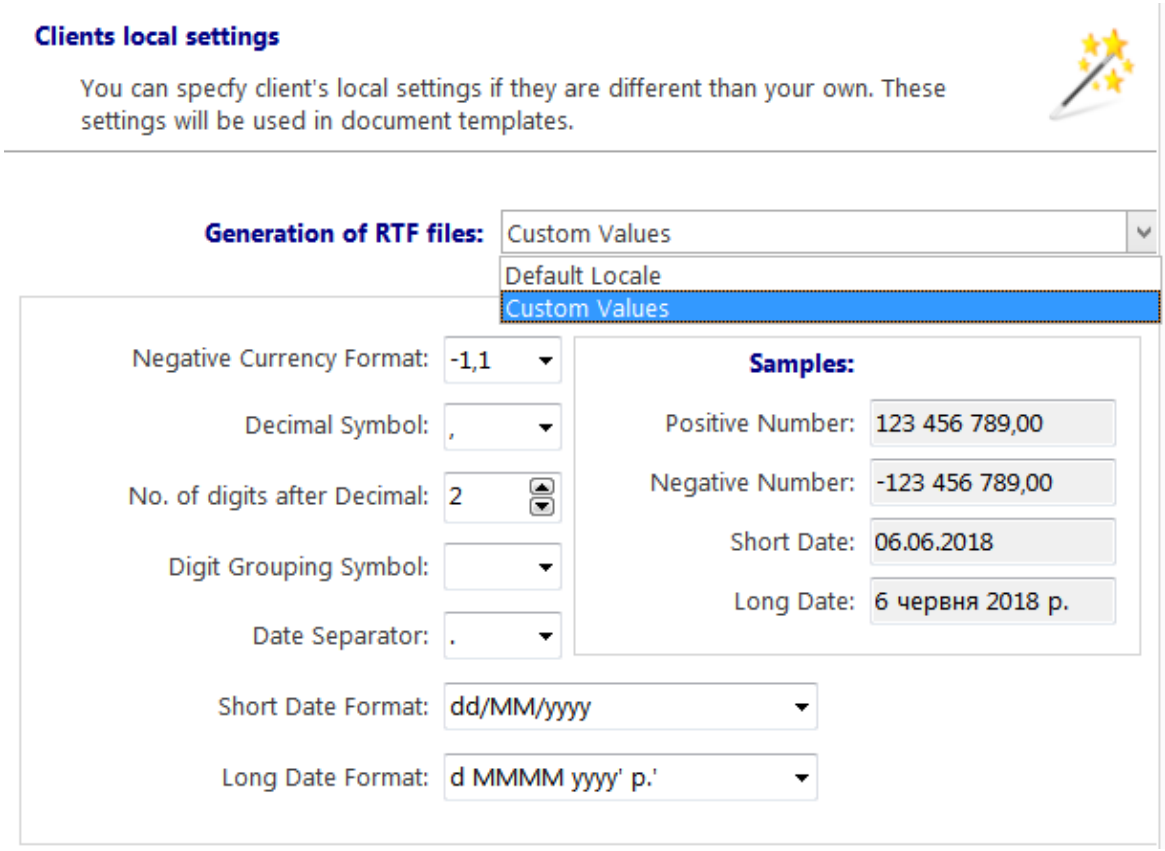
3. Enter the client's Postal address data (street address, city, country, zip code). This and all subsequent steps are optional and can be skipped.

4. Enter the contact details (e-mails, phones, fax, Web-site).

5. Adjust the financial details (client's currency, VAT number, payment and invoicing terms)



6. Confirm or adjust the client's locale settings.



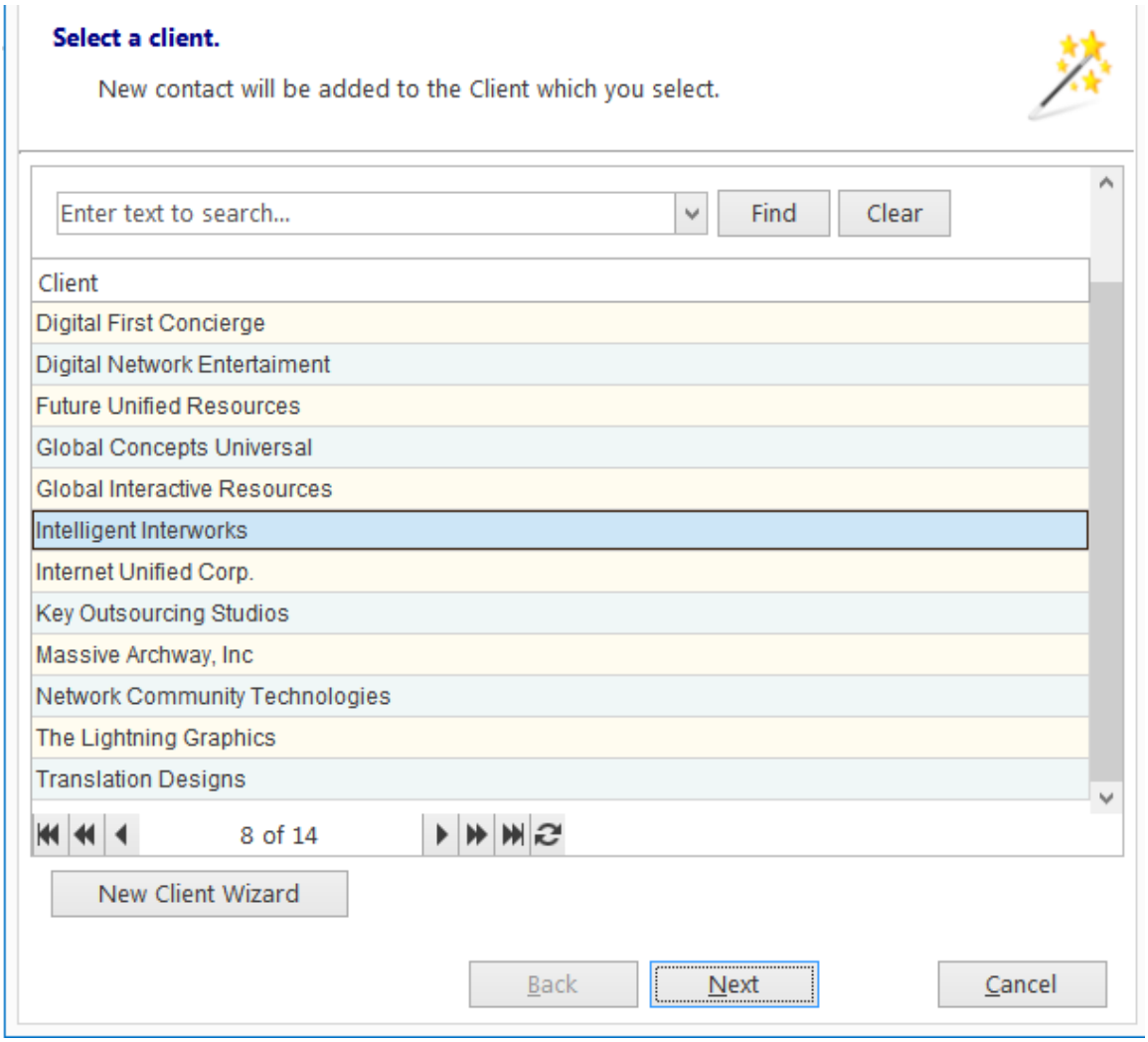
7. Enter any General information about the client.

8. Enter data into the client's custom fields (if any). Click **Finish** to create the new client.

8.2. Contact Wizard

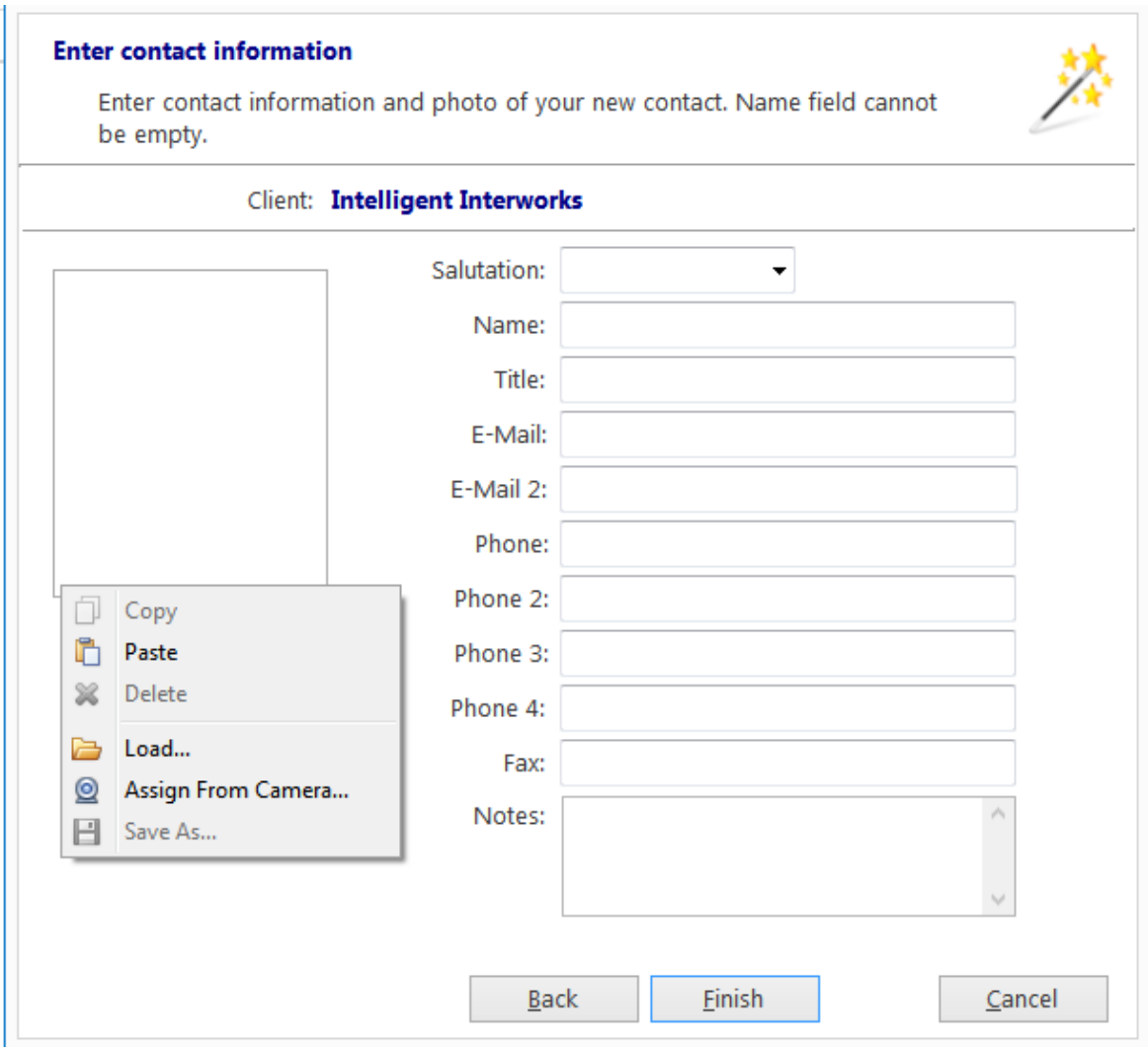
This wizard can quickly add new contact person records to Clients. The process has 2 steps:

1. Select the client for which you want to create a new contact person record.



You can open the New Client Wizard from this window as well.

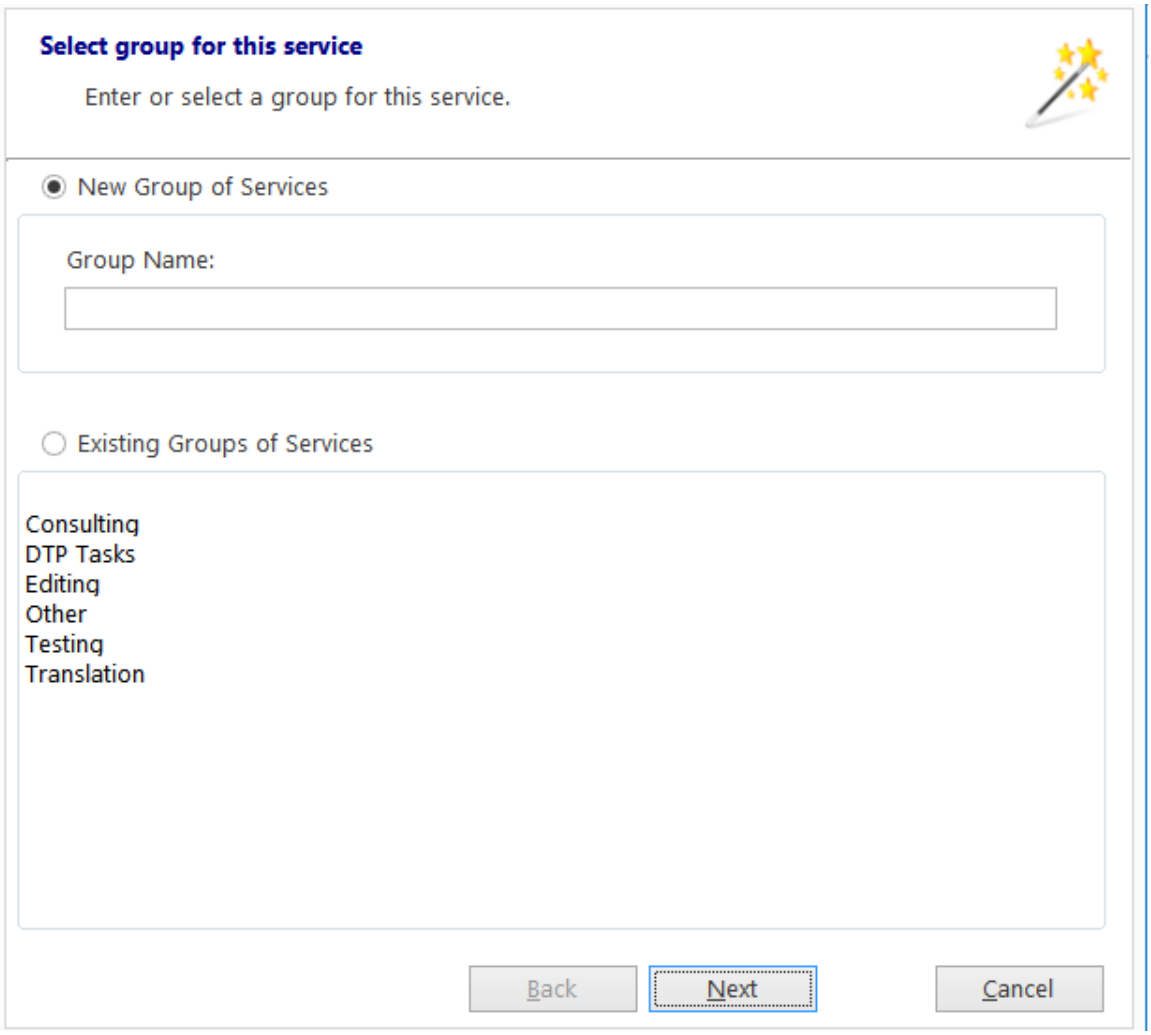
2. Enter the personal and contact data of the contact. You can also add a photo.



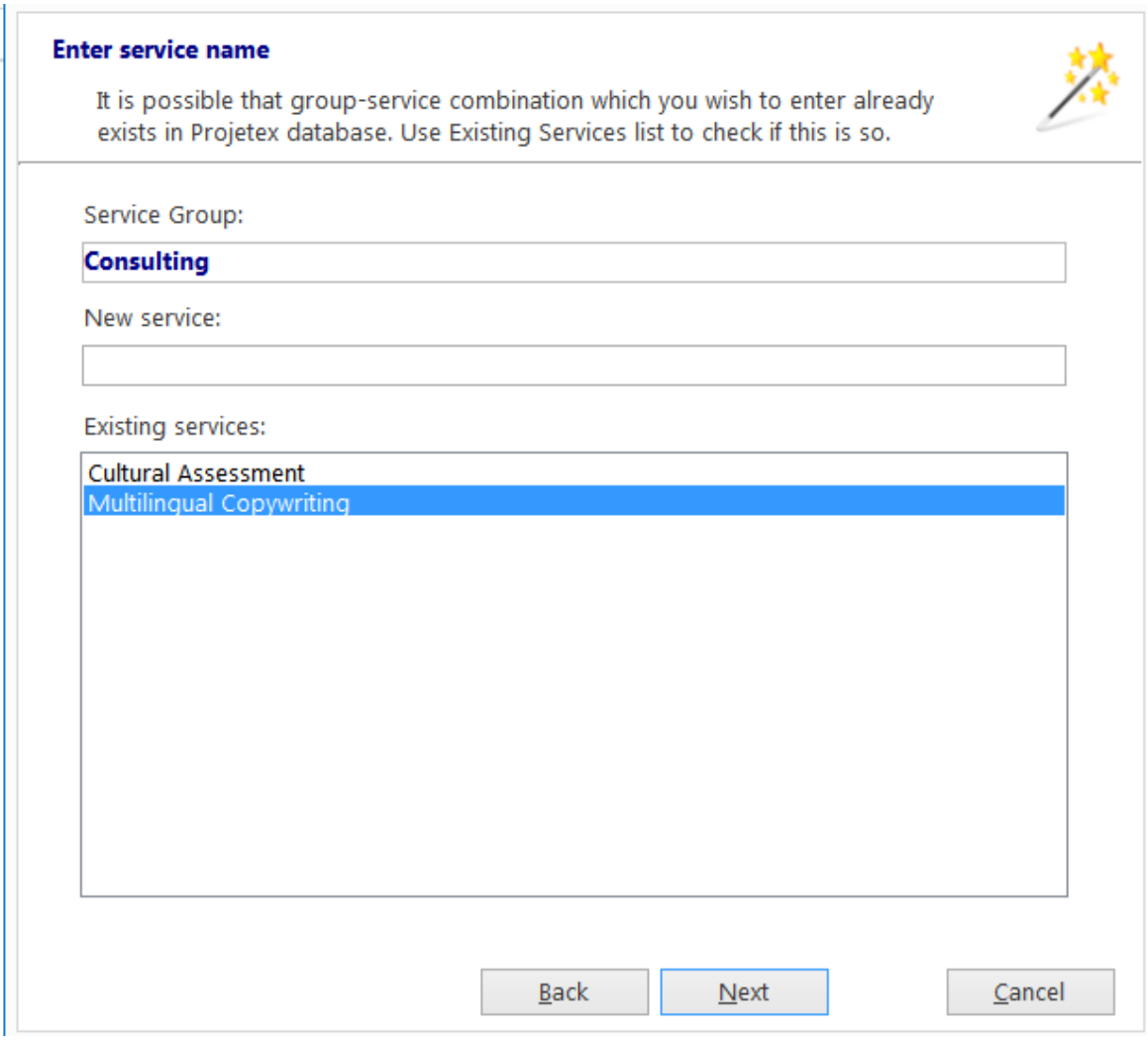
8.3. Service Wizard

This wizard can quickly create new services and add their base prices to the price lists. the process consists of 3 steps:

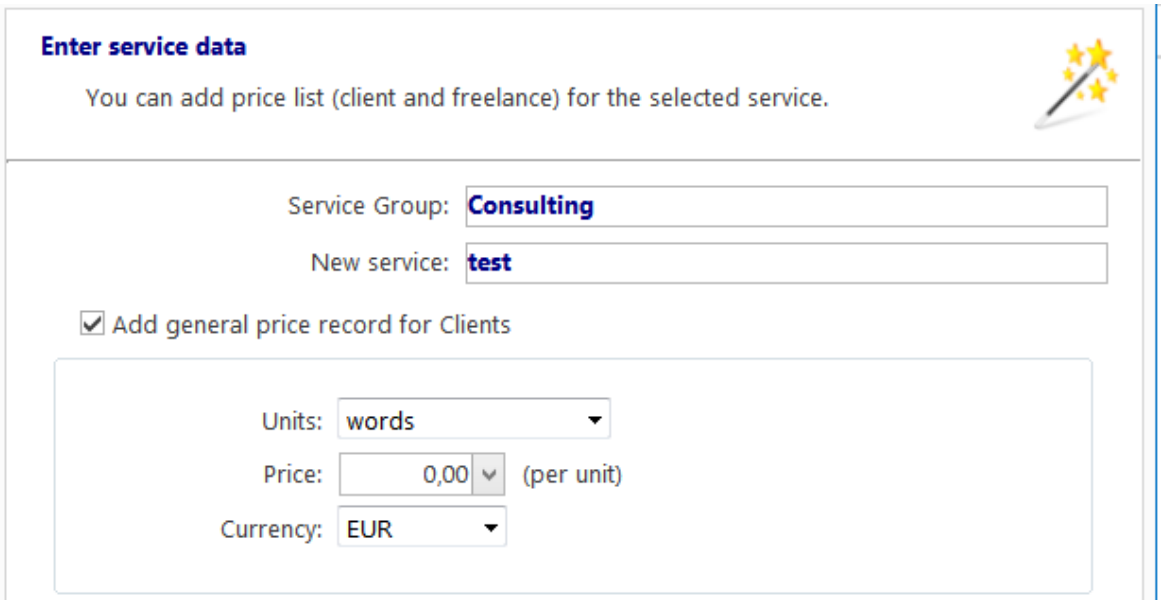
1. Create a new Service group or select an existing group.



2. Enter the name of the new service. Check against the list of existing services to avoid duplicates.



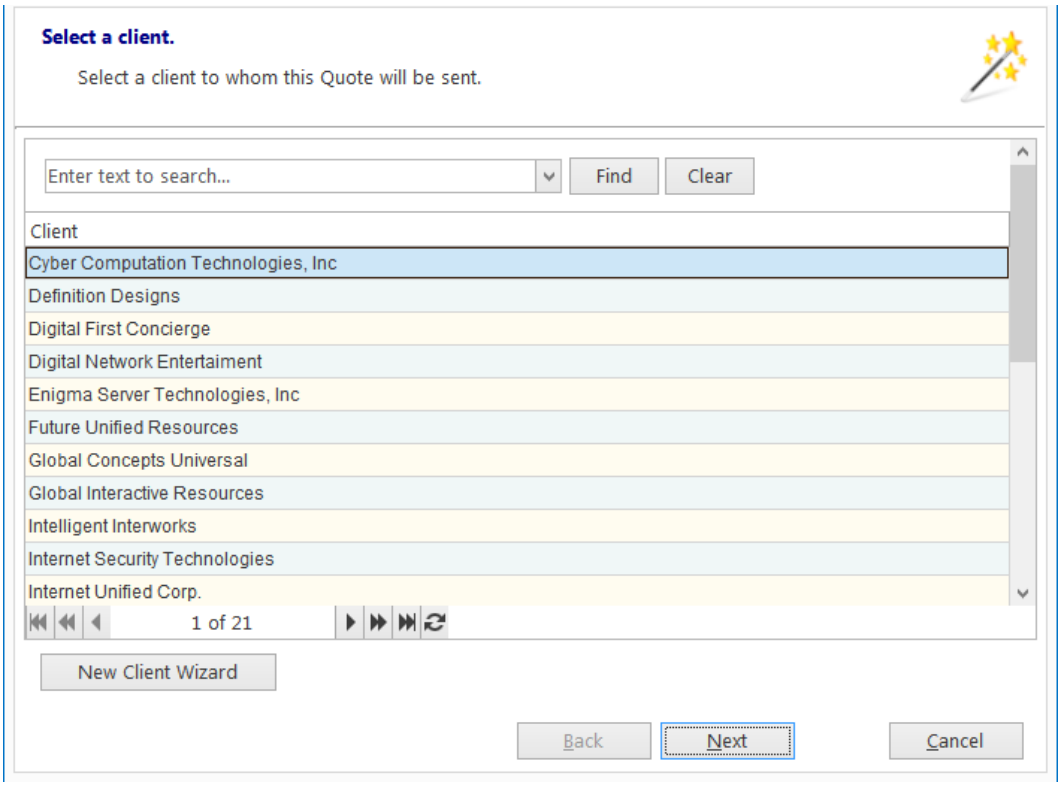
3. Set the General price of the service (if necessary), selecting the currency, unit, and per-unit price for each.



8.4. Quote Wizard

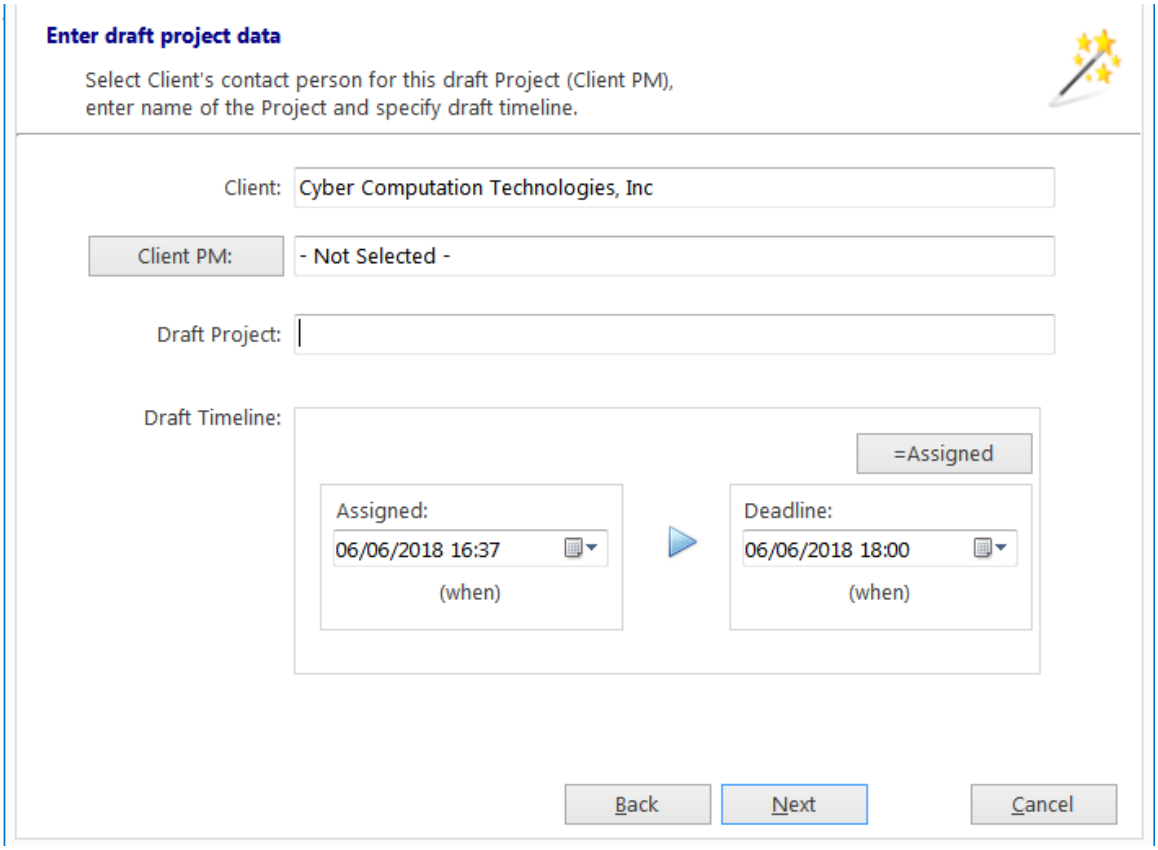
This wizard can quickly create new quotes. The process has 3 steps:

1. Select the client for which you want to create a new quote.

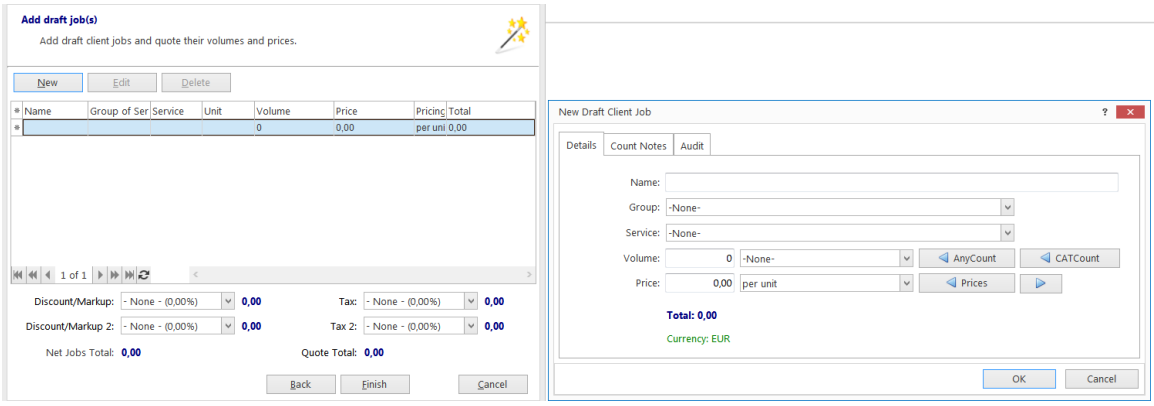


You can open the New Client Wizard from this window as well.

2. Enter the basic quote data (name, client PM, and timeline)



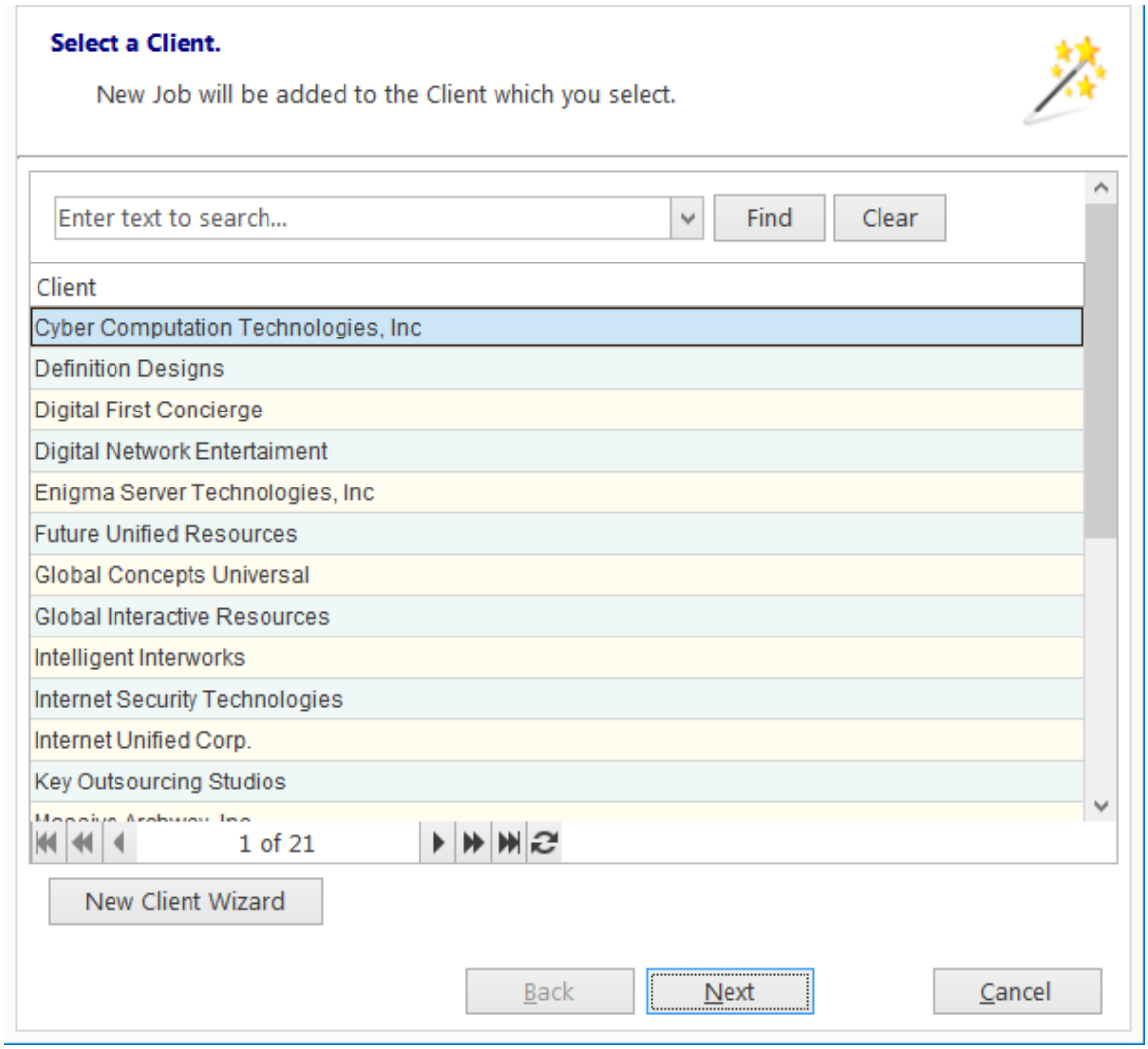
3. Create the quote's Draft Jobs (see Draft client Job for details). Select the Discounts, markups and taxes, if any.



8.5. Job Wizard

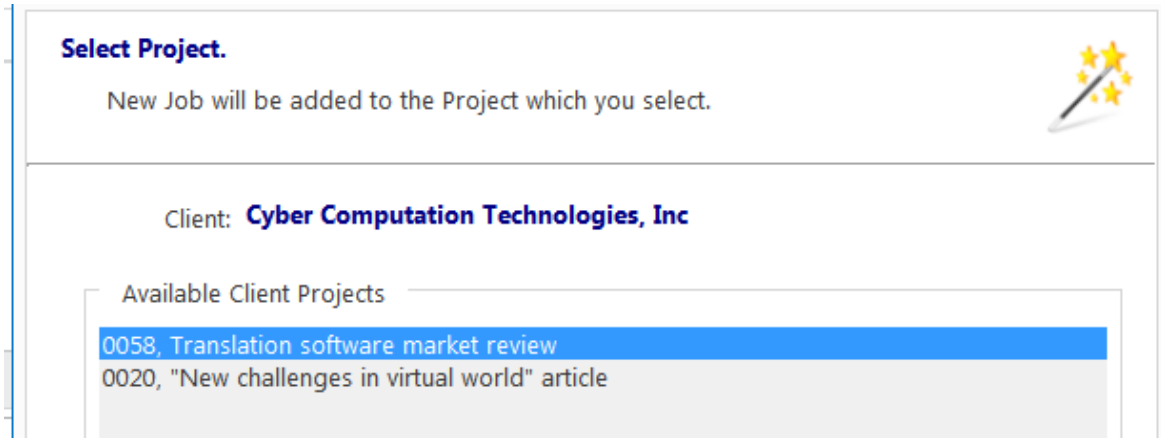
This wizard can quickly create new Client Jobs. The process has 2 steps:

1. Select the client for which you want to create a new Job.



You can open the New Client Wizard from this window as well.

2. (Only in With Projects mode) Select one of the client's existing projects.

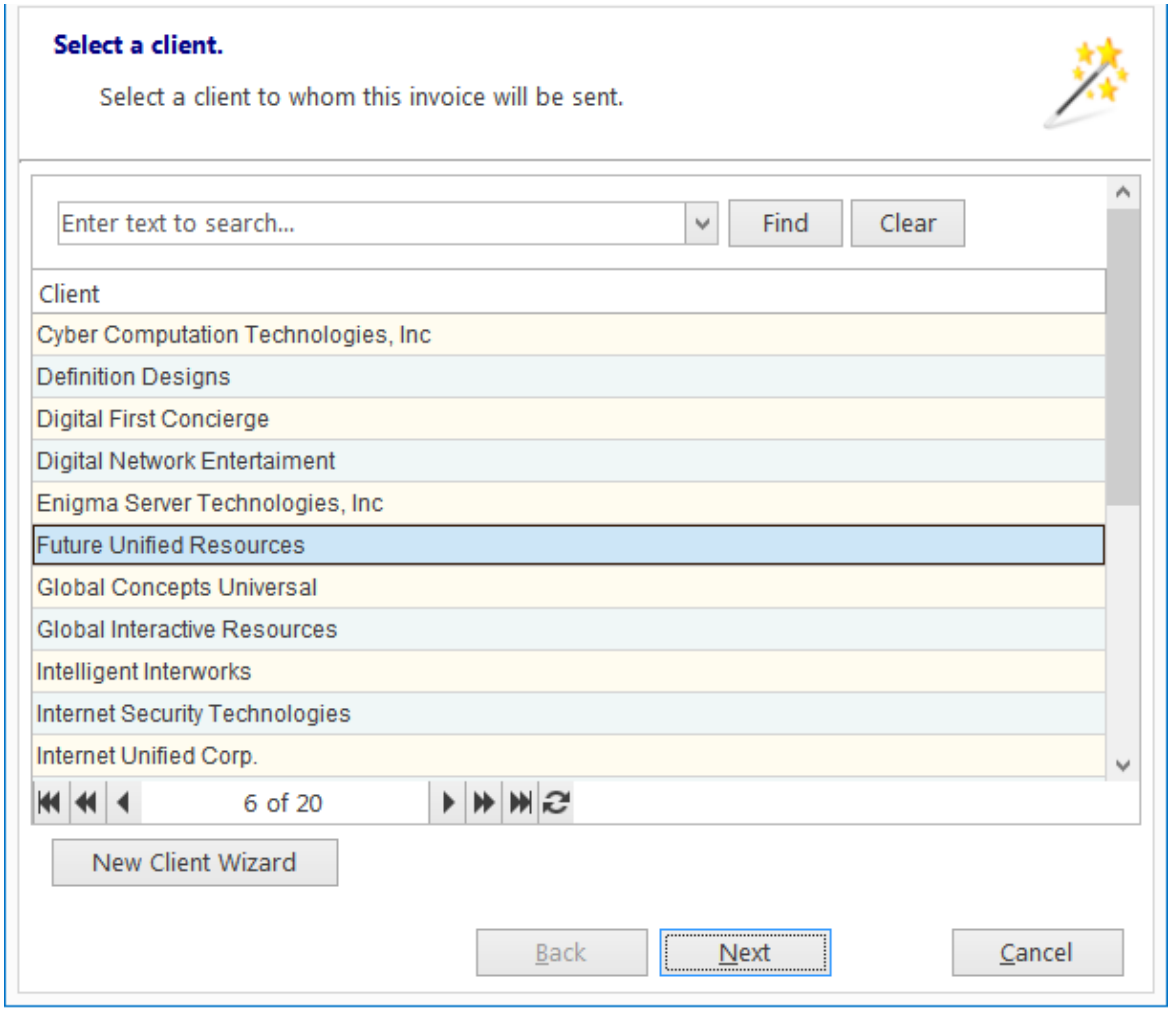


Once you click **Finish,** the New Client Job window will open and you will be able to enter the other details of the job.

8.6. Invoice Wizard

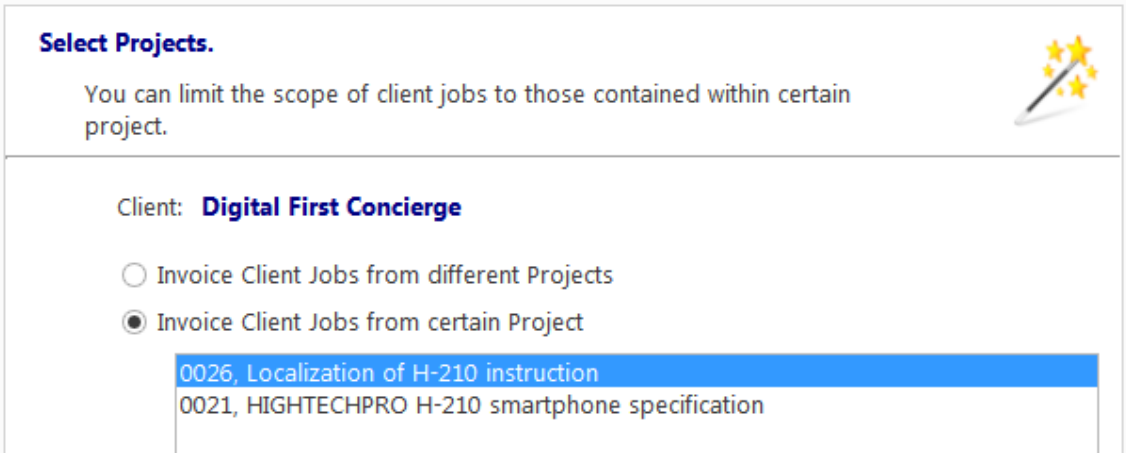
This wizard can quickly create new Invoices. The process has 2 steps:

1. Select the client for which you want to create a new Invoice.



You can open the New Client Wizard from this window as well.

2. (Only in With Projects mode) Select whether you want to add uninvoiced Jobs from all of the Client's projects, or from a specific project.



Once you click **Finish,** the New Invoice Window will open, with all uninvoiced jobs added, and you will be able to enter the other details of the Invoice.

9. Calendars

Calendars for *clients* and ***projects*** in TO3000 3D+ can be used to obtain a visualized representation of work processes. Calendars provide a comprehensive view of project and job intensity at any given moment.

The following calendars are available in TO3000 3D+:

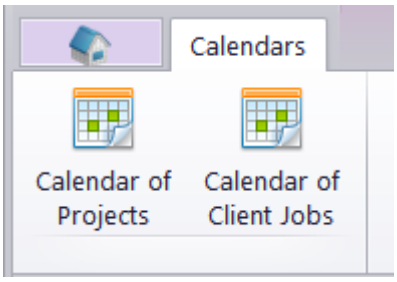
Clients	A calendar of projects for the selected client. — Calendar tab of Client window
Projects (*With Projects Mode* only)	**A Calendar** of client jobs for the selected project. — Calendar tab of Project Window
Calendars section	1. For *With Projects Mode*: **A Calendar** of all projects. 2. A Calendar of all client jobs.

Calendar Section

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 two different calendars in it, accessible from the **Ribbon**: a **Calendar of Projects,** and a **Calendar of Client Jobs.**

Each calendar displays the Jobs or projects for all clients. Double-clicking a calendar block opens the Edit window for the corresponding job or project.



Settings for the Calendar view

The following settings for the calendar page are available after opening a calendar:

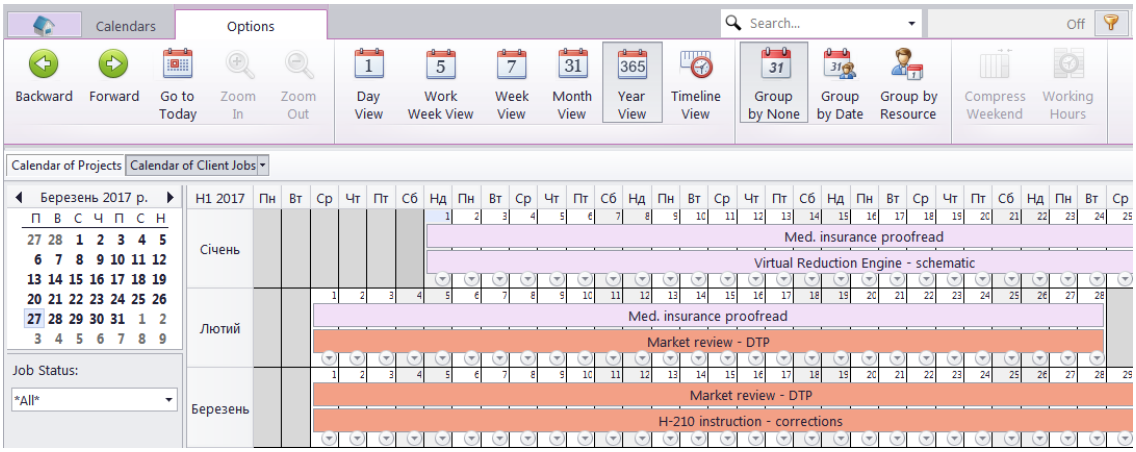
Basic navigation - the Ribbon displays icons for moving backward and forward in the calendar by a single interval, and quick navigation to Today.

Viewed period - the Ribbon displays icons for selecting the time interval to be viewed (day, work week, week, month, year), as well as the special Timeline View.

Note: In Day View and Work Week View, jobs shorter than one day are displayed across the rows representing hours, while longer jobs are displayed above the hour-rows.

Grouping and special options - the Ribbon displays icons for changing the layout of the viewed interval (**Group by None, Group by Date, Group by Clients**), 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 and drag across multiple days to display them all.



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

Blue — job/project is *not completed* and *due today*.

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

Grey — job/project is *canceled*.

Pale Pink — job/project is *completed*.

Pale green — job/project is *Heads-Up*.

Pale Orange — job/project is *On Hold.*

NOTE: To customize status colors in the **Backstage** select the User Settings section and click Colors: Statuses.

Use the **Job Status** filter to display only the Jobs/Projects with a specific status (Completed, Overdue, On hold, etc.).

10. Reports

10.1. Static reports

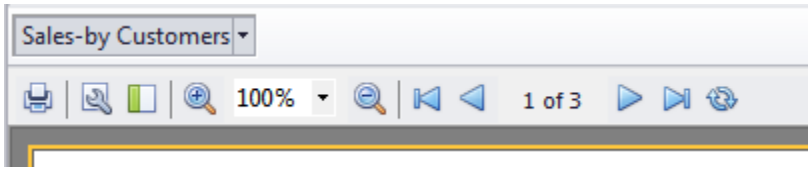
Static report templates are found in all tabs of the **Reports** section, except the 3D tab.

Each icon opens a specific template and automatically loads the required information into it before displaying it on screen.

Some reports require you to Select Conditions - choose the specific information to be entered into the template (e.g. a specific client).

Static reports that cover a certain time interval are affected by the Global Date Filter.

Static reports are displayed in a "ready to print" page-by-page view and the buttons just above the displayed report allow you to navigate the pages more easily and adjust their dimensions.



Print - sends the report as it is shown to the printer.

Page settings - allows you to adjust the dimensions, orientation and margins of the pages of the displayed report. Applying the changes often requires re-selecting display conditions.

Thumbnails - toggles a sidebar that displays thumbnails of all the pages in the displayed report.

Zoom Controls - set the portion of the reports visible on screen at a time.

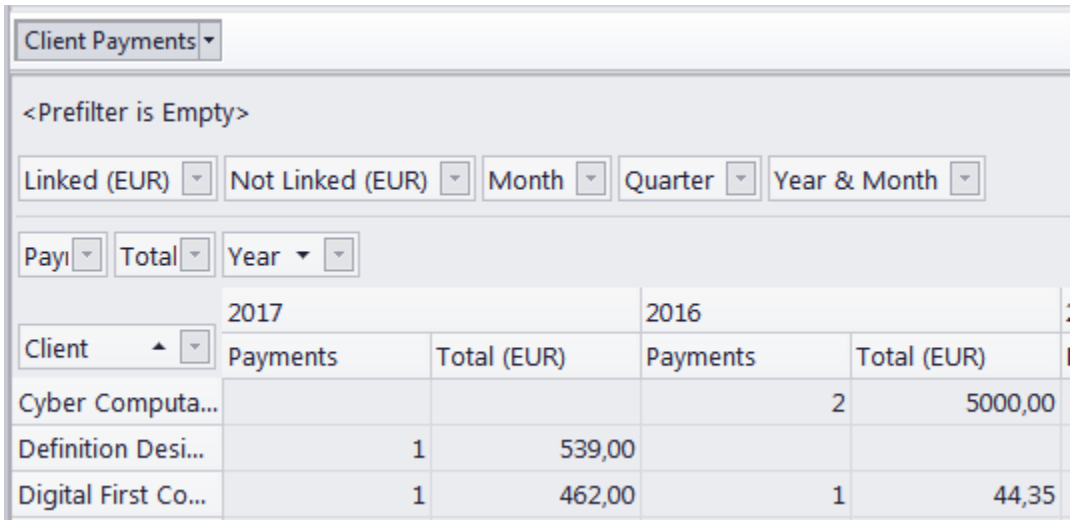
Page navigation - Quickly switch between adjacent pages, or jump to the start or end of the report.

Refresh - generate the report again to choose different conditions or keep the report up to date with the database.

New custom report templates will appear in the Custom tab.

10.2. Dynamic reports

The **3D** tab gives access to a number of dynamic reports: sets of fields that can be dragged and dropped onto a special "Pivot Grid" to quickly create an exportable report table.



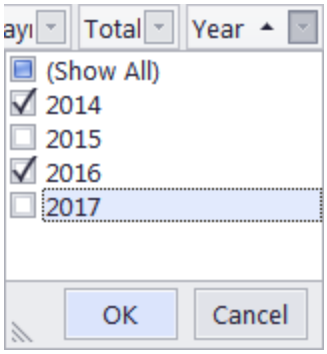
Prefilter

Use the prefilter to decide which information to include in the report to begin with. Click the Prefilter button to bring up the Filter Builder.

Pivot Grid

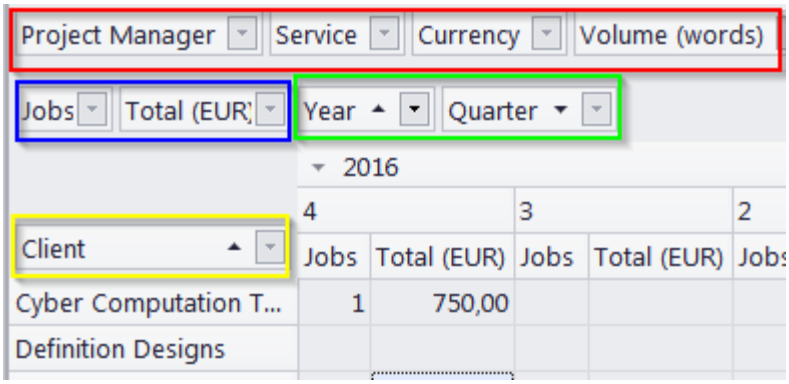
The pivot grid is the framework into which the fields can be dragged to customize the table.

Click the down arrow button in a field to select the entries which will factor into the report by the values of that field.



The grid consists of five areas:

- The Field List contains the fields that are not displayed in the main window. Right-click a field and select Hide to send it to the Field List. Display the Field list by right-clicking just above the table and selecting "Show Field List".
- Fields in the Filter Area (red box) do not appear in the table, but can be used for quick filtering.
- Fields in the Data Area (blue box) display their values in the cells of the table. If there is more than one field in the Data Area, they appear as sub-columns of the field in the Column Area.
- Fields in the Column Area (green box) split the data into columns according to their values. If there is more than one field in the Column Area, the columns are grouped with a left-to-right hierarchy and can be expanded or collapsed by clicking the arrow next to the left field's value.
- Fields in the Row Area, (yellow box) split the data into rows according to their values. If there is more than one field in the Row Area, the rows are grouped with a left-to-right hierarchy and can be expanded or collapsed by clicking the arrow next to the left field's value.

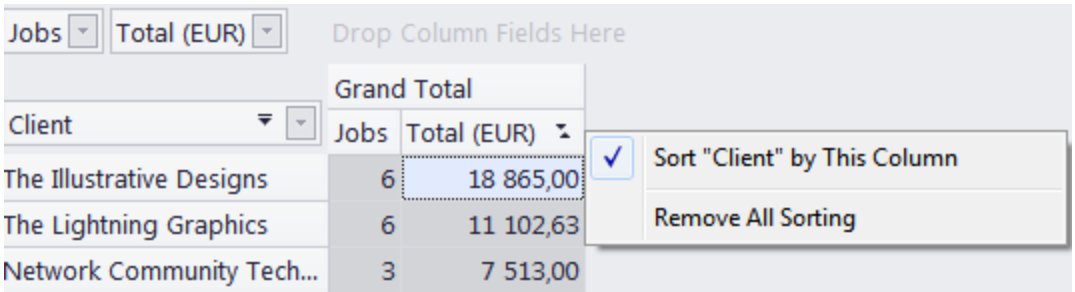


Sorting

By default, the table is sorted by the fields in the Row and Column Areas. Click the fields to switch between ascending and descending sorting.

You can also sort the table by the value of a specific row or column by right-clicking the column's header and selecting **Sort... by This Row/Column.**

Select **Remove All Sorting** to return to the default sorting method.



11. Knowledgebase

11.1. Info tab

The Knowledgebase is a repository of guides, manuals, and other reference material.

The **Info** tab of the Knowledgebase consists of two panes.

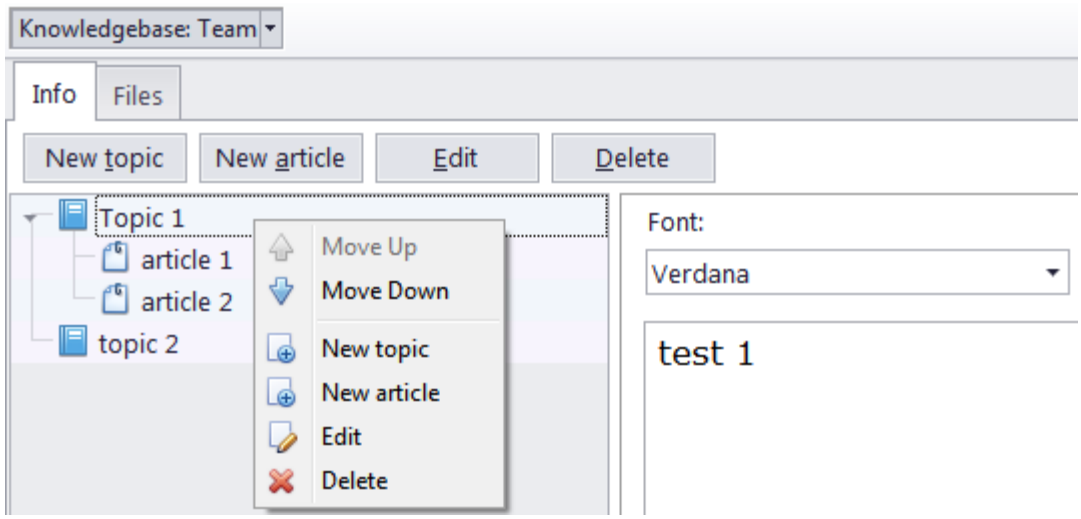
The left pane displays all the topics and articles in the knowledgebase, and the right pane displays the contents of the currently selected topic or article.

New Topic creates a new topic in the knowledgebase.

New Article creates a new child article in the selected topic.

Edit allows the user to change the Subject and Information in the selected topic or article. Note that the information can also be edited directly in the right pane.

Delete removes the currently selected topic or article. note that a topic can not be deleted if it has at least one article inside it.



Click the arrow next to the topic symbol to display or hide the articles inside the topic.

To move a topic up or down in the knowledgebase, or to move an article inside it's topic, right-click and select **Move Up** or **Move Down**.

You can also apply basic formatting to the contents of a topic or article (font, size, style, color, etc.) and paste images into it.

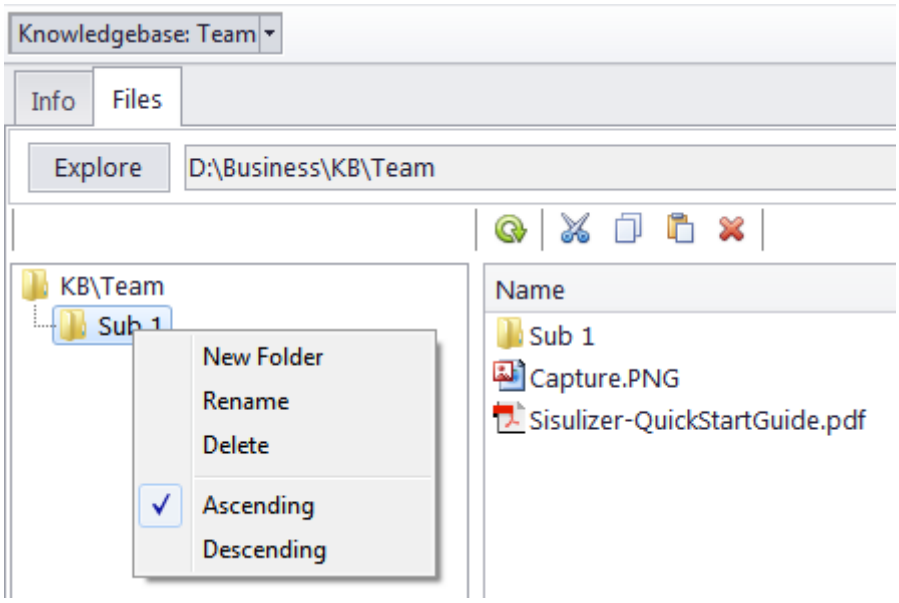
11.2. Files tab

The TO3000 knowledgebase has a dedicated folder where all useful reference files can be stored.

By default, the knowledgebase folders are found in C:\Business\KB.

The Files tab allows for easy management of such files. The tab shows the folder tree for the knowledgebase folder and the content of the currently selected sub-folder.

New subfolders can be created by right-clicking any existing folder in the tree view and selecting "**New folder**"



The Common file options buttons above the files list can be used to perform standard operations with selected files and folders. Left to right, these are **Refresh, Cut, Copy, Paste, Delete**.

12. Mail sender

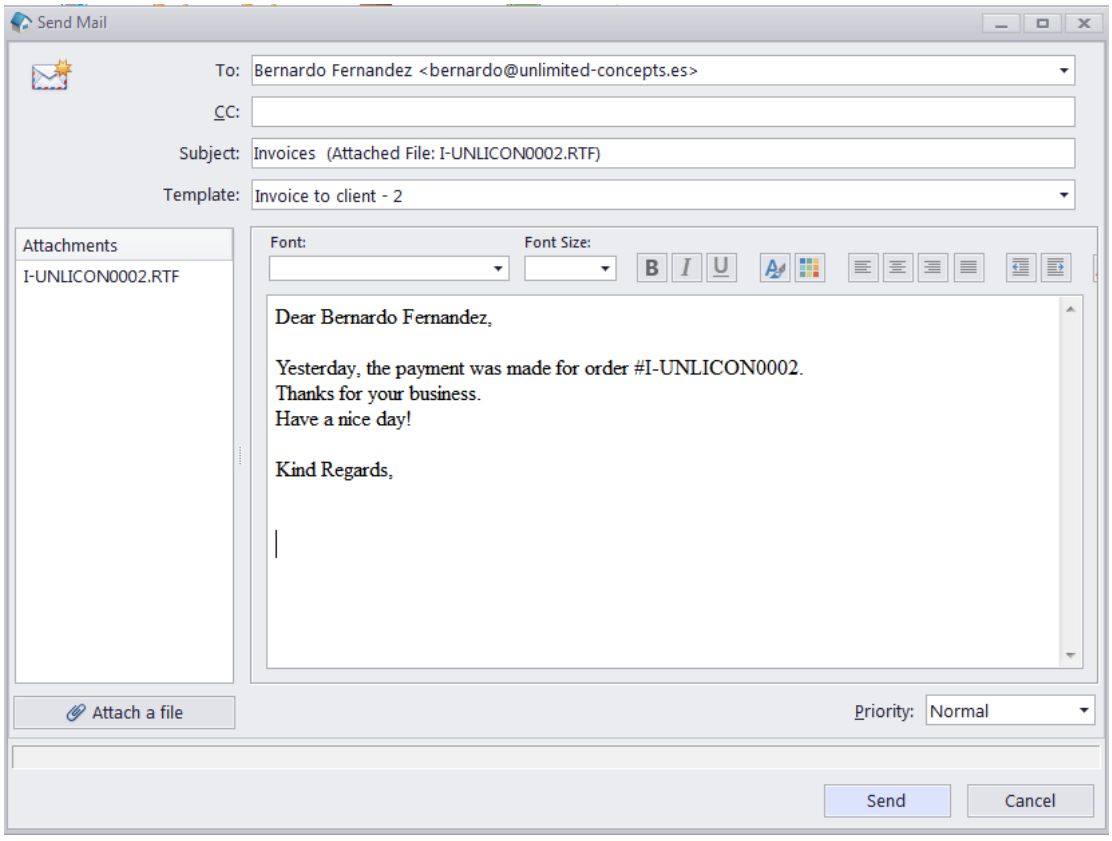
Use the TO 3000 **Mail Sender** to quickly create template-based documents and send them to your clients and experts without using an outside e-mail client.

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

The Mail Sender opens with the template-based document already attached, the subject line containing the name of the table and attached file, the default e-mail template for this type of document applied, and addressed to the client/expert associated with the document.

You can select a different email template or write your own text in the body, change the address and subject, add CC addresses, attach more files and set the letter's priority.

Click **Send** to send the email to all the selected addresses.



13. File management

13.1. Folder structure

Business Folder

TO3000 3D+ automatically creates and maintains a file storage folder structure at any accessible location.

All workflow files (such as *client-sent files* and *files to be sent to clients*, as well as printable *invoices* and *quotes*) are stored in respective subfolders of the *Business folder*.

The Business folder is created, by default, in the root of drive *C*.

To specify a different business folder location:

1. Click Advanced Settings in the Backstage view;

2. Click the **Folders** section;

3. Click the **Change** button.

Having changed the *Business folder* location you must move the content from the old *Business folder* manually.

Different folder types

Business folder contains three main sub-folders: The *Clients, Projects, and Prospects* folders.

Client folders (a separate folder for each client) are stored in the *Clients* folder. Each folder is named with the client's **Code**. Please refer to the Client folder topic for details.

Prospect folders (a separate folder for each prospect) are stored in the *Prospects* folder. Each folder is named with the prospect's **Code**. Please refer to the Prospect Folder topic for details.

Project folders (a separate folder is created for each project, *With Projects Mode* only) are stored in the *Project* folder. Each folder name contains the unique ***project code***, **and, optionally, the** project name. Please refer to the Project folder topic for details.

Client job folders (a separate folder is created for each client job, *Without Projects Mode* only) are stored in the *Client* folder. Each folder name contains the unique ***client job code***.

These folders, as well as their subfolders are created automatically when opened in the TO3000 explorer for the first time, or when the first file is saved to them.

Automatic folder creation

With the help of the automatic folder creation feature for any folder in TO3000 3D+ you can define a number of subfolders to be automatically created upon creation of their parent folder.

To enable this feature for a certain folder type, select the **Automatic Folder Creation** checkbox on the tab of required folder in the **Folders** section of the **Advanced settings** window.

Every time a *Client* or *Project* folder is created by TO3000 3D+, any folders or subfolders added to the respective tab of the **Folders** settings will be created in that folder automatically.

To disable creation of customized folders, clear **Automatic Folder Creation** on the corresponding Folders tab.

13.1.1. Client Folder

The Client folder is a storage location for all files relevant to a particular client. This folder is created with the help of the **Main** and **Files** tabs of the **Client** window.

The following subfolders are created automatically in the *Client* folder, depending on the document being saved:

- *Prices* – contains all printable price-lists for the current client.
- *Quotes* – contains all printable quotes for current client. Each quote has it's own sub-folder, named with its code.
- *Invoices* – contains all printable invoices for current client.
- *Credit notes* – contains all printable Credit notes for current client.
- *Payments* – contains all payment printouts of the current client.
- *Refunds* – contains all printable refunds for current client.
- *Jobs* - contains all printable documents related to jobs. In *Without Projects Mode* the Jobs folder contains all of the client's jobs files. See more information at Client Jobs Folder.

Each client folder can contain custom subfolders which will be created automatically together with the client folder. These subfolders can be specified on the **Folders section** of the **Advanced settings** window.

13.1.2. Prospect Folder

Prospect folder is a storage location for all files relevant to a particular prospect. This folder is created with the help of the **Main** and **Files** tabs of the **Prospect** window.

The following subfolders are created automatically in the *Prospect* folder, depending on the document being saved:

- *Prices* – contains all printable price-lists for current prospect.
- *Quotes* – contains all printable quotes for current prospect. Each quote has it's own sub-folder, named with its code.
- *Invoices* – contains all printable invoices for current former or inactive client.
- *Credit notes* – contains all printable Credit notes for current former or inactive client.
- *Payments* – contains all payment printouts of the current former or inactive client.

- *Refunds* – contains all printable refunds for current former or inactive client.
- *Jobs* - contains all printable documents related to jobs. In *Without Projects Mode,* the Jobs folder contains all of the former or inactive client's jobs files.

Each prospect folder can contain custom subfolders which will be created automatically together with a prospect folder. These subfolders can be specified on the **Folders section** of the **Advanced settings** window.

13.1.3. Project Folder (With Projects Mode only)

The primary purpose of every *Project* folder is to serve as a storage location for all files relevant to a particular **Project**. It can be created from the **Main** and **Files** tab of the **Project** window. It is created automatically when any project-related document is saved.

By default, a project's folder contains at least three subfolders:

- Incoming (where you can store the files sent to you by the c***lient***)
- Work (where you can store files while working on them)
- Outgoing (where you can put files ready to be sent to the c***lient***)

Each project's folder can contain custom subfolders which will be created automatically. These subfolders can be specified on the **Folders section** of the **Advanced settings** window.

All c***lient jobs*** are stored in project folders, not in clients' folders. However, having opened the **Files** tab of **Client** window, you can quickly browse through project folders of this client, using the **Shortcuts** interface. Similarly, the client folder of the respective client can quickly be opened from the **Files** tab of the **Project** window.

For consistency, the name of the project's folder is the same as the ***project code*** (the default value) and cannot be modified manually. The name of the project folder can include other info as well.

Project folder name

The way *Project* folders are named can be customized with in the **Folders section** of the Advanced settings window. The name of each *Project* folder can consist of the following components:

Project code (obligatory)

Project name

Click the **Update Folders** button to apply changes to the names of all *Project* folders, created before. This feature is available only for the names of project folders and does not have effect on other folder names.

13.1.4. Client Job Folder (Without Projects Mode only)

The primary purpose of every *Client Job* folder is to serve as a storage location for all files relevant to a particular **Client Job**. It can be created from the **Client Jobs** tab of the **Client** window. It is created automatically when any client job-related document is saved. *Client Job* folders are saved inside the Client/Jobs folder.

By default, a Client Job folder contains at least three subfolders:

•Incoming (where you can store the files sent to you by the ***client***)

•Work (where you can store files while working on them)

•Outgoing (where you can put files ready to be sent to the ***client***)

Each *Client Job* folder can contain custom subfolders which will be created automatically. These subfolders can be specified on the **Folders section** of the **Advanced settings** window.

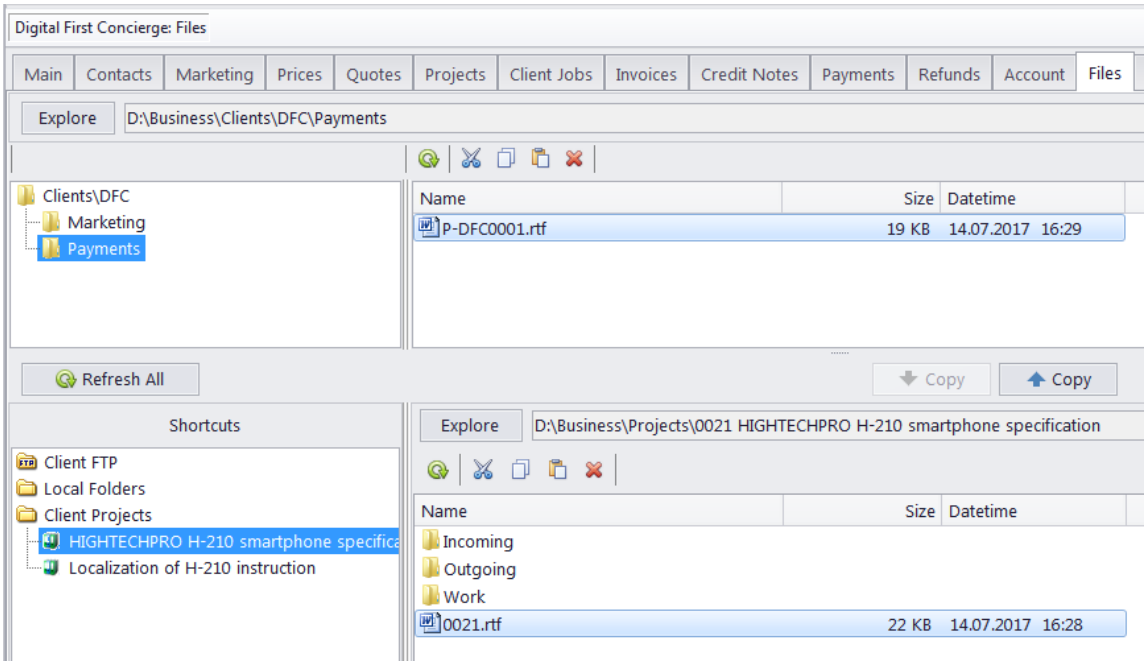
All ***client jobs*** are stored in the clients' folders.

For consistency, the name of the *Client Job* folder is the same as the *Client Job* ***Code*** (the default value) and cannot be modified manually.

13.2. File manager

13.2.1. Folders of certain Clients and Projects

Files of any particular *client* or *project* can be viewed with the help of the **Files** tab, available in each ***Main*** tab in TO3000 3D+. The file manager interface in this case has more options, like shortcuts/related folders and FTP access.



The upper field displays the tree structure of the folder being viewed on the left and the files inside the selected folder to the right.

The Explore button: click this button to open the currently viewed folder in Windows Explorer. The field to the right of the button displays the path to the selected folder.

The Common file options buttons above the files list can be used to perform standard operations with selected files and folders. Left to right, these are **Refresh, Cut, Copy, Paste, Delete**.

13.2.2. Shortcuts and Related Folders

Shortcuts and Related folders contain information relevant to the currently open folder. For example, while working with *project files* you might also need access to the Client folder, and vice-versa.

To quickly open a shortcut to the currently opened folder, select it in the **shortcuts** list in the bottom-left of the window.

The Client folder shortcuts are: the ***Project*** folders of this client's projects, and the *client's FTP connections*.

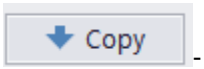
The Project folder shortcuts are: the ***Client*** folder of the selected project, and the *client's FTP connections*.

The shortcuts list can also be used to open any folder on the local machine, via the **Local Folders** shortcut.

Any folder selected in the Shortcuts list will have it's contents displayed to the right.

Files can be quickly exchanged between the currently open folder and it's shortcut using two special buttons:

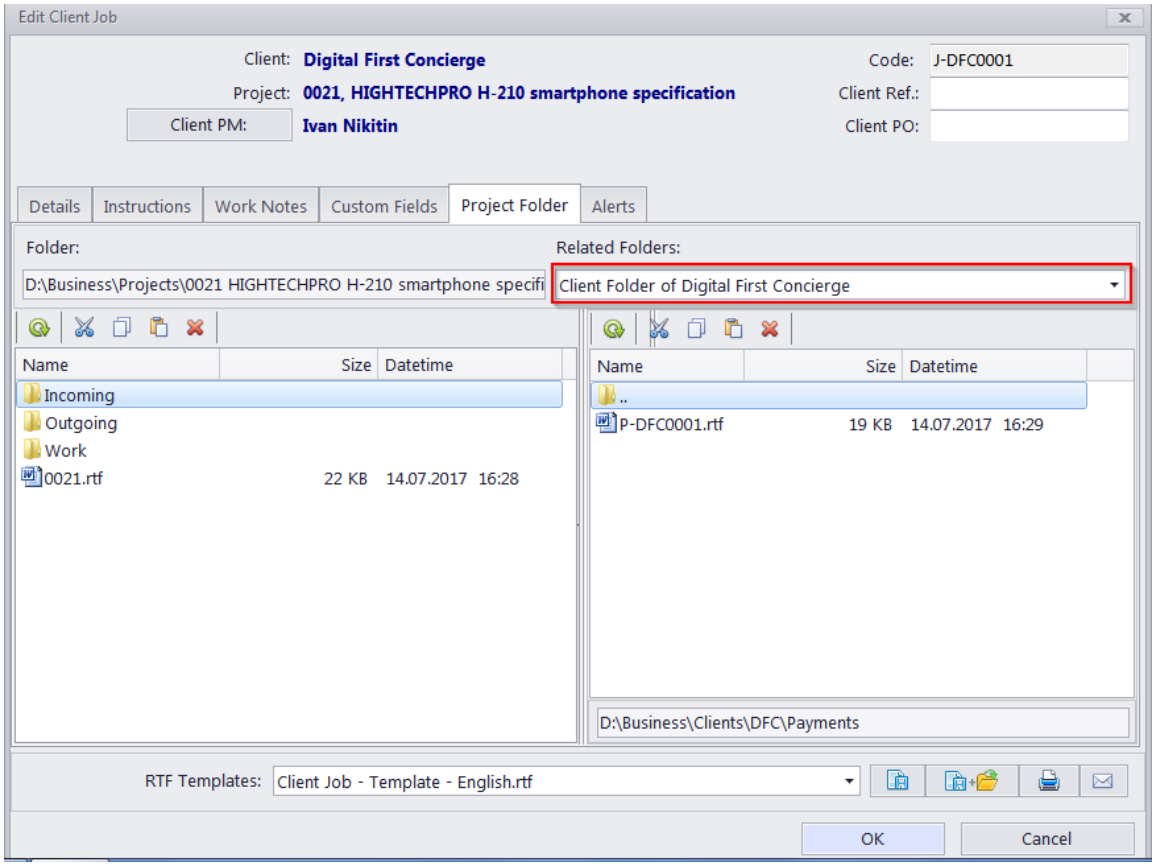
-

- copies the file "up" from the shortcut location to the selected sub-folder.
- 

- copies the file "down" from the selected sub-folder to the shortcut location.

NOTE: If you change the ***client* code** (it can be done from the **Main** tab of the **Client** window), TO3000 3D+ will attempt to rename the appropriate folder.

Related folders can also be accessed via the **Related Folders** drop-down list in the **Project Folder** tab of the **Edit Job** window.



Any option selected in the drop-down list will appear in a new field to the right.

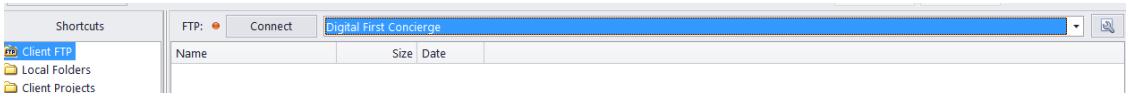
13.2.3. FTP folder access

TO3000 3D+ features a built-in *FTP client*, which can be used to quickly access the *FTP folders* of clients to upload or download workflow files.

To access the FTP client:

1. Open the **Files tab** of any client or project.

2. In the **Shortcuts** field select the **Client FTP** option.



FTP access interface

- **The FTP** indicator indicates the connection status. A red indicator is shown if there is no connection. The indicator turns green when a connection is active.
- Click the **Connect/Disconnect** button to connect/disconnect the currently selected FTP server in the nearby drop-down list.
- Click the **Manage Connection** button to create a new FTP connection or edit/delete the currently selected FTP connection.

Creating a new FTP Connection

In order to connect to the FTP folder you will need to create an **FTP Connection** for this folder, which implies entering the FTP server address and login information, which later will be used by TO3000 3D+ to log in to this FTP folder.

To create a new connection:

1. Click the **Manage Connections** button

2. Select **New connection ...** in the menu which appears:

3. Enter the name of the new connection, the FTP server's address, the user name (FTP login) and password (TO3000 3D+ will memorize your password)

4. Select any additional settings if you need to use them (Use passive transfer, FTP over SSL/TLS, Keep connection alive).

5. Click the **OK** button to create this FTP connection.

Connecting to FTP

Once the FTP connection has been created, it can quickly be activated with the help of the **FTP connections** drop-down list.

1. Select the required **FTP Connection** in the drop-down list to connect to that FTP server.

2. Click the **Connect** button to display the contents of FTP in the field below. The list and the Manage Connection button will become inactive while you are connected.

14. Multiple currencies support

In TO3000 3D+ you can assign an individual *c**lient currency*** to each *c**lient***, and still be able to see balance data in your *b**ase currency***. This chapter will help you to understand how currencies are handled in TO3000 3D+.

The *Base currency* is the currency in which your make all internal accounting records, i.e. balance, taxes, business expenses etc. In most cases, it is the currency of your country.

The *Client currency* is the currency in which you produce invoices for your client and receive payments from your client.

In TO3000 3D+ you can easily produce ***invoices*** and link them with ***payments*** from clients and record them in client currencies, and automatically make parallel records in your base currency.

These parallel records in your *b**ase currency*** allow conducting all your internal accounting in your *b**ase currency***, while still keeping the records in other currencies.

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

14.1. Base currency

The *base currency* represents your local currency, in which you prefer to record accounting information.

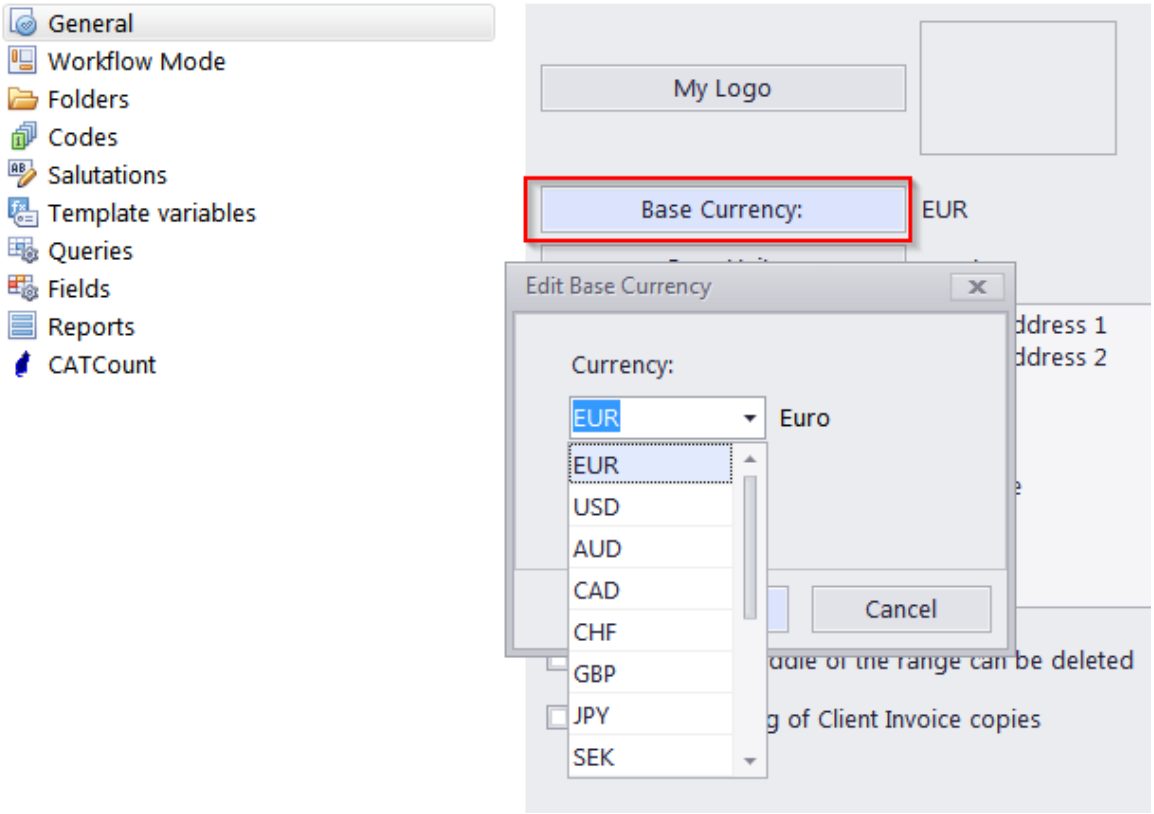
The base currency can be changed in the Advanced settings >> General window. To change your base currency:

•Click **Advanced Settings** in the **Backstage** view.

•Click the **General** section.

•Click the **Base Currency** button and select the necessary currency in the **Edit Base Currency** window. You will immediately be prompted to set the exchange rates to other currencies.

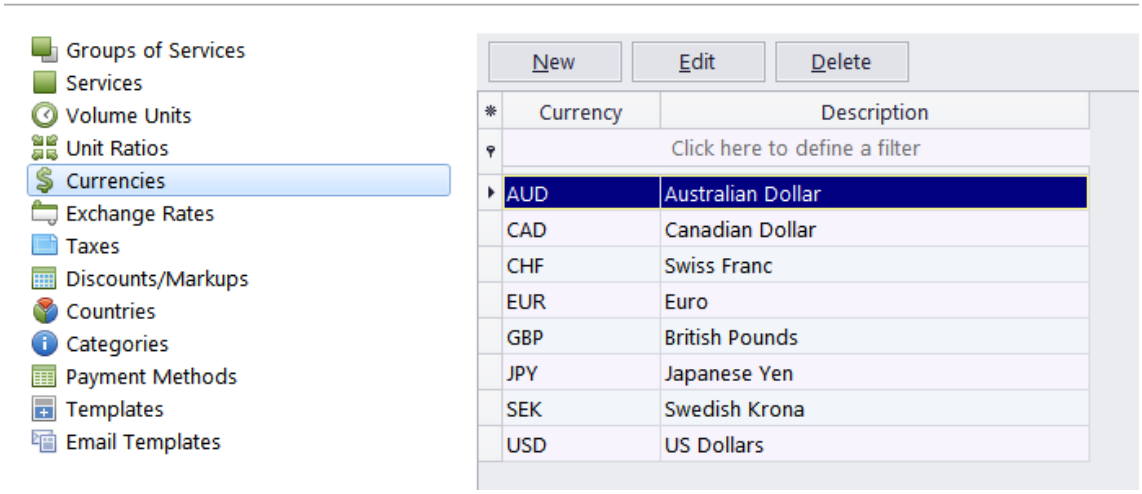
•Please make sure that the base currency is set to the correct currency before starting your work in TO3000 3D+.



14.2. Currencies and exchange rates

14.2.1. Adding new currencies

Since the currencies of your clients may be different from yours, you will need to add new currencies to your TO3000 3D+ database and to define their exchange rates relating to your base currency.



To define currency settings:

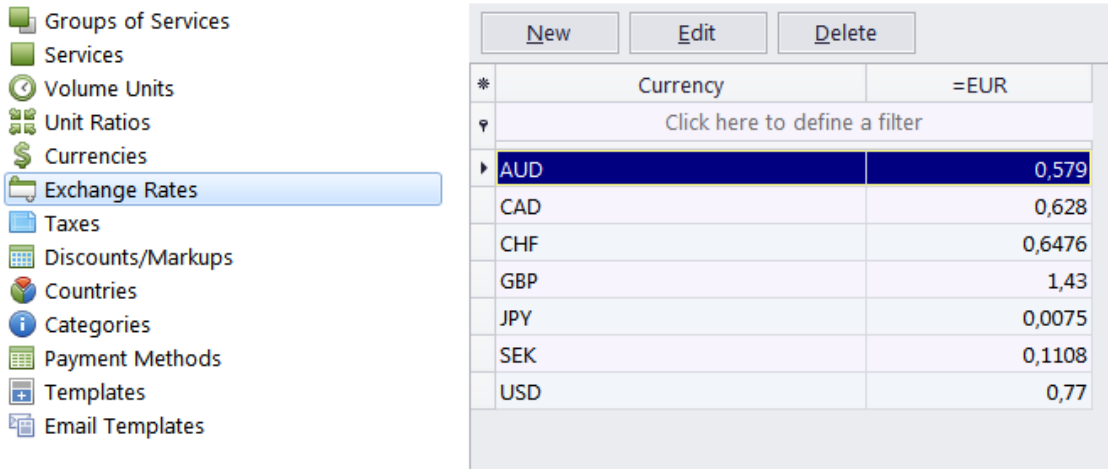
1. Click **Business Settings** in the **Backstage** view;

2. Click **Currencies**;

3. If some of the currencies you need are not included in the list, you may add them by clicking the **New** button. You can also edit or delete existing currencies.

14.2.2. Setting exchange rates

You can enter exchange rates between your *base currency* and any of the *client currencies*. Exchange rates of currencies are used for keeping parallel records in both the base currency and client currencies with no mismatch.



To enter an exchange rate:

1. Click **Business Settings** in the **Backstage** view.

2. Click **Exchange Rates**;

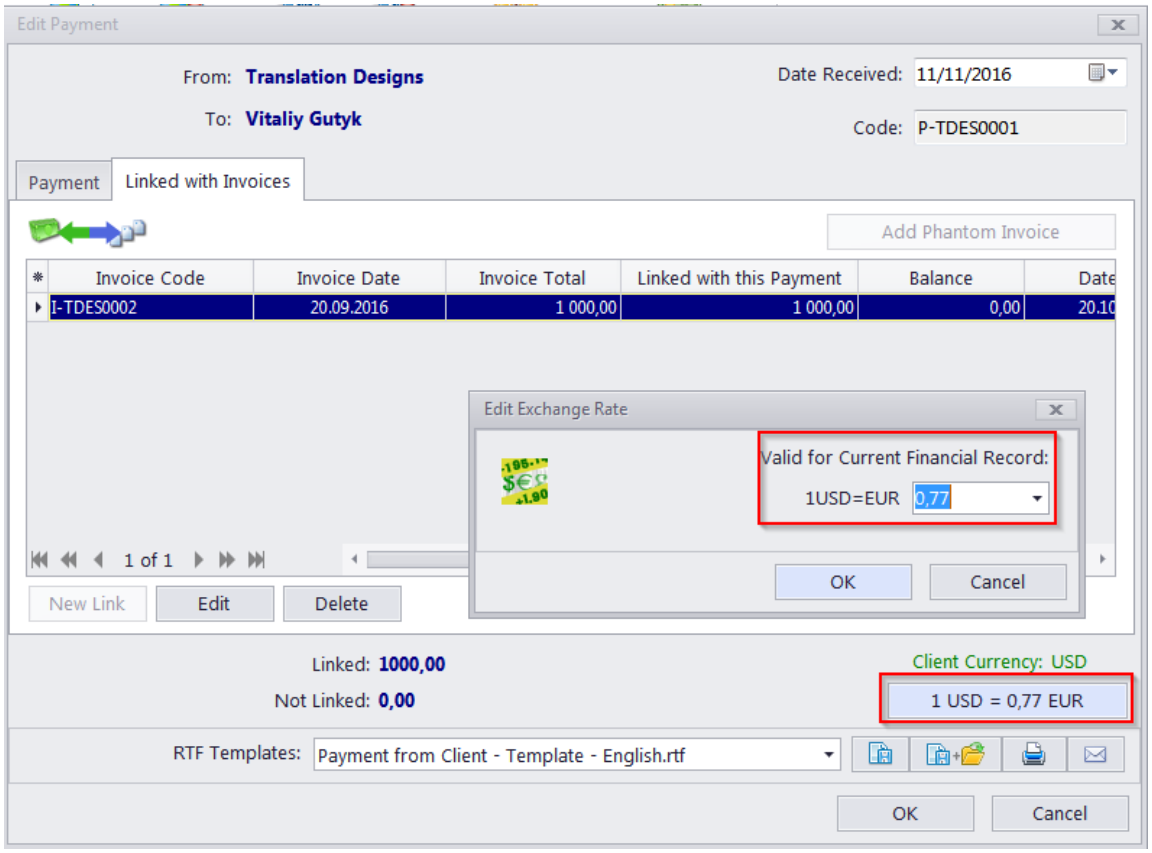
3. To add a new currency exchange rate, click the **New** button.

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

Editing exchange rates on individual records

New/Edit windows for most database records involving financial transactions (Quotes, Invoices, Payments, etc.) include a special button when the client's currency is different from your base currency.

The button displays the current exchange rate for the Client Currency and you can click it to edit the exchange rate for this specific record.

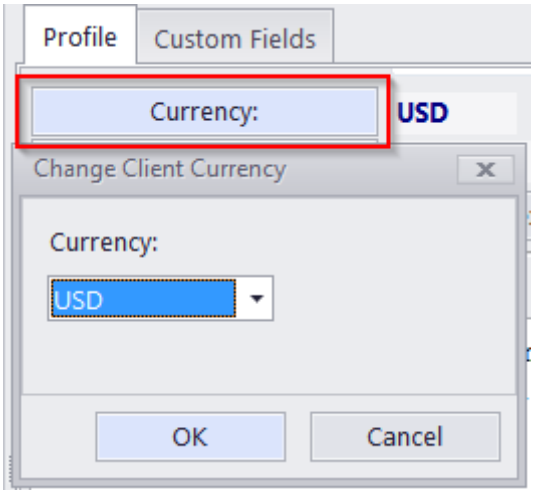


Client currencies

When you add a new ***client*** to your database, you define the ***currency*** of this ***client***. All the prices, quotes, invoices and payments related to the ***client*** will be recorded in the currency you defined.

NOTE: If you encounter a rare case when your transactions with a particular ***client*** involve more than one currency, you can create two separate ***client*** records, separate for each currency. This way this ***client*** will have two separate accounts in your database, one for each ***currency***.

Each client's currency can be changed on the **Main** tab of the **Clients** window by clicking the **Currency** button in the client's profile.



15. Templates

15.1. Templates in TO3000 3D+

Template is an *RTF* ("Rich Text Format") file stored in your TO3000 3D+ setup folder and used as a template when saving work flow documents in *RTF* (rich text format) or *PDF* (portable document format) files. RTF files can be opened with most text editors, including MS Word, and easily converted to more common .doc format.

15.1.1. Saving a document for printing

The following documents can be saved as printable RTF, PDF and DOC files using their own templates:

- Price lists
- Invoices
- Summaries of payments from clients
- Summaries of projects and client jobs
- Credit notes and refunds
- Quotes

Documents can be saved using windows **Edit Invoice**, **Edit Project** and so on, as well as **Prices** tabs of **Client/Prospect** window, and **General Prices for Clients/Prospects** window.

Any window which has RTF Templates section can be used to save its data in a printable document.

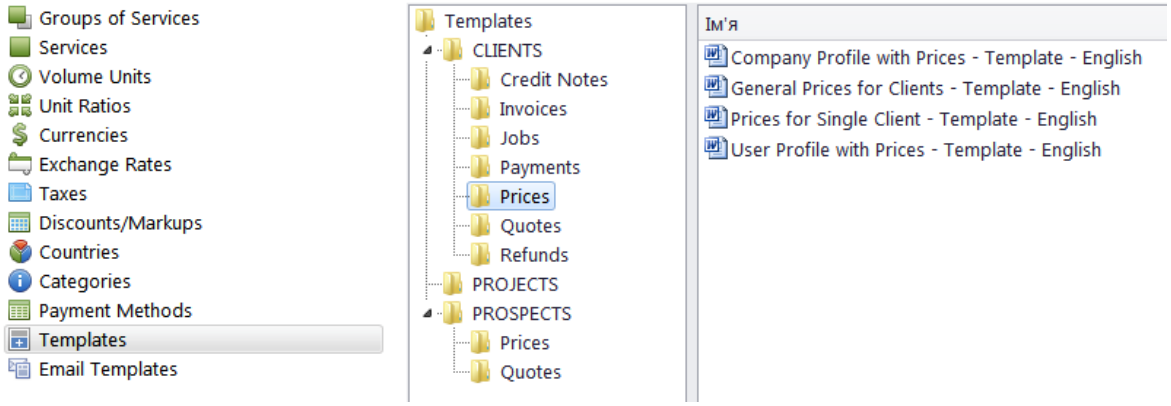
RTF template controls display a drop-down list, which can be used to select different templates.

- Use **RTF Templates** drop-down list to select the Template which must be used for saving the current document in an RTF file.
- Click **Save** button to save template in the respective folder.
- Click **Save&Open** button to open this document in your default text editor immediately after saving it.
- Click **Print** button to quickly send this document to printer.
- Click **Send Mail** to open the Mail sender with the template-based document already attached and ready to send.

Note: You can choose to save the output file in *RTF*, *PDF* or *DOC* format by selecting this format in **Save As** window with the help of **Save as type** drop-down list.

15.1.2. Template files

Each document type (like *invoices*, *purchase orders*, *quotes*, and so on) uses templates stored in specific folder, named by the document type, which templates it stores:



By editing template layout and format, you edit the layout and format of all the documents which will be saved with it. There can be a number of templates to choose from for one document type. Each RTF file in the template folders is considered a template.

15.1.3. Editing templates

Templates can be opened for editing using the **Templates** section of TO3000 3D+ **Personal settings**. To edit templates:

1. Click menu **Settings > Personal**.
2. Click **Templates** section of **Personal settings** window.
3. Locate the folder of the document, which templates you wish to edit.
4. Open required template file with text editor (MS Word or any other editor supporting RTF format).
5. After making all the necessary changes, save **Template** in the same or new RTF file of the same folder.

Note: Template folders can also be opened with regular file browser, like Windows Explorer.

15.1.4. Template Variables

Variable is a specific symbol combination which is entered in template files. When a document is saved using template, TO3000 3D+ recognizes the variable and inserts required data in the resulting document.

Variables are indicated with "\" (backslash) symbols in the beginning and in the end,

Example: \CLIENT_NAME\, \CLIENT_STREET1\, \CLIENT_PHONE1\ etc.

Each variable represents a portion of data which will be inserted in its place when the document is saved.

Note: Template can be edited without changing the variables wording and outlay (fonts and colors can still be changed). Advanced users can learn about templates variables; add/delete them as necessary, customizing templates to the maximum.

15.2. Logic and syntax of templates

15.2.1. Variables

All variables and commands can be identified by \ (backslash) symbol in the beginning and end. In example below you can see \CLIENT_NAME\, \CLIENT_STREET1\ and \CLIENT_PHONE1\ variables:

To: \CLIENT_NAME\

Address: \CLIENT_STREET1\

Phone: \CLIENT_PHONE1\

When you use this template by clicking on **Save** or **Print** in some dialog box, \CLIENT_NAME\ variable will be replaced by name of currently selected *client*, \CLIENT_STREET1\ — by *client's street address* and \CLIENT_PHONE1\ — by *client's phone number*. The final output will look like this:

To: XYZ Company

Address: Elm Street, 1

Phone: +1 212 898 11 31

Note: Numerical values sometimes are surrounded by fnum command. This command simply tells the parser to round up the value to specified number of digits after decimal point (2 digits in the example below):

Job Total:

\fnum(dtLinkJobs:TOTAL, 2)\

15.2.2. Data Scan commands

Another of RTF templates is **Data Scan** commands. These are used to create tables in which number of rows is determined by the number of records in database.

How to:

1. Begin by entering \scan(dtLinkJobs)\ command. This must not necessarily be dtLinkJobs, depending on the template, this can be:

- \scan(dtLinkJobs)\ — in *invoices*, templates, to display jobs included in invoice.
- \scan(dtLinkInvoices)\ — in *payment* templates to display invoices linked to the payment.
- \scan(dtLinkPayments)\ — in *invoice* templates to indicate linked sums.

2. Insert table header between \scan(dtLinkJobs)\ and \scanentry\.

3. Insert one row of data-columns after \scanentry\. Every variable in table must be preceeded with dtlink commfnd. For instance if the table begins with \scan(**dtLinkJobs**)\, each variable must have this link included: **dtLinkJobs**:JOB_NAME\, **dtLinkJobs**:COMPLETED\, and so on.

4. Insert \endscan\ after data-columns.

Note: Use noeof to hide table's header and footer if the table body appears to be empty. For instance, if your *invoice* includes only *jobs* and no *expenses*, the header and footer for *expenses* will not be saved/printed.

Example:

\scan(dtLinkJobs)\

PO No.	Delivered	Job Name	Service
\scanentry\			
\dtLinkJobs:PO\	\dtLinkJobs:COMPLETED\	\dtLinkJobs:JOB_NAME\	\dtLinkJobs:SERVICE\
\scanfooter\			

Jobs Total: \JOBS_TOTAL\

Command \scan(dtLinkJobs)\ will make the parser scan (go from first record to the last one) all selected data in **Jobs** table (in this particular case all *jobs* included in the *invoice*) and output them to file or printer.

Text between \scan(dtLinkJobs)\ command and \scanentry\ command is table header.

Text between \scanfooter\ and \endscan\ commands will be considered table footer and will only be displayed once at the end of this table.

Text between \scanentry\ and \scanfooter\ commands is table "body". It includes variables from columns which must be listed in the table. In example above these are:

- \dtLinkJobs:PO\ – Client PO Number.
- \dtLinkJobs:COMPLETED\ – Date of job delivery.
- \dtLinkJobs:JOB_NAME\ – Name of the job.
- \dtLinkJobs:SERVICE\ – Service provided.

15.2.3. Condition checking

This allows the template to react to certain varying conditions and produce output suitable to each of possible conditions. The logic is the following \IF(**condition**)\ **Reaction** \ENDIF\.

Example:

If *Discount 1* is applied, display *discount name*, *discount value* and *subtotal*. The code is as follows:

\IF(DISCOUNT1)

\DISCOUNT1NAME\: \DISCOUNT1VALUE\

Subtotal: \AFTERDISCOUNT1\\endif

This will make the template check if discount 1 is applied, and if so — display data between \IF(...)\ and \ENDIF\ commands.

- DISCOUNT1 is a logical variable, i.e. it can have one of two values: either true or false. In this particular case, TO3000 3D+ sets DISCOUNT1 into true if first discount is present and into false, if there is no first discount.
- When \IF(DISCOUNT1)\ is encountered in template, parser checks DISCOUNT1 logical value, and if it is true, runs the code below this command, until \endif\ is encountered, which instructs parser to stop. If DISCOUNT1 is false, everything until \endif\ command is skipped.
- In this particular case, without \IF(DISCOUNT1)\ command, the parser would output empty string with a colon symbol and an empty **Subtotal**: in cases when there would not be discount. But with \IF(DISCOUNT1)\ command, in such cases above block is skipped in its entirety.

15.3. Advanced Commands and functions

15.3.1. IF-ELSIF-ELSE-ENDIF

Format of the *IF-ELSIF-ELSE-ENDIF* construction is:

```
\If(Condition1)\

Reaction1

\elsif(Condition2)\

Reaction2

\else\

Reaction3

\endif\
```

Note: *If*\ and *endif*\ are the mandatory commands in this construction, *elsif*\ and *else*\ are an optional commands. The condition must be a variable with a boolean value. Such variables can have only two values: True or False.

Example:

Invoice template	Explanation
\If(INV_IS_PAID)\	If the invoice is paid (INV_IS_PAID=True), then
Invoice is paid	"Invoice is paid" is displayed in the produced invoice,
\else\	if invoice is not paid (INV_IS_PAID=False), then
Invoice is not paid	"Invoice is not paid" is displayed in the produced invoice.
\endif\	

or

Invoice template	Explanation
\scan(dtLinkJobs)\	If the invoice is paid (INV_IS_PAID=True), then
……..	
\scanentry\	"Invoice is paid" is displayed in the produced invoice,
……..	if invoice is not paid (INV_IS_PAID=False), then, if
\If(INV_IS_PAID)\	
Invoice is paid	(DTLINKJOBS:CJOB_ISCOMPLETED=true),
\elsif(DTLINKJOBS:CJOB_ISCOMPLETED	then "Invoice is not paid" is displayed in the produced invoice,
=true)\	if invoice is not paid (INV_IS_PAID=False) and if (DTLINKJOBS:CJOB_ISCOMPLETED=false), then
Invoice is not paid	
\else\	
Job is not completed	"Job is not completed" is displayed in the produced invoice.
\endif\	
\scanfooter\	
……..	
\endscan\	

15.3.2. IIF function

Function **IIF** returns one of the two values depending on the value of a logical expression. The syntax is: IIF(Logical_expr, Value1, Value2)

Invoice template	Explanation
\scan(dtLinkJobs)\ ... \scanentry\ ... \IIF(DTLINKJOBS:CJOB_ISCOMPLETED=true, 100,0)\ ... \scanfooter\ ... \endscan\	If the Client Job is completed (DTLINKJOBS:CJOB_ISCOMPLETED =true) then 100.00 is displayed in the produced invoice. If the Client Job is not completed (DTLINKJOBS:CJOB_ISCOMPLETED =false), then 0.00 is displayed in the produced invoice.

15.3.3. Numeric report functions.

ROUND - The Round function rounds a real-type value to an integer-type value. 0.5 is always processed to largest integer number. This is not a banker's rounding.

Invoice template	Explanation
\Round(JOBS_TOTAL)\	If Jobs Total is 504.49, then 504 is displayed in the produced invoice, If Jobs Total is 504.50, then 505 is displayed in the produced invoice.

INT - The INT function returns the integer part of a real number.

Invoice template	Explanation
\Int(JOBS_TOTAL)\	If Jobs Total is 504.49, then 504 is displayed in the produced invoice, If Jobs Total is 504.51, then 504 is displayed in the produced invoice.

15.3.4. SUM function

Function SUM can be used after *scan(dtLinkJobs)*\, *scan(dtLinkInvoices)*\ or *scan(dtLinkPayments)*\ to give to some new custom variable the value of the sum of the values in the defined field. The syntax is:

```
\scan(table1)\

\endscan, sum(field of the table1, variable1)\

Total: \variable1\
```

Invoice template	Explanation

`\scan(dtLinkJobs)\`
 	
`\endscan, sum(DTLINKJOBS:CJOB_TOTAL, V1)\`
 	
`Total: \V1\`
	Variable V1 is set to return the sum of client job totals anywhere in this invoice, just by entering \V1\ anywhere below in this invoice. If there are two client jobs in this invoice with totals of 345.00 and 678.00, then Total: 1023.00 will be displayed in the produced invoice.

15.3.5. CTN function

Function CTN can be used after *scan(dtLinkJobs)*\, *scan(dtLinkInvoices)*\ or *scan(dtLinkPayments)*\ to give to some new custom variable the value of number of data field entries with values <> 0. The syntax is:

```
\scan(table1)\

\endscan, ctn(field of the table1, variable1)\

Total: \variable1\
```

Invoice template	Explanation

`\scan(dtLinkJobs)\`
 	
`\endscan, ctn(DTLINKJOBS:CJOB_TOTAL, V1)\`
 	
`Number of Client Jobs: \V1\`
	Variable V1 is set to return the number of client jobs with totals that are <> 0 anywhere in this invoice, just by entering \V1\ anywhere below in this invoice. If there are three client jobs in this invoice with totals of 345.00, 678.00 and 901.00, then
	
	Number of Client Jobs: 3.00 will be displayed in the produced invoice.

15.3.6. NORESET option with SUM and CTN functions

NORESET option can be used with SUM and CTN functions to add the new values of the source field to the previous result of the function. The syntax is:

```
\scan(table1)\

........

\endscan, sum(field of the table1, variable1)\

\scan(table2)\

........

\endscan, sum(field of the table2, variable1,noreset)\

All totals: \variable1\
```

Invoice template	Explanation

`\scan(dtLinkJobs)\`
 	
`\endscan, sum(DTLINKJOBS:CJOB_TOTAL, V1)\`
 	
`\scan(DTLINKPAYMENTS)\`
 	
`\endscan, sum(DTLINKPAYMENTS: CPAYM_TOTAL, V1,noreset)\`
 	
`Total: \V1\`
	Variable V1 is set to return the sum of client job totals plus payment totals anywhere in this invoice, just by entering \V1\ anywhere below in this invoice. If there are two client jobs in this invoice with totals of 345.00 and 678.00 and one payment with total of 77.00 , then
	
	Total: 1100.00 will be displayed in the produced invoice.

For more details on Variables for each document type, see the chapters of "Available Template Variables".

It is recommended to begin with the Common Template Variables topic.

15.4. Locale settings and date format

There are two ways of configuring locale format:

1. In TO3000 3D+ (for each *Client* individually):

- open **Client/Prospect** window and click **Main** tab;
- click **Locale Format** button in client profile;
- select **Custom locale** in the drop-down list next to **Generation of RTF files:** string;
- configure the code in **Short Date Format** or **Long Date Format** to include 4-5 capital M letters (like *dd.MMMM.YYYY*).

Note: Please note that **Long Date Format** for "long" date variables: *DATE_DUE_LONG*\, *INVOICE_DATE_LONG*\, and so on. Settings in **Short Date Format** will affect regular variables, like *DATE_DUE*\, *INVOICE_DATE*\, and so on.

2. In Windows Control Panel (these settings are used as default in TO3000 3D+):

- open Windows Control Panel
- double-click **Regional and Language Options**
- click **Customize** button on **Regional Options** tab
- click **Date** tab
- configure long (or short) date format options to include 4-5 capital M letters (like *dd.MMMM.YYYY*). To remove day of the week from view, delete extra "d" letters, so that no more than 2 "d-s" are present in the code string.

15.5. Common template variables

There are four categories of common variables accessible in all templates:

- User information variables;
- Current date variables;
- Client information variables;
- Client currency variable.

15.5.1. User information variables

VARIABLE:	DESCRIPTION:
\USER_NAME\	Registration name taken from your License Key. It cannot be modified within program.
\USER_CURRENCY\	Company's Base Currency

15.5.2. Date variables

VARIABLE:	DESCRIPTION:
\DATE\	Date in short format (for example, 10/4/2006)
\DATE_LONG\ \LONGDATE\	Date in long format (for example, Monday, October 04, 2006)

15.5.3. Client information variables

This set is available in all templates where single *client* is known (all templates except Profile templates when used in **Master Profile**):

VARIABLE:	DESCRIPTION:
\CLIENT_NAME\	Name of client.
\CLIENT_CODE\	Code of client.
\CLIENT_CURRENCY\	Currency of client.
\CLIENT_MINFEE\	Minimum fee of client.
\CLIENT_PAYMENT_TERMS\	Payment terms of client.
\CLIENT_PAYMENT_TERMS_NOTES\	Additional notes on payment terms of client.
\CLIENT_ADDRESS\	Client address. This variable has pre-defined order. If address format is different in your country, you can use separate address items to include address into your customized template.
\CLIENT_STREET1\	Street address of client.
\CLIENT_STREET2\	Street address 2 (if available) of client.
\CLIENT_CITY\	City from client's profile.
\CLIENT_STATE\	State from client's profile.
\CLIENT_COUNTRY\	Country from client's profile.
\CLIENT_ZIP\	ZIP from client's profile.
\CLIENT_EMAIL1\	E-mail of client.
\CLIENT_EMAIL2\	Alternative e-mail 2 (if available) from client's profile.
\CLIENT_PHONE1\	Phone number of client from client's profile.
\CLIENT_PHONE2\	Alternative phone number 2 (if available) from client's profile.
\CLIENT_PHONE3\	Alternative phone number 3 (if available) from client's profile.

\CLIENT_PHONE4\	Alternative phone number 4 (if available) from client's profile.
\CLIENT_FAX\	Fax number from client's profile.
\CLIENT_WEB\ \CLIENT_WWW\	Web-site address from client's profile.
\CLIENT_MINFO\	Application information of client document was produced for.
\CLIENT_MWEB\ \CLIENT_MURL\	URL (Web tab address) for application submission / information.
\CLIENT_INFO\	General Information about the client from client's profile.
\CLIENT_VATNUM\	VAT Number of client from client's profile.

Note: \CLIENT_ADDRESS\ variable has pre-defined order. If address format is different in your country, you can use separate address items to include address into your customized template.

Usage of special comma-terminated variables \CLIENT_STREET1_C\, \CLIENT_STREET2_C\, \CLIENT_CITY_C\, \CLIENT_STATE_C\, \CLIENT_COUNTRY_C\, \CLIENT_ZIP_C\ is necessary if you would like parts of address to be separated by commas. You can as well insert commas directly into template but in this case unnecessary commas may appear even if some variable (like second line of street address) is left empty.

15.6. Date and time functions

In most cases database stores complete date and time. Certain commands can be used to customize the format of output date and time data (you may want to output only the *day* of the *week* or only the time etc.).

The following date and time functions can be used in all templates:

- fmdt
- wd
- date
- time

Note: These functions return value according to Regional and Language Options settings in your system. These options can be changed wit the help of your Windows Control Panel.

The same variable will be displayed in different way depending on the function used.

FUNCTION:	VARIABLE VALUE:	FUNCTION APPLIED:
fmdt	9/20/06 6:00 PM	Wednesday, September 20, 2006 6:00 PM
	9/20/06	Wednesday, September 20, 2006
wd	9/20/06 6:00 PM	Wednesday
	9/20/06	Wednesday
date	9/20/06 6:00 PM	09/20/06
	9/20/06	09/20/06
time	9/20/06 6:00 PM	6:00 PM
	9/20/06	(empty row)

Date and time functions are accessible in all templates and can be applied to:

- All variables from datasets which return date and time.
- All variables from the following table:

VARIABLE:	TYPE:	DESCRIPTION:
\PROJECT_DATE_STARTED\	Project template variable	Date when the *project* was started in following format: 9/20/2006.
\PROJECT_DATE_DEADLINE\	Project template variable	*Project* deadline in following format: 9/20/2006.
\PROJECT_DATE_COMPLETED\	Project template variable	Date of the *project* completion in following format: 9/20/2006.
\ASSIGNED\	Client Jobs template variable	Date when the *job* was assigned in following format: 9/20/2006.
\DEADLINE\	Client Jobs template variable	*Job* deadline in following format: 9/20/2006

\COMPLETED\	Client Jobs template variable	Completion date in following format: 9/20/2006.
\DONE\	Client Jobs template variable	Completion date in following format: 9/20/2006.
\START\ \ESTSTART\	Quotes template variable	Date assigned in following format: 9/20/2006.
\COMPLETION\ \ESTCOMPLETION\	Quotes template variable	Deadline date in following format: 9/20/2006.

Syntax

Date and time functions are added to the variable in the following way:

\function(VARIABLE)\

Example

To add wd function to \ASSIGNED\ variable from the *client jobs* template, change the variable syntax in the following way: \wd(ASSIGNED)\

The result will be the day of the week, when the *job* was assigned (e.g. Wednesday).

15.7. Project template variables (With Projects Mode only)

These variables can be used in Project templates, as well as in any job or job assignment templates.

VARIABLE:	DESCRIPTION:
\PROJECT_NAME\	Name of *project*.
\PROJECT_CODE\	*Project* code.
\PROJECT_CLIENT_NAME\	*Client project* created for.
\PROJECT_CLIENT_CODE\	*Client* reference number.
\PROJECT_INFO\	Information about the *project*.
\CLIENT_PM_NAME\	Client *project manager*

\PROJECT_DATE_STARTED\	Date when *project* was started in following format: 10/4/2006.
\PROJECT_DATE_DEADLINE\	*Project* deadline in following format: 10/4/2006.
\PROJECT_DATE_COMPLETED\	Date of *project* completion in following format: 10/4/2006.
\PROJECT_DATE_STARTED_LONG\	Date when *project* was started in following format: Monday, October 04, 2006.
\PROJECT_DATE_DEADLINE_LONG\	*Project* deadline in following format: Monday, October 04, 2006.
\PROJECT_DATE_COMPLETED_LONG\	Date of *project* completion in following format: Monday, October 04, 2006.

15.8. Contacts template variables

These variables are used in any template mentioning client's details.

VARIABLE	DESCRIPTION
\SALUTATION\ \SAL\ \CONTACT_SALUTATION\	For example: “Mr.”, “Ms.”, “Mrs.” etc.
\CONTACT_TITLE\ \TITLE\	*Contact* title.
\CONTACT_NAME\ \PM_NAME\ \ATTENTION\	*Contact* name.
\CONTACT_EMAIL1\	*Contact* email address.
\CONTACT_EMAIL2\	*Contact* email address 2 (if available).

\CONTACT_PHONE1\	*Contact* phone number.
\CONTACT_PHONE2\	*Contact* phone number 2 (if available).
\CONTACT_FAX\	*Contact* fax number.
\CONTACT_NOTES\	*Contact* notes.

15.9. Quotes template variables

Using variables of quote templates you can construct templates either for your reference or for sending to client by email or fax.

15.9.1. Common Quote Variables

VARIABLE	DESCRIPTION
\QUOTE_NAME\	Possible quote name.
\QUOTE_CODE\ \CODE\	Quote code.
\SERVICE\	Service name.
\REQUEST\	Request for quote.
\ANSWER\	Answer to request for quote.
\VOLUME\	Quote volume.
\PRICING\ \TYPE\	Quote type.
\PRICE\	Quote price.
\UNITS\	Quote units.
\TOTAL\	Quote total.

\DATE_SENT\ \SENT\	Date sent in following format: 10/4/2006.
\DATE_SENT_LONG\ \LONGSENT\	Date sent in following format: Monday, October 04, 2006.
\START\ \ESTSTART\	Date assigned in following format: 10/4/2006.
\START_LONG\ \LONGESTSTART\	Date assigned in following format: Monday, October 04, 2006.
\COMPLETION\ \ESTCOMPLETION\	Deadline date in following format: 10/4/2006.
\LONG_COMPLETION\ \LONGESTCOMPLETION\	Deadline date in following format: Monday, October 04, 2006.
\COUNT_NOTES\	CATCount notes.
\STATUS\	Status of quote (unknown, accepted, r ejected)

15.9.2. Taxes

VARIABLE	DESCRIPTION
\TAX1\	Indicates if the tax 1 has been added; used in algorithms (If tax 1 exists = True, if it doesn't = False)
\TAX1_NAME\	Tax 1 name
\TAX1_PERCENTS\	Tax 1 value in percents
\TAX1_VALUE\	Tax 1 value in client's currency
\TAX1_VALUE_BASE\	Tax 1 value in base currency
\TAX2\	Used in algorithms (If tax 2 exists = True, if it doesn't = False)
\TAX2_NAME\	Tax 2 name

\TAX2_PERCENTS\	Tax 2 value in percents
\TAX2_VALUE\	Tax 2 value in client's currency
\TAX2_VALUE_BASE\	Tax 2 value in base currency
\TAXES\	Indicates whether the taxes in Tax fields are set; used in algorithms (If any tax is set = True, if it they are not = False)
\AFTER_TAX1\	Total in client's currency after Tax 1 applied
\AFTER_TAX1_BASE\	Total in base currency after Tax 1 applied

15.9.3. Discounts

VARIABLE	DESCRIPTION
\DISCOUNT1\	Indicates if the discount/markup in the Discount/Markup field is set; used in algorithms (If discount 1 exists = True, if it does not = False)
\DISCOUNT1_NAME\	Discount 1 name
\DISCOUNT1_PERCENTS\	Discount 1 value in percents
\DISCOUNT1_VALUE\	Discount 1 value in client's currency
\DISCOUNT1_VALUE_BASE\	Discount 1 value in base currency
\DISCOUNT2\	Indicates if the discount/markup in the **Discount/Markup** field is set; used in algorithms (If discount 2 exists = True, if it does not = False)
\DISCOUNT2_NAME\	Discount 2 name
\DISCOUNT2_PERCENTS\	Discount 2 value in percents
\DISCOUNT2_VALUE\	Discount 2 value in client's currency
\DISCOUNT2_VALUE_BASE\	Discount 2 value in base currency
\DISCOUNTS\	Indicates if the discounts/markups in the **Discount/Markup** fields are set; used in algorithms (If any discount is set = True, if there are no = False)

\AFTER_DISCOUNT1\	Total in client's currency after Discount 1 applied
\AFTER_DISCOUNT1_BASE\	Total in base currency after Discount 1 applied

15.9.4. Draft Client Job variables for Quotes to Clients

The following variables refer to draft client jobs, added to quote to client.

VARIABLE	DESCRIPTION
\DTMULTIQUOTEITEMS:QI_NAME\	Name of draft client job.
\DTMULTIQUOTEITEMS:GROUP_NAME\	Group of services of draft client job.
\DTMULTIQUOTEITEMS:SERV_NAME\	Service name of draft client job.
\DTMULTIQUOTEITEMS:UNIT_NAME\	Units in which draft client job volume is specified.
\DTMULTIQUOTEITEMS:QI_PRICE\	Price of draft client job.
\DTMULTIQUOTEITEMS:QI_VOLUME\	Volume of draft client job.
\DTMULTIQUOTEITEMS:QI_FEE_KIND\	Type of price set for client job (can be *per unit*, *flat fee*, or *free*).
\DTMULTIQUOTEITEMS:QI_TOTAL\	Draft client job total.
\DTMULTIQUOTEITEMS:QI_COUNTNOTES\	CATCount notes of draft client job (if job volume had been entered with the help of CATCount).

15.10. Client Jobs template variables

Variables for templates from **New/Edit Job** dialog box can be used to construct document templates either for your reference during work process or for confirming job details to client.

VARIABLE	DESCRIPTION
\JOB_NAME\	*Job* name.
\JOB_CODE\ \CODE\	*Job* code.
\PO_CODE\ \PO\	Purchase order *client* issued for this *job*.
\CLIENT_REF\	*Client* reference number in accounting system of *client*.
\SERVICE\	*Service* name.
\GROUP_NAME\	*Group of Services* name.
\INSTRUCTIONS\	*Job* instructions.
\WORK_NOTES\	Work notes.
\VOLUME\	*Job* volume.
\TYPE\	*Job* type (for example: per unit, flat fee, free)
\PRICE\	*Job* price.
\UNITS\	*Job* units.
\TOTAL\	*Job* total.
\ASSIGNED\	Date when *job* was assigned in following format: 10/4/2006.

\ASSIGNED_LONG\ \LONGASSIGNED\	Date when *job* was assigned in following format: Monday, October 04, 2006.
\DEADLINE\	*Job* deadline in following format: 10/4/2006.
\DEADLINE_LONG\	*Job* deadline in following format:
\LONGDEADLINE\	Monday, October 04, 2006.
\COMPLETED\ \DONE\	Completion date in following format: 10/4/2006.
\COMPLETED_LONG\ \LONGCOMPLETED\	Completion date in following format: Monday, October 04, 2006.
\COUNT_NOTES\	CATCount or AnyCount notes.
\INVOICE_CODE\ \INVOICE\	*Invoice* code.
\INVOICE_GLOBAL_CODE\ \INV_GLOBAL\	*Invoice* global code.

15.11. Invoice template variables

15.11.1. Date and code

VARIABLE	DESCRIPTION
\STATUS\	Invoice status (For example: “Expected within 30 days”, “Settled 5 days earlier” and so on.)
\DATE_DUE\ \SETTLEMENT_DATE\	Date when invoice is due in following format: 10/4/2006
\DATE_DUE_LONG\ \SETTLEMENT_LONGDATE\ \DUE_DATELONG\	Date when invoice is due in following format: Monday, October 04, 2006

\INVOICE_DATE\ \INV_DATE\	Date invoice sent in following format: 10/4/2006
\INVOICE_DATE_LONG\ \INV_LONGDATE\	Date invoice sent in following format: Monday, October 04, 2006
\INVOICE _CODE\ \INV_CODE\	Invoice code
\INVOICE _GLOBAL_CODE\ \INV_GLOBAL\ \INV_GLOBALLONG\	Invoice global code

15.11.2. Invoice totals

VARIABLE	DESCRIPTION
\INVOICE_TOTAL\	Invoice total *in client's currency*
\INVOICE_TOTAL_BASE\	Invoice total *in base currency*
\JOBS_TOTAL\	Jobs total *in client's currency*
\JOBS_TOTAL_BASE\	Jobs total *in base currency*
\NET_JOBS_TOTAL\	Jobs total with discounts *in client's currency*
\NET_JOBS_TOTAL_BASE\	Jobs total with discounts *in base currency*
\VOLUME_BASE\	Jobs total volume in base units

15.11.3. Taxes

VARIABLE	DESCRIPTION
\TAX1\	Indicates if the tax 1 has been added; used in algorithms (If tax 1 exists = True, if it doesn't = False)
\TAX1_NAME\	Tax 1 name
\TAX1_PERCENTS\	Tax 1 value in percents
\TAX1_VALUE\	Tax 1 value *in client's currency*
\TAX1_VALUE_BASE\	Tax 1 value *in base currency*
\TAX2\	Used in algorithms (If tax 2 exists = True, if it doesn't = False)
\TAX2_NAME\	Tax 2 name
\TAX2_PERCENTS\	Tax 2 value in percents
\TAX2_VALUE\	Tax 2 value *in client's currency*
\TAX2_VALUE_BASE\	Tax 2 value *in base currency*
\TAXES\	Indicates if the taxes in the Tax fields are set; used in algorithms (If any tax is set = True, if it they are not = False)
\AFTER_TAX1\	Total *in client's currency* after Tax 1 applied
\AFTER_TAX1_BASE\	Total *in base currency* after Tax 1 applied

15.11.4. Discounts

VARIABLE	DESCRIPTION
\DISCOUNT1\	Indicates if the discount/markup in the Discount/Markup field is set; used in algorithms (If discount 1 exists = True, if it does not = False)
\DISCOUNT1_NAME\	Discount 1 name
\DISCOUNT1_PERCENTS\	Discount 1 value in percents
\DISCOUNT1_VALUE\	Discount 1 value *in client's currency*

\DISCOUNT1_VALUE_BASE\	Discount 1 value *in base currency*
\DISCOUNT2\	Indicates if the discount/markup in the Discount/Markup field is set; used in algorithms (If discount 2 exists = True, if it does not = False)
\DISCOUNT2_NAME\	Discount 2 name
\DISCOUNT2_PERCENTS\	Discount 2 value in percents
\DISCOUNT2_VALUE\	Discount 2 value *in client's currency*
\DISCOUNT2_VALUE_BASE\	Discount 2 value *in base currency*
\DISCOUNTS\	Indicates if the discounts/markups in the Discount/Markup fields are set; used in algorithms (If any discount is set = True, if there are no = False)
\AFTER_DISCOUNT1\	Total *in client's currency* after Discount 1 applied
\AFTER_DISCOUNT1_BASE\	Total *in base currency* after Discount 1 applied
\NET_JOBS_TOTAL\	Jobs total with discounts *in client's currency*
\NET_JOBS_TOTAL_BASE\	Jobs total with discounts *in base currency*

15.11.5. Payment status variables

VARIABLE	DESCRIPTION
\INVOICE_DUE\	Balance due *in client's currency*
\INVOICE_DUE_BASE\	Balance due *in base currency*
\INVOICE_PAID\	Total payments linked to this invoice *in client's currency*
\INVOICE_PAID_BASE\	Total payments linked to this invoice *in base currency*
\INV_IS_PAID\	Used in algorithms (If the invoice is paid = True, if it's not = False)

\BEFORE_ADJUSTMENTS\	Invoice total *in client's currency*, excluding adjustments
\BEFORE_ADJUSTMENTS_BASE\	Invoice total *in base currency*, excluding adjustments
\ADJUSTMENTS_VALUE\	Value of the adjustments *in client's currency*
\ADJUSTMENTS_VALUE_BASE\	Value of the adjustments *in base currency*
\ADJUSTMENTS_DESCR\	Description of the adjustments
\INVOICE_PAYMETHOD\	Invoice payment method. See Payment Methods topic
\INVOICE_PAYMETHOD_DESCR\	Payment method description. See Payment Methods topic

15.11.6. Credit note status variables

VARIABLE	DESCRIPTION
\CN_TOTAL\	The total of credit notes linked to this invoice, in the clients currency
\CN_TOTAL_BASE\	The total of credit notes linked to this invoice, in the base currency

15.11.7. Jobs variables in invoice

The following variables refer to jobs added to invoice

VARIABLE	DESCRIPTION
\DTLINKJOBS:CJOB_PONUMB\	Client PO of the job
\DTLINKJOBS:CJOB_NAME\	Client job name
\DTLINKJOBS:CJOB_SERV_NAME\	*Service* name.
\DTLINKJOBS:CJOB_GROUP_NAME\	*Group of Services* name.
\DTLINKJOBS:CJOB_ASSIGNED\	Date the client job was assigned
\DTLINKJOBS:CJOB_DEADLINE\	Deadline of client job

\DTLINKJOBS:CJOB_ISCOMPLETED\	Completed (Boolean: True/False)
\DTLINKJOBS:CJOB_COMPLETED\	Date the client job was completed
\DTLINKJOBS:CJOB_PRICE\	Price of client job
\DTLINKJOBS:CJOB_VOLUME\	Client job volume
\DTLINKJOBS:CJOB_FEE_KIND\	Pricing (per unit, flat fee)
\DTLINKJOBS:CJOB_RATE\	Exchange rate
\DTLINKJOBS:CJOB_TOTAL\	Job total *in client's currency*
\DTLINKJOBS:CJOB_TOTAL_BASE\	Job total *in base currency*
\DTLINKJOBS:CJOB_INSTRUCTION\	Instructions of client job
\DTLINKJOBS:CJOB_WORKNOTES\	Work notes of client job
\DTLINKJOBS:CJOB_COUNTNOTES\	CATCount notes of client job
\DTLINKJOBS:SERV_NAME\	Service name of client job
\DTLINKJOBS:UNIT_NAME\	Volume units of client job
\DTLINKJOBS:PROJ_CODE\	Project code of client job
\DTLINKJOBS:CJOB_CODE\	Client job code
\DTLINKJOBS:CJOB_CLCODE\	Client Ref. of the job
\DTLINKJOBS:CCON_NAME\	Client PM of the client job

15.11.8. Linked payment variables

VARIABLE	DESCRIPTION
\DTLINKPAYMENTS:CPAYM_CODE\	Linked payment's code
\DTLINKPAYMENTS:CPAYM_DATE\	Linked payment's creation date
\DTLINKPAYMENTS:CPAYM_TOTOAL\	Linked payment's total value
\DTLINKPAYMENTS:LINK_SUM\	Part of the payment's value linked to this invoice

15.11.9. Linked credit note variables

VARIABLE	DESCRIPTION
\DTLINKCREDITNOTES:CN_CODE\	Credit Note's code
\DTLINKCREDITNOTES:CN_DATE\	Credit Note's creation date
\DTLINKCREDITNOTES:CN_TOTAL\	Credit Note's total value
\DTLINKCREDITNOTES:CN_ASSIGN_TOTAL\	Credit note's value covered by refunds
\DTLINKCREDITNOTES:BALANCE\	Credit note's value not covered by refunds
\DTLINKCREDITNOTES:CN_STATUS\	Credit Note's status. Has the following values: 0 - "Closed": the CN's total is subtracted from the invoice's balance. 1 - "Awaiting payment": the Invoice is paid and the CN requires a refund. 2 - "Partially paid": the CN is partially covered by a refund. 3 - "Fully paid": the CN is fully covered by a refund.

15.12. Credit note template variables

15.12.1. Date and Code

VARIABLE	DESCRIPTION
\CN_STATUS\	Credit note status **Example**: Awaiting payment, Fully paid
\CN_DATE\	Date credit note was sent, in the following format: 10/4/2006
\CN_DATE_LONG\	Date credit note was sent, in the following format: Monday, October 04, 2006
\CN_CODE\	Credit note code

15.12.2. Linked invoice variables

VARIABLE	DESCRIPTION
\INV_DATE\	Date linked invoice was sent, in the following format: 10/4/2006
\INV_CODE\	Linked invoice code
\INV_TOTAL\	Linked invoice total in client's currency

15.12.3. Credit note totals

VARIABLE	DESCRIPTION
\CN_TOTAL\	Credit note total in client's currency
\CN_SUB_TOTAL\	Credit note total with taxes
\CN_RATE\	Exchange rate into base currency
\CN_TOTAL_BASE\	Credit note total in base currency

15.12.4. Taxes

VARIABLE	DESCRIPTION
\TAX1\	Indicates if the tax 1 has been added; used in algorithms (If tax 1 exists = True, if it doesn't = False)
\TAX1_NAME\	Tax 1 name
\TAX1_PERCENTS\	Tax 1 value in percents
\TAX1_VALUE\	Tax 1 value in client's currency
\TAX1_VALUE_BASE\	Tax 1 value in base currency
\TAX2\	Used in algorithms (If tax 2 exists = True, if it doesn't = False)
\TAX2_NAME\	Tax 2 name
\TAX2_PERCENTS\	Tax 2 value in percents
\TAX2_VALUE\	Tax 2 value in client's currency
\TAX2_VALUE_BASE\	Tax 2 value in base currency
\TAXES\	Indicates whether the taxes in Tax fields are set; used in algorithms (If any tax is set = True, if it they are not = False)

15.12.5. Refund status variables

VARIABLE	DESCRIPTION
\CN_DUE\	Balance due in client's currency
\CN_DUE_BASE\	Balance due in base currency
\CN_PAID\	Total refunds linked to this credit note in client's currency
\CN_PAID_BASE\	Total refunds linked to this credit note in base currency
\CN_IS_PAID\	Used in algorithms (If the credit note is paid = True, if it's not = False)

15.12.6. Linked refund variables

VARIABLE	DESCRIPTION
\DTLINKREFUNDS:CREF_CODE\	Linked refund's Code
\DTLINKREFUNDS:CREF_DATE\	Linked refund's creation date
\DTLINKREFUNDS:CREF_TOTAL\	Linked refund's total value
\DTLINKREFUNDS:LINK_SUM\	The linked refund's value linked to this credit note

15.13. Payments template variables

15.13.1. Basic payments template variables

VARIABLE	DESCRIPTION
\PAYMENT_CODE\ \CODE\	*Payment* code.
\PAYMENT_DATE\ \PDATE\	Date *payment* received in following format: 10/4/2006.
\PAYMENT_DATE_LONG\ \PLONGDATE\	Date *payment* received in following format: Monday, October 04, 2006.
\PAYMENT_NOTES\	Notes about *payment*.
\TOTAL_PAID\ \TOTAL\	Total paid.
\NOT_LINKED\	Amount not linked with *invoices*.
\LINKED\	Amount linked with *invoices*.
\IS_LINKED\	Used in algorithms (If *payment* is linked with *invoice* = True, if it's not = False)
\PAYMENT_NOTES\ \NOTES\	*Payment notes*

15.13.2. Linked invoice variables

These variables can add information from linked invoices to payment template

VARIABLE	DESCRIPTION
\DTLINKINVOICES:IDATE\	Linked *invoice* date.
\DTLINKINVOICES:ICODE\	Linked *invoice code*.
\DTLINKINVOICES:GNUMB\	Linked *invoice global code*.
\DTLINKINVOICES:TOTAL\	Linked *invoice* total.
\DTLINKINVOICES:OTHER\	The part of the linked *invoice* total covered by other *payments*.
\DTLINKINVOICES:ADJUST\	The sum of the *phantom payment* of the linked *invoice*.
\DTLINKINVOICES:BALANCE\	Balance Due of the linked *invoice*.
\DTLINKINVOICES:DATEDUE\	Linked *invoice* due date.

15.14. Refund Template Variables

VARIABLE	DESCRIPTION
\REF_CODE\	Refund code
\REF_DATE\	Date refund was received, in the following format: 10/4/2006
\REF_DATE_LONG\	Date refund was received, in the following format: Monday, October 04, 2006
\REF_NOTES\	Notes about refund.
\TOTAL_PAID\	Total paid (in client's currency).
\TOTAL_PAID_BASE\	Total paid (in base currency).
\REF_RATE\	Exchange rate.

\NOT_LINKED\	Amount not linked with credit notes.
\LINKED\	Amount linked with credit notes.
\IS_LINKED\	Used in algorithms (If refund is linked with credit note = True, if it's not = False).

15.14.1. Linked credit note cariables

VARIABLE	DESCRIPTION
\dtLinkCNs:ICODE\	The credit note's code
\dtLinkCNs:IDATE\	The credit note's creation date
\dtLinkCNs:TOTAL\	The credit note's total value
\dtLinkCNs:LINKED\	The part of the credit note's total that is linked to this refund
\dtLinkCNs:OTHER\	The part of the credit note's total that is linked to other refunds
\dtLinkCNs:BALANCE\	The part of the credit note's total that is not linked to any refund

16. Data Import Utility

The TO3000 3D+ Data import Utility is used to import information about Clients from outside sources without the need to manually enter it.

The utility can import data from the following file types: XLS and XLSX (Microsoft Excel), TXT, CSV, DBF (dBase 3, 4 and 5), XML (Data Packet 2.0)

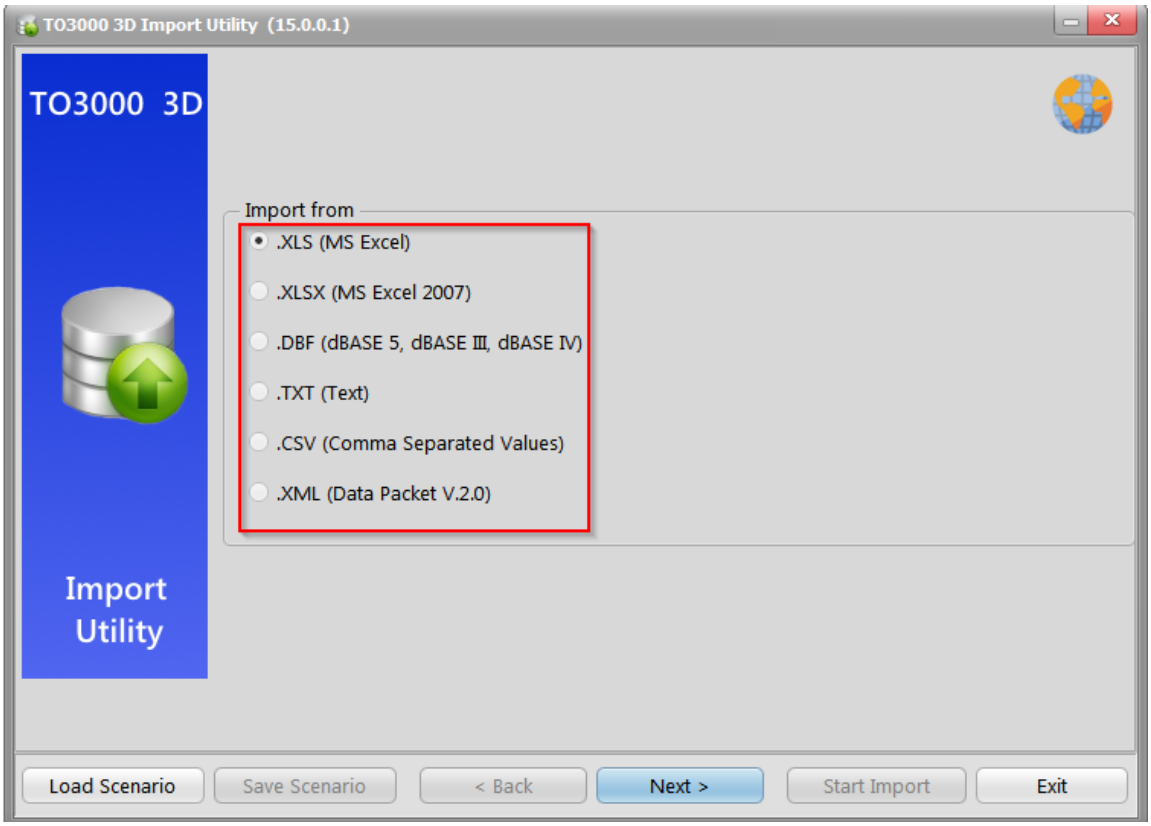
Import settings can also be saved in special scenario files, allowing you to import data from the same source regularly, without having to fiddle with the settings every time.

NOTE: It is highly recommended to backup your database before using the Data Import utility. This will allow you to quickly roll back unintended or undesired changes.

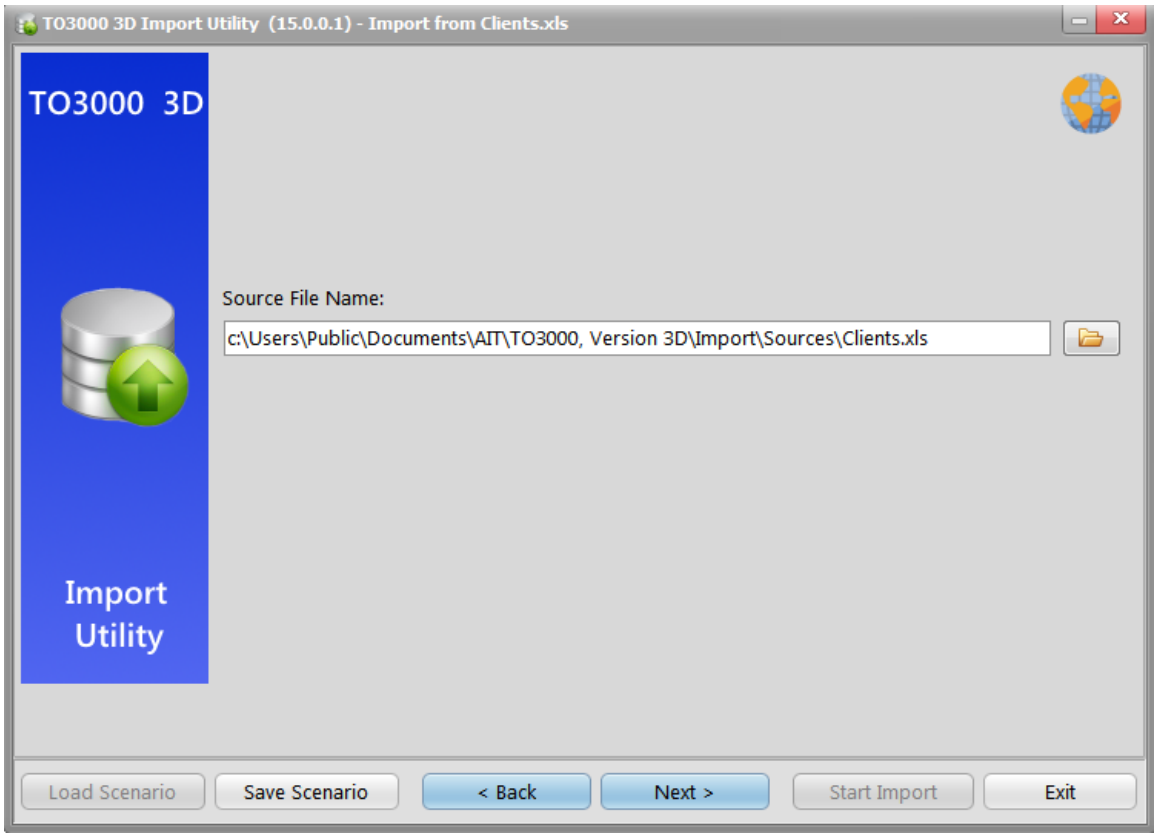
The next topics will cover the process of importing data from the different file formats

16.1. Selecting the mode and file

The first step when using the Data import utility is to choose the format of the source file. This is the step at which you can load a scenario file.



Finally, you select the actual source file. If you loaded a scenario beforehand, the file path to the source file will likely be pre-entered.



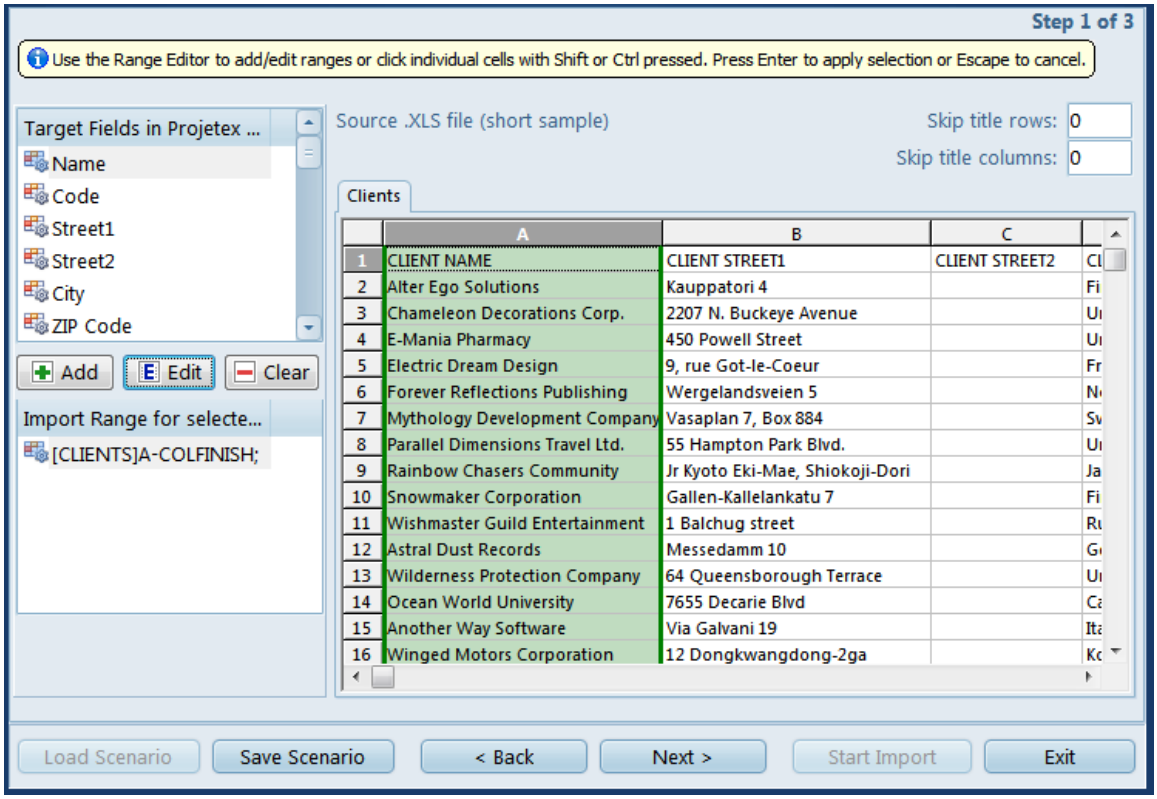
The next screen is the Range Editor. Its appearance will vary depending on the chosen format.

See the topics for each format for more details: XLS, XLSX, DBF, TXT, CSV, XML.

16.2. Range Editor

16.2.1. XLS Range Editor

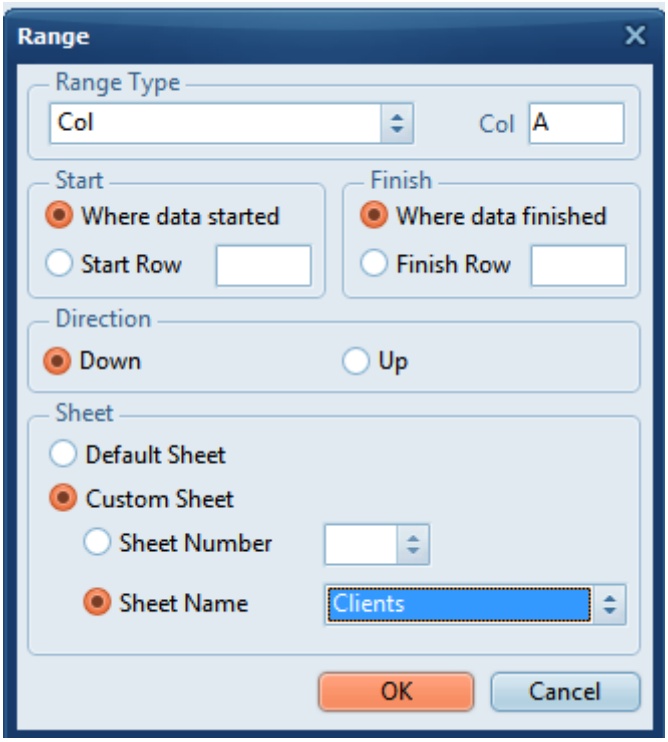
Used for pre-2007 Microsoft Excel files.



The two main elements are the **Target Field List** in the upper-left, and the file contents on the right side of the screen.

To designate a range of cells to be imported into a field of the Client table in TO3000, select the target field and click **Add.**

This will bring up the New/Edit Range dialog:



Here you can determine the range's type (row or column or single cell), it's location and boundaries, as well as the direction in which the data in it should read.

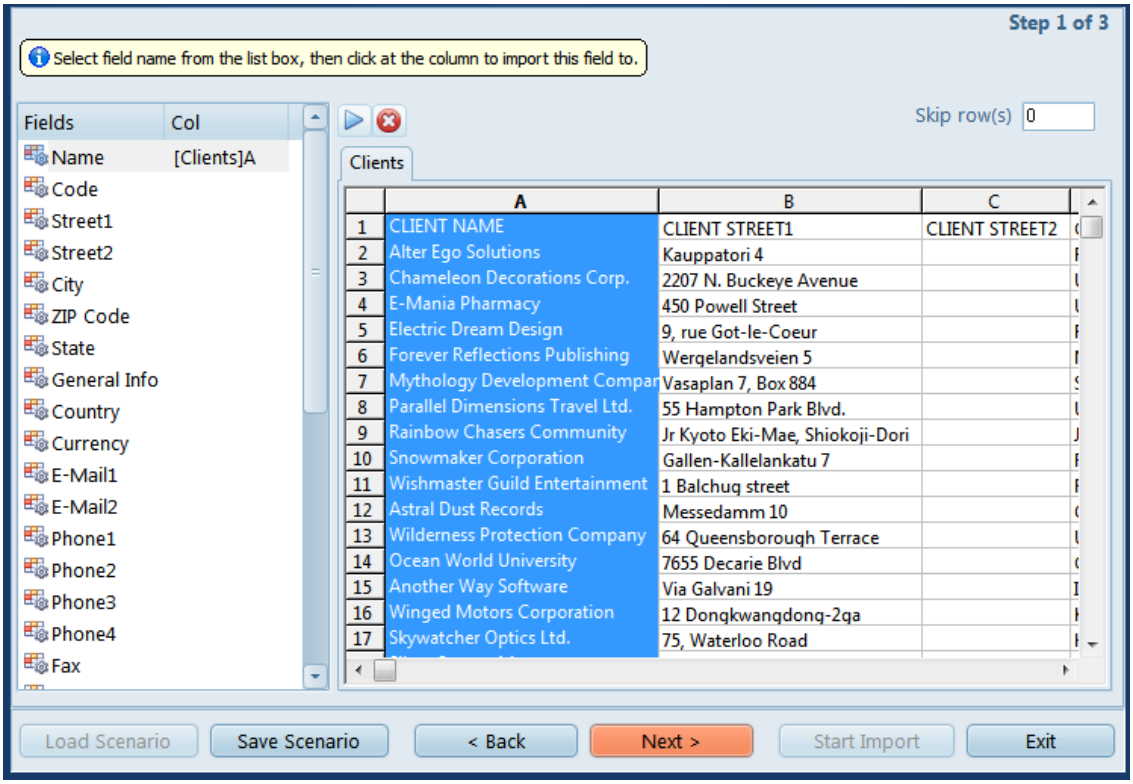
A single target field can have multiple ranges. An existing range can be edited or removed.

Alternatively, you can hold **Ctrl** or **Shift** and click the rows/columns/cells you want to add to a particular range. Press **Enter** to confirm your selection or **Escape** to cancel it.

If the table has a number of title rows and/or columns, they can be skipped by inputting their number into the **Skip title rows/columns** filed in the upper-right corner of the main editor.

16.2.2. XLSX range Editor

Used for Microsoft Excel 2007 and newer files.



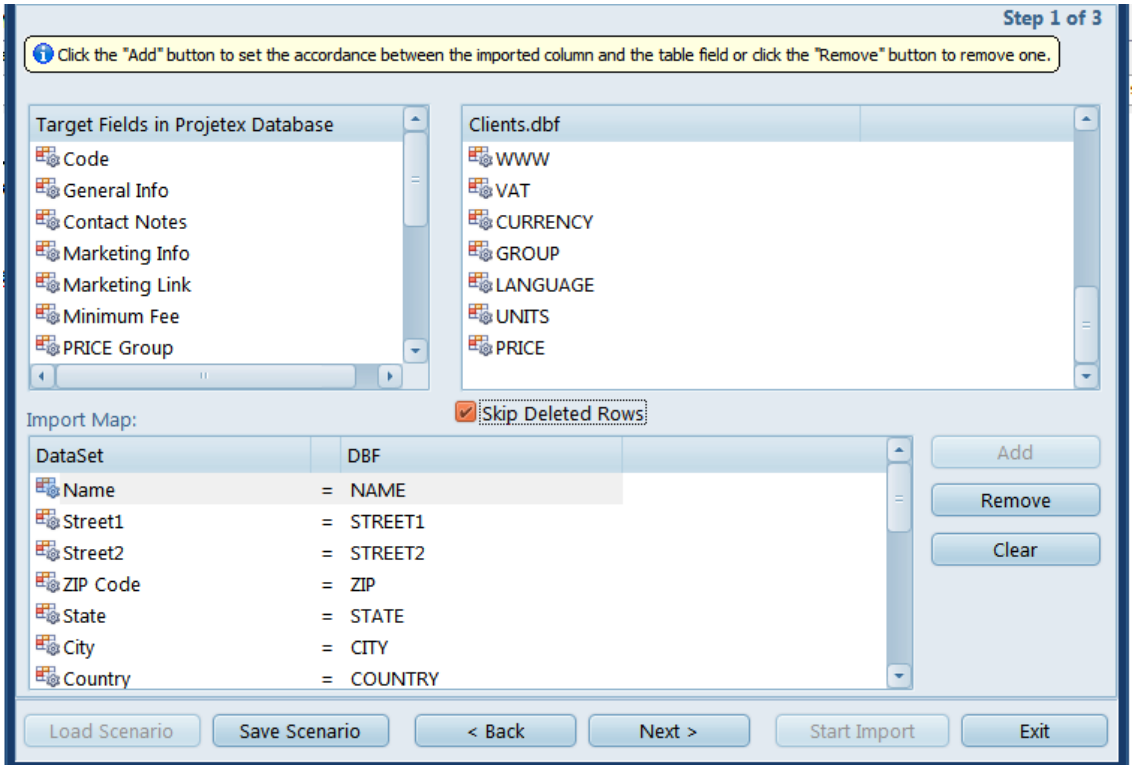
Select a TO3000 database field from the left-hand list and click the corresponding column in the table to the left to assign that column to the field.

The **Auto-assign** button will automatically assign columns to fields based on their order and **Cancel** will clear all selections.

Use the **Skip Row(s)** field to exclude title rows from the import.

16.2.3. DBF Range Editor

Used for dBase 3, dBase 4 and dBase 5 files.



Select the target and source fields in the top half off the screen and click **Add** to set up a link between them.

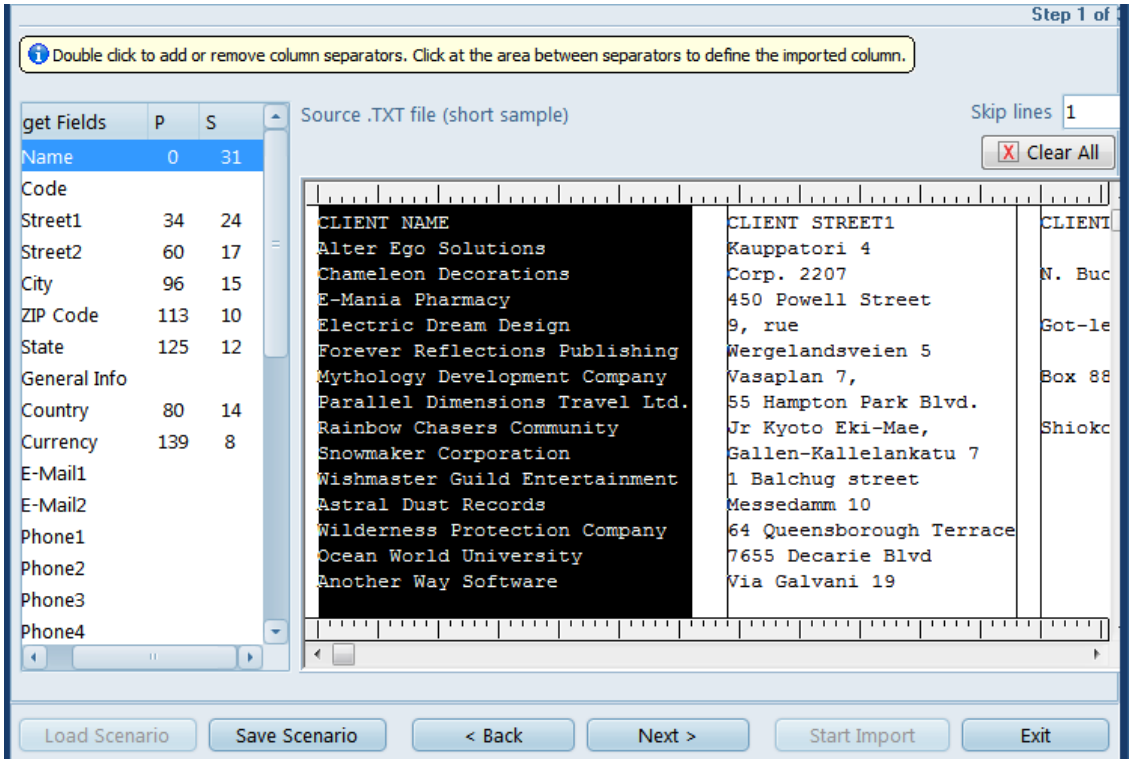
Click **Remove** or **Clear** to cancel a particular link or all links, respectively.

One peculiar feature of dBase is that deleted records are not immediately removed from the database, instead they are just given the "deleted" status, emulating a "recycling bin" kind of functionality.

You can choose to either skip these rows or import them with the **Skip Deleted Rows** checkbox.

16.2.4. TXT range editor

Used for whitespace-separated TXT databases.



Important Note: The spaces between the columns in the file must be filled with **whitespace** characters, not tab characters.

To import data from a TXT file, you must first define the columns by placing separator lines.

Double click to place and remove separators, click and drag to move them. The space between two separators should completely cover the longest entry in that column.

Once all separators are placed, select fields from the list to the right and click the required columns in the table. The import utility will record the starting point and width of the column for each field.

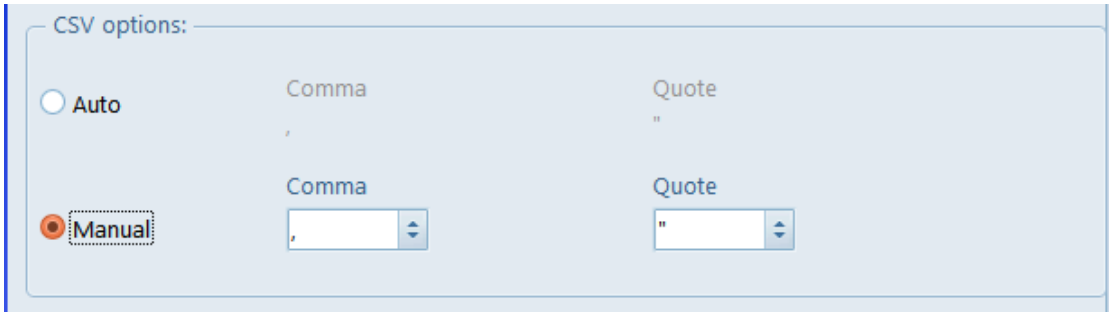
Use the **Skip Lines** field to skip title lines.

Clicking **Clear all** will remove the mapping between the columns and database fields, but not the separators.

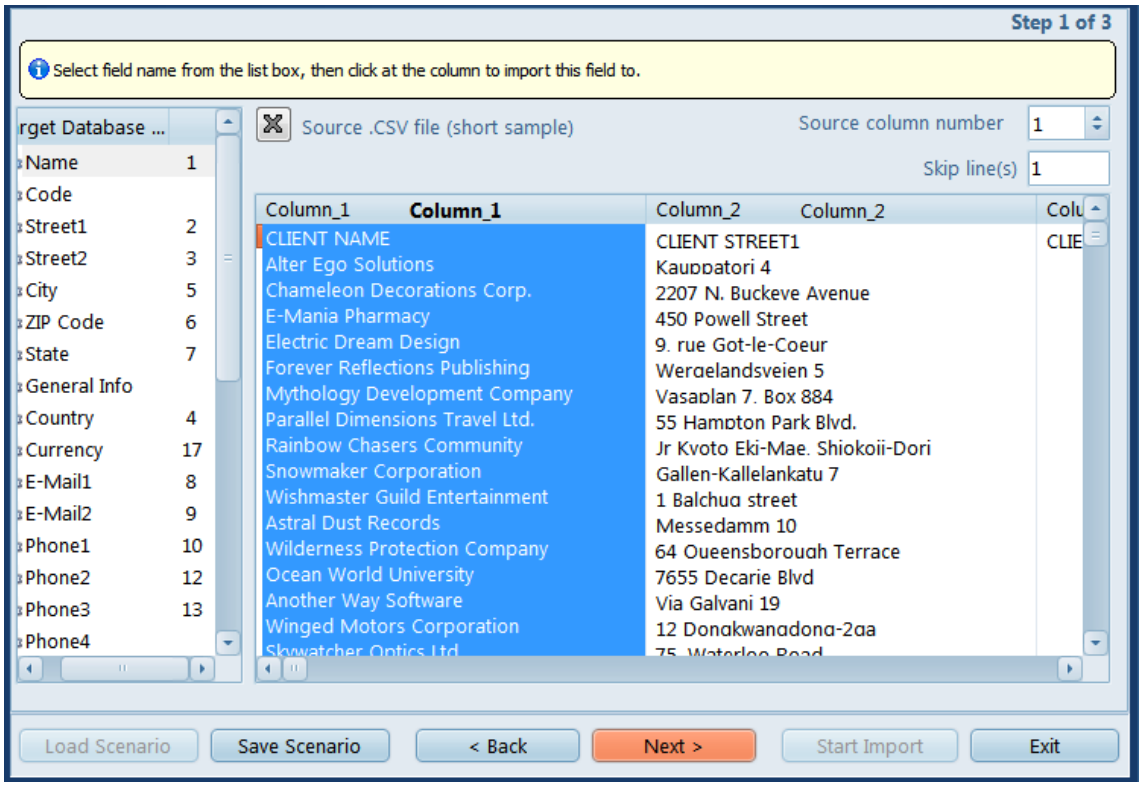
16.2.5. SCV range editor

Used for Comma Separated Values files.

Before going to the range editor itself, you can adjust the "comma" and "quote" symbols that the utility will be looking for while reading the file, since some files can use symbols different from the standard.



The interface of the CSV Range Editor proper is quite similar to that of the XLSX range editor.

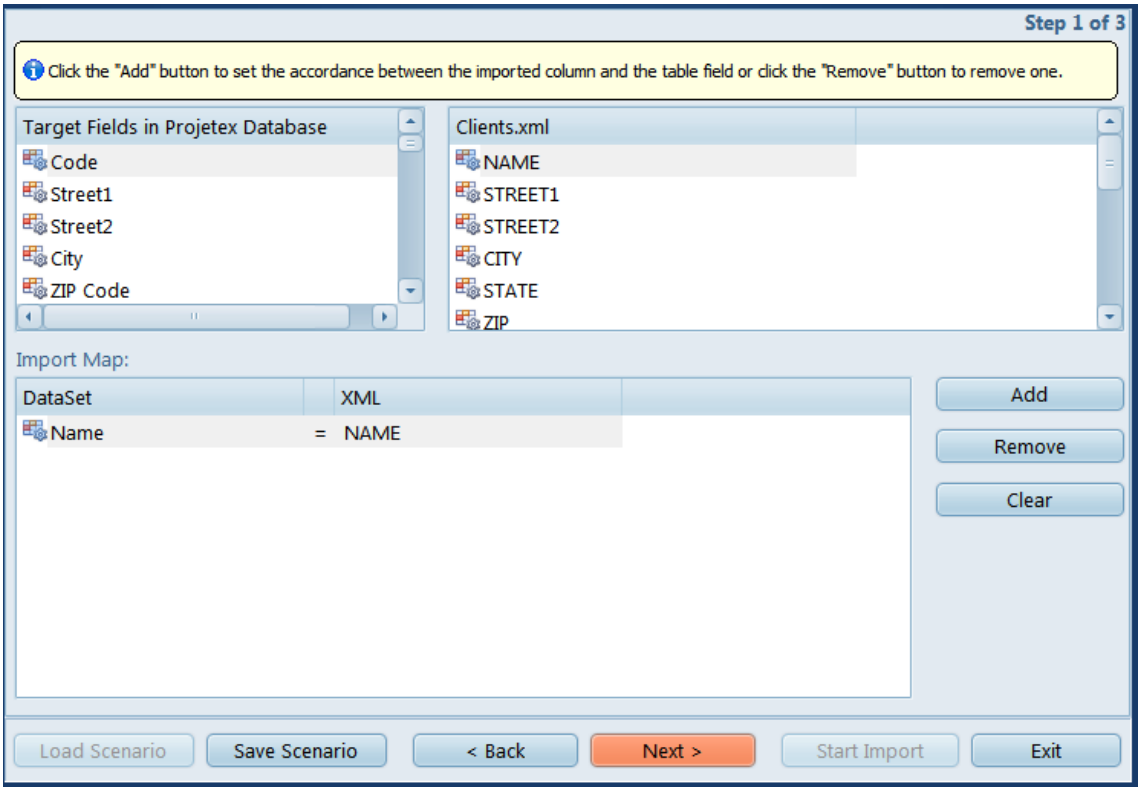


Select a database field and click a Column in the file display to link it to that field. Click the 'X' button to clear all links.

Use the **Skip lines** field to exclude title lines.

16.2.6. XML Range Editor

Used for Data Packet V 2.0 files.



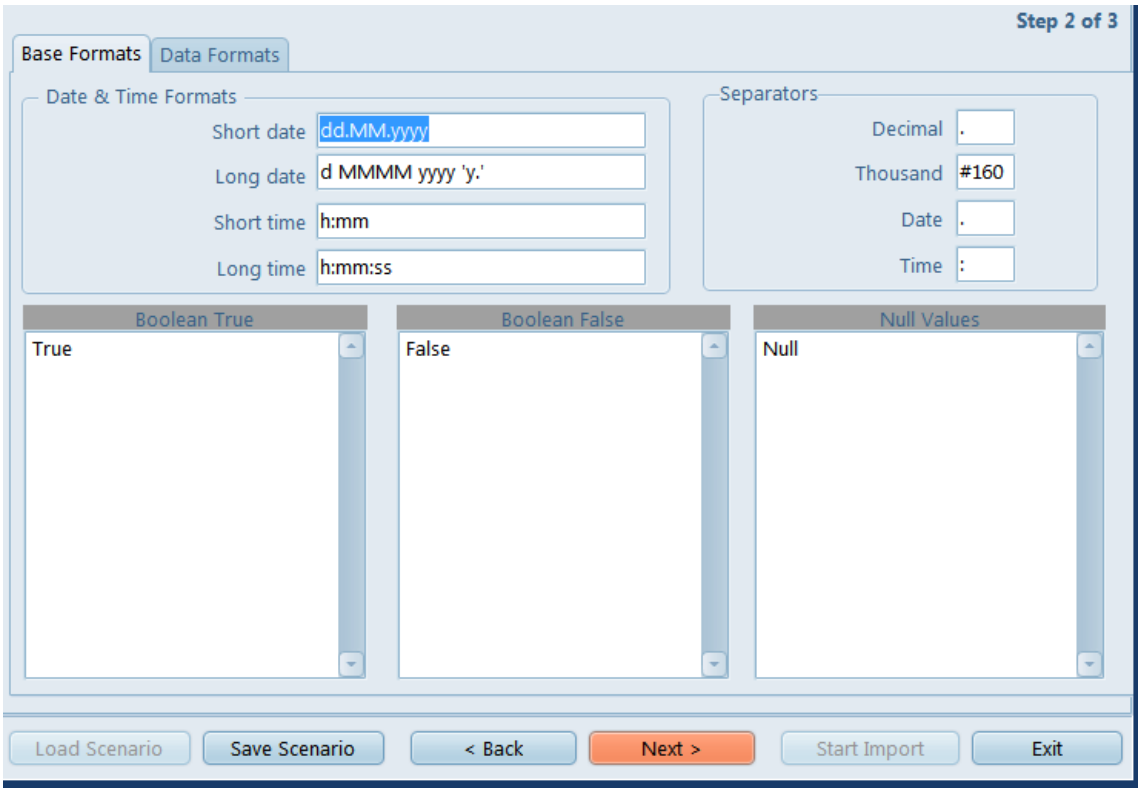
Select the target and source fields in the top half off the screen and click **Add** to set up a link between them.

Click **Remove** or **Clear** to cancel a particular link or all links, respectively.

16.3. Formatting Options

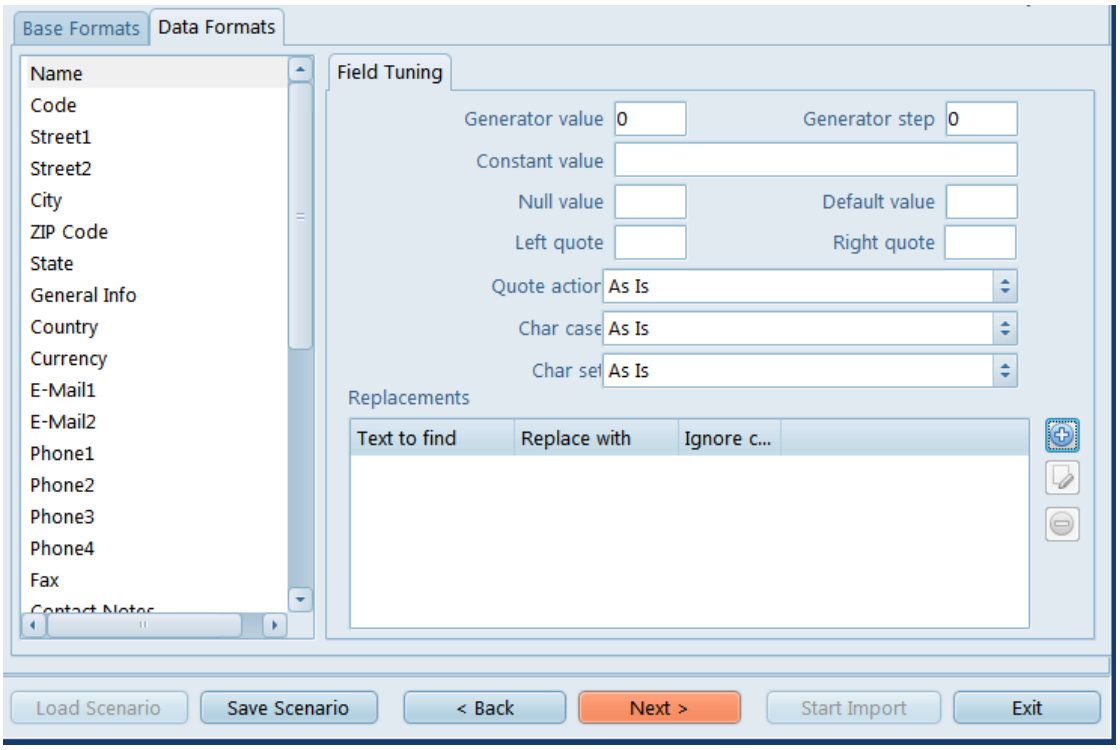
The next step after the Range editor involves setting the options for parsing some of the formatting in the source file. These options are separated between two tabs.

16.3.1. Base Formats



Here you can tell the utility how the source file records dates and time, what separators are used for decimals, thousands (by default set to #160: non-breaking space), date and time, as well as enumerate the values used to represent the boolean states and the null state.

16.3.2. Data Formats



On this tab you can customize the format of each imported field in case when additional formatting is required. Select the field in the 'Field Name' list and set its format in the proper edit fields. The available options are as follows:

Generator Value - use this edit field to set the initial value of the autoincrement field.

Generator Step - set the step of the autoincrement field. If it is 0 then the value of the generator will be ignored.

Constant Value - use this edit field to set the constant value of the field.

Null Value - set the value, which will be understood as NULL to set the default value.

Default Value - set the default value of the NULL field.

Left quotation - set a character or a number of characters, which denote quoting in the imported string.

Right quotation - set a character or a number of characters, which denote unquoting in the imported string.

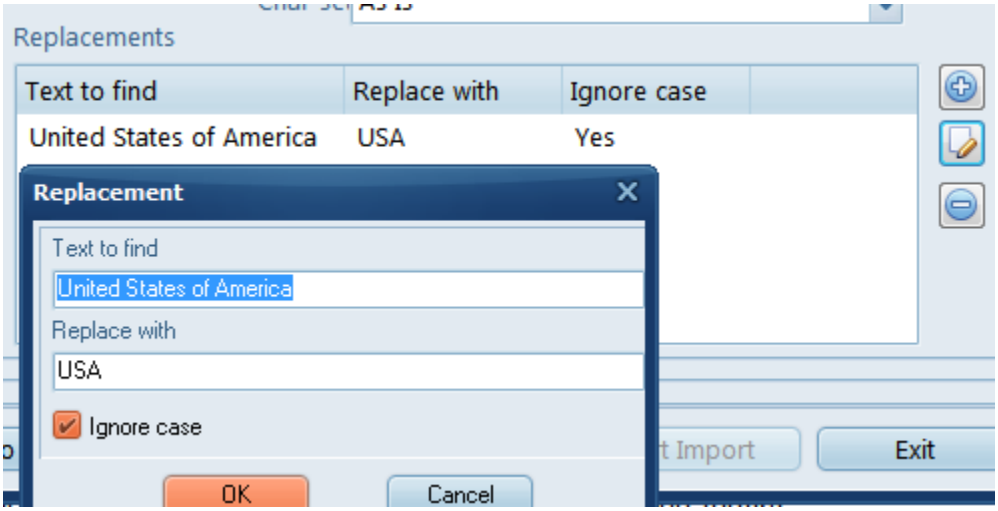
Quotation action - you can select 'Add' to add quotation marks to the imported string, 'Remove' to remove all the quotation marks from the imported string or 'As is' to save the original quotation marks.

Char case - set the case of the imported string. 'As is' saves the original string, 'Upper' sets the whole string to upper case, 'Lower' sets the whole string to lower case, 'UpperFirst' sets the first letter of the string to upper case, 'UpperFirstWord' sets the first letter of each word to upper case.

Char set - set the char set of the imported string to ANSI or OEM. 'As is' saves the original string char set.

Replacements

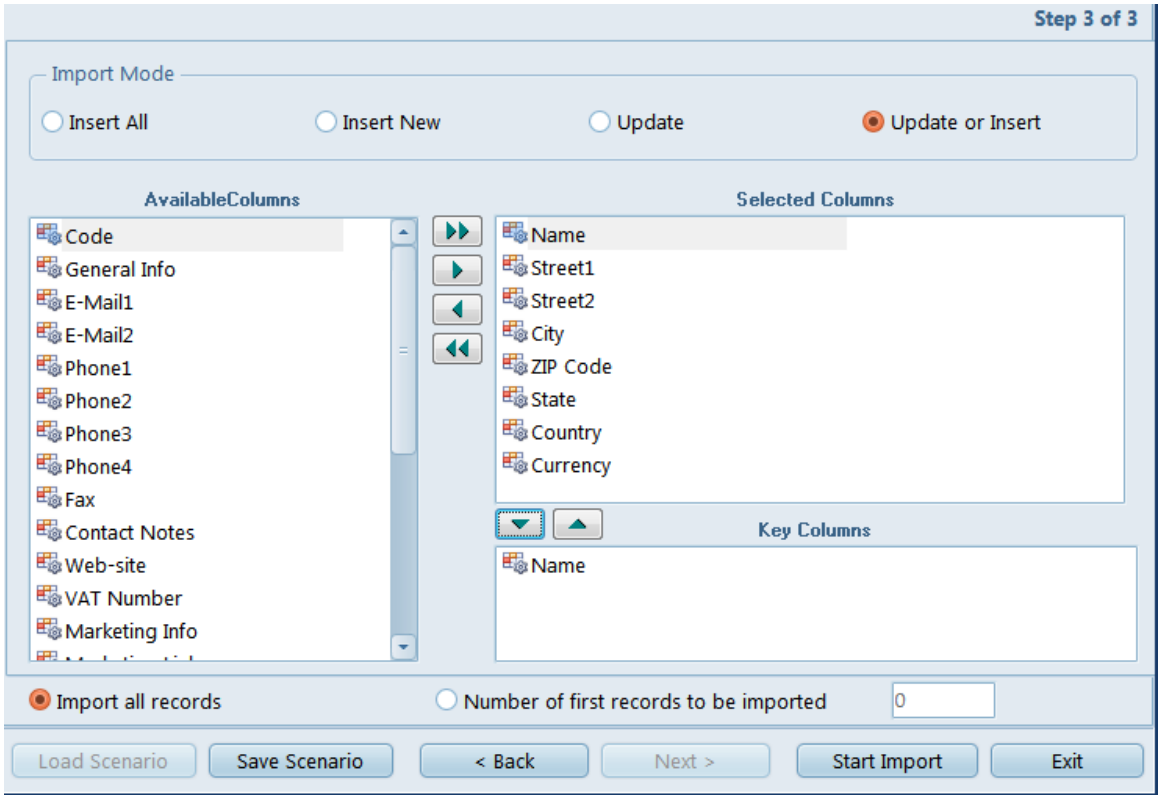
Here you can set the replacement list for the selected field.



Every time the utility finds cell in that field, with a value matching one in the list, it will be automatically replaced. The **Ignore Case** option allows you to treat strings with different capitalizations as the same string and replace them all with a single alterative string.

16.4. Import Options

Here you can select the import mode and set the extent of the import.



Four Import modes are available:

Insert All - Inserts all the records from the source file to the target object

Insert New - Inserts records which are not in the target object yet, others are skipped

Update - Updates those records which already exist in the target object, others are skipped

Update or Insert - Updates existing records and inserts new records

To choose which columns to import data into, select them in the "Available/Selected Columns" lists and use the four buttons between the lists to move the columns back and forth.

When using any Import mode other than **Insert All**, you will be required to designate one or more Key Columns. If a particular record's Key Column values match those of a record already in the database, the matching record will be updated. Otherwise, the data will be placed into a new record. Choose Key columns by using the "up/down" buttons next to the "Selected Columns" list.

At the bottom of the window you can choose whether you want to import all the records in the file or only a certain number (starting from the top).

Once you are satisfied with the settings, click **Start Import**.

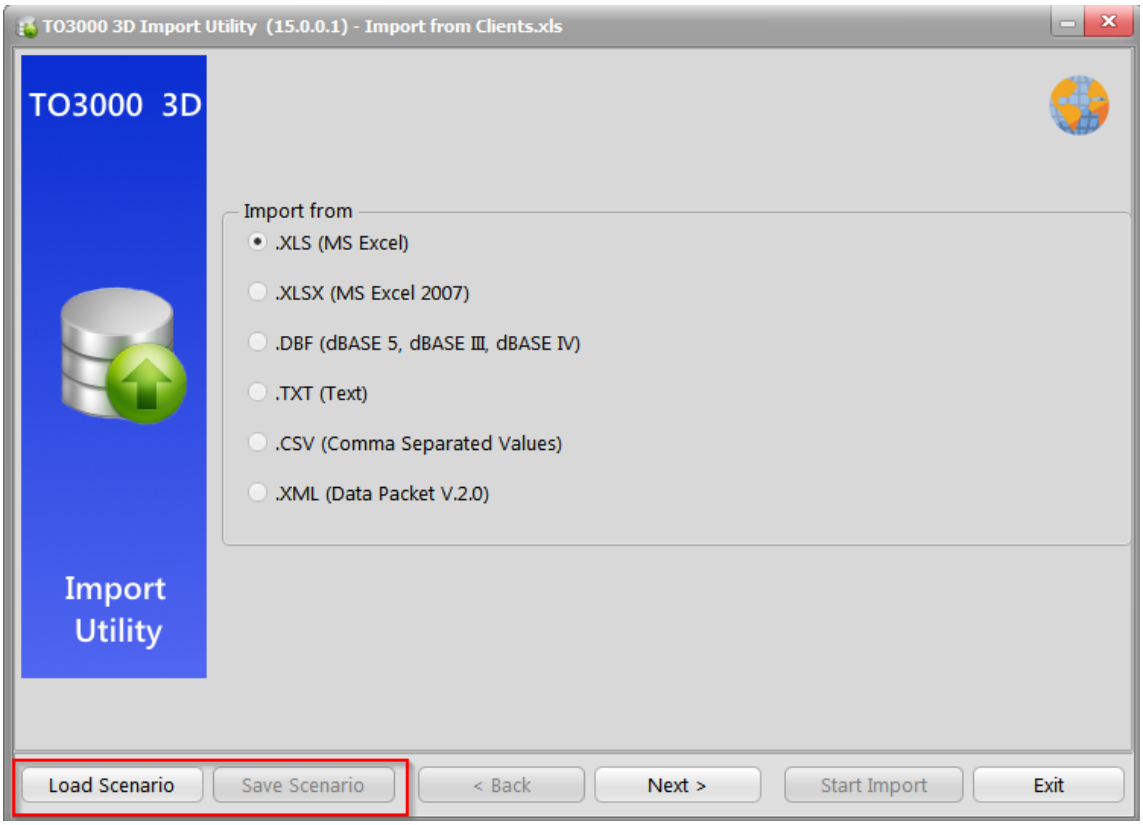
NOTE: If you want to save an import scenario for later use, it is recommended to do so at this step, immediately before or immediately after performing the actual import.

16.4.1. Import scenarios

Import scenarios are special files that store the configuration of import sessions.

They are very useful for those who regularly import files from the same source, as using them allow to avoid having the configure the import session by hand.

To manage import scenarios, use the **Save Scenario** and **Load Scenario** buttons in the bottom-left corner of the window.



A scenario can be saved at any point during the configuration process, but it is recommended to save scenarios immediately before or immediately after performing the actual import.

A scenario can be loaded only during the "select format" step.

17. AnyCount in TO3000 3D+

17.1. Introduction

AnyCount is a text count engine, which automatically calculates text volumes contained in a file (or a number of files). Counts can be produced in different volume units (words, characters with spaces, characters without spaces, lines, pages, custom units). AnyCount works with all most common file formats.

TO3000 3D+ has a built-in AnyCount to aid and simplify job creation and expenses calculation for each job.

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

In TO3000 3D+, AnyCount is used to quickly calculate volumes of new jobs and quotes. AnyCount options can be found in the **New/Edit Draft Client/Prospect Job**, and **New/Edit Client/Prospect Job windows.**

17.2. Counting files

In TO3000 3D+, AnyCount is used in the following way:

When creating a job, click the **<=AnyCount** button to run AnyCount. It will automatically count the required units in target files and enter the resulting number into the **Volume** field.

1. Select the volume units from the corresponding drop-down list.

NOTE: If the units selected where not specified as "Used by AnyCount" you will not be able to perform the count. This option is available on the AnyCount tab of the User Settings. It was implemented to distinguish volume units, that cannot be used as text volume units (e.g. "hours").

2. Click the **<=AnyCount** button.

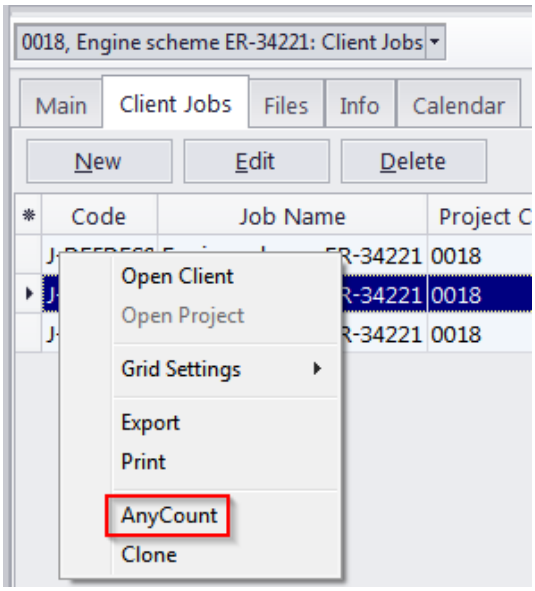
3. Select the file(s) to be counted in the **Open** window and either double click it or click the **Open** button:

4. The AnyCount Engine will count the text in the selected file(s) and enter the count results into the **Volume** field of the **New/Edit Job** window.

5. An expanded count report is added on the **Notes** tab which appears after AnyCount is used:

17.3. Creating client jobs based on counted file(s)

Right-click in the **Client Jobs** tab of the **Project** or **Client** window 9 depending on current workflow mode and select **AnyCount**. Select the volume unit to count in and click the **OK** button. Select the file(s) to count. Once the count process is completed, TO3000 will open the "new client job" window with the name of the counted file, and the appropriate volume and volume units. If you chose to count multiple files, the program will ask you if you want to create a single job for all selected files or a separate job for each file.



18. CATCount in TO3000 3D+

18.1. Introduction

CATCount is a tool for calculating Computer Assisted Translation (CAT) cost. In TO3000 3D+, CATCount is used for accounting of computer assisted translation jobs. It's primary functions are:

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

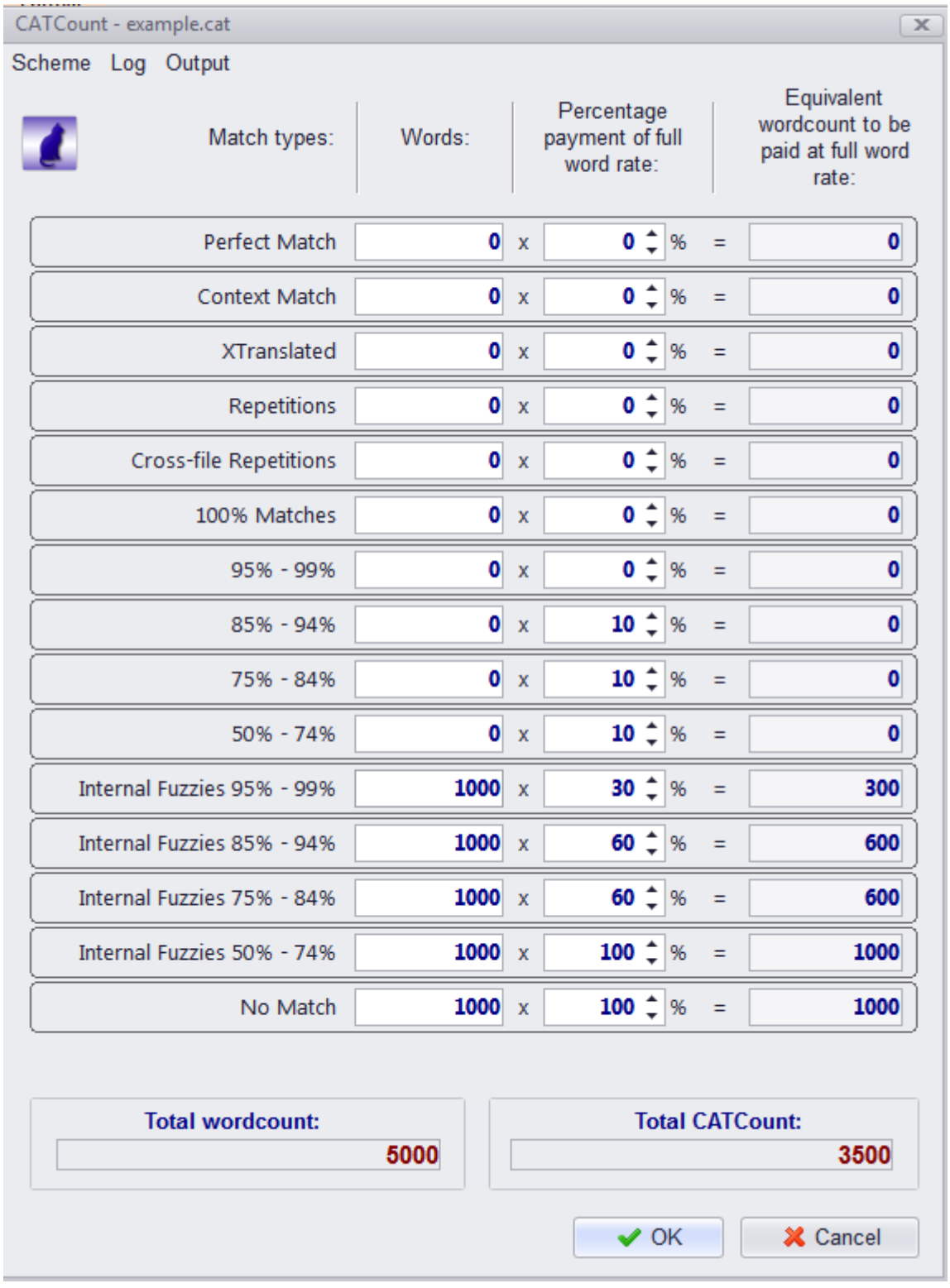
CATCount options can be found in the following TO3000 3D+ windows: **New/Edit Draft Client Job**, **New Client Job (Edit Client Job)** and **New Quote (Edit Quote)**.

18.2. Interface

In TO3000 3D+, CATCount is used in the following way.

When you open a **New Job** window you specify the job name, group and service at first. CATCount comes in handy when you want to specify the volume of the job and calculate its cost using the CAT Scheme. The result will be automatically entered into the **Volume** field.

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


CATCount - example.cat
Scheme Log Output
Match types:
Words:
Percentage payment of full word rate:
Equivalent wordcount to be paid at full word rate:
Perfect Match 0 x 0 % = 0
Context Match 0 x 0 % = 0
XTranslated 0 x 0 % = 0
Repetitions 0 x 0 % = 0
Cross-file Repetitions 0 x 0 % = 0
100% Matches 0 x 0 % = 0
95% - 99% 0 x 0 % = 0
85% - 94% 0 x 10 % = 0
75% - 84% 0 x 10 % = 0
50% - 74% 0 x 10 % = 0
Internal Fuzzies 95% - 99% 1000 x 30 % = 300
Internal Fuzzies 85% - 94% 1000 x 60 % = 600
Internal Fuzzies 75% - 84% 1000 x 60 % = 600
Internal Fuzzies 50% - 74% 1000 x 100 % = 1000
No Match 1000 x 100 % = 1000
Total wordcount:
5000
Total CATCount:
3500
OK
Cancel

18.3. Creating CAT counts

1. Click the **<=CATCount** button in the **New/Edit Draft Client Job** , **New Client Job (Edit Client Job)** or **New Quote (Edit Quote)** window to open the **CATCount** window.

2. Enter the number of words with different match levels (100% match, "fuzzy" match and so on), and the percentages of full rate payment, i.e. the CAT Scheme. Once you have entered the values you can save the scheme by clicking **Scheme** > **Save**. You can load it next time by clicking **Scheme** > **Load**.

NOTE: You can load word count analysis logs from Trados Translator's Workbench or Logoport using the menu **Log** > **Load**.

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

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

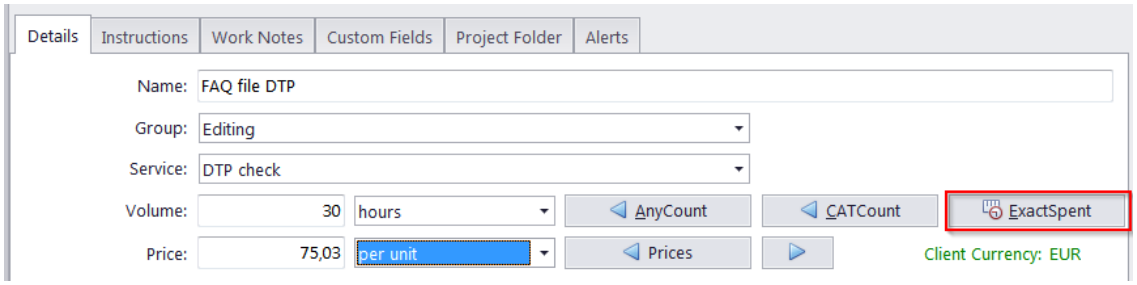
19. Integration with ExactSpent

ExactSpent is a Time tracking software, designed to help users manage and optimize their work time.

The current version of ExactSpent features integration with TO3000, allowing the two programs to work in tandem.

19.1. Automatic Job Submission

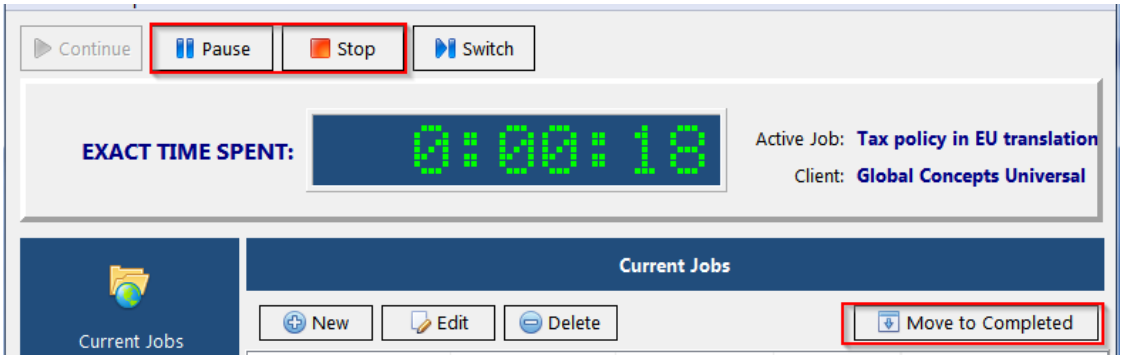
The **New/Edit Client Job** Window in TO3000 features an **ExactSpent** button.



Pressing it checks if ExactSpent is installed, if the volume unit, pricing method, and special status are correct, and if all is in order, opens/launches ExactSpent, opens the Start Job dialog and focuses it on the Job in question. If that job and/or it's client don't exist in ExactSpent yet, they are created.

19.2. Job Duration Transfer

Once you pause or stop a job sent to ExactSpent from TO3000, it's current duration is sent back and entered into the Volume field. When you click the Move to Completed button in ExactSpent, the corresponding Job in TO3000 will receive the "Completed" status.

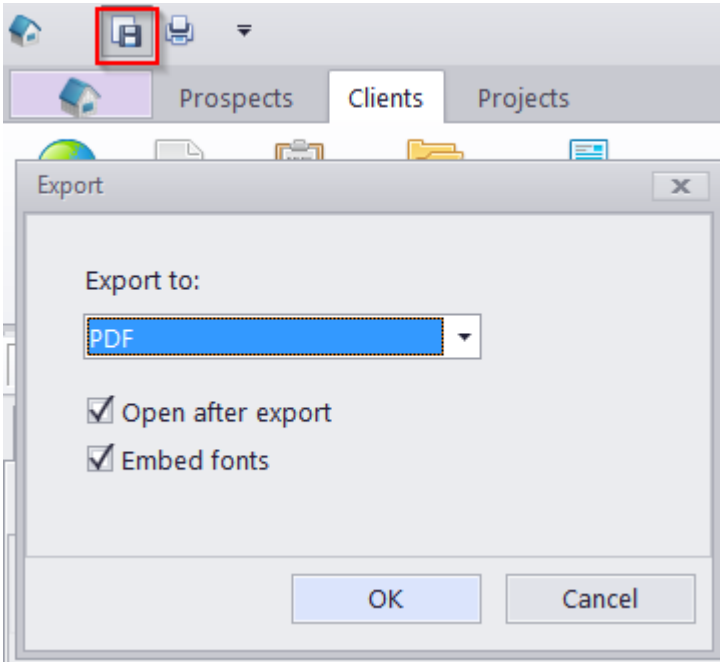


If TO3000 is not running when you pause/stop/complete such jobs, the data will be recorded in a small file and transferred into TO3000 at next launch.

NOTE: information will be sent back to TO3000 ONLY if the option "Enable ExactSpent feedback" is enabled.

20. Exporting

Any table in TO 3000 can be exported to a number of formats (CSV, TXT, HTML, XLS, XLSX, XML, PDF), by clicking the **Export** button in the top-left corner of the program window.



This will open the Export dialog box with several options.

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

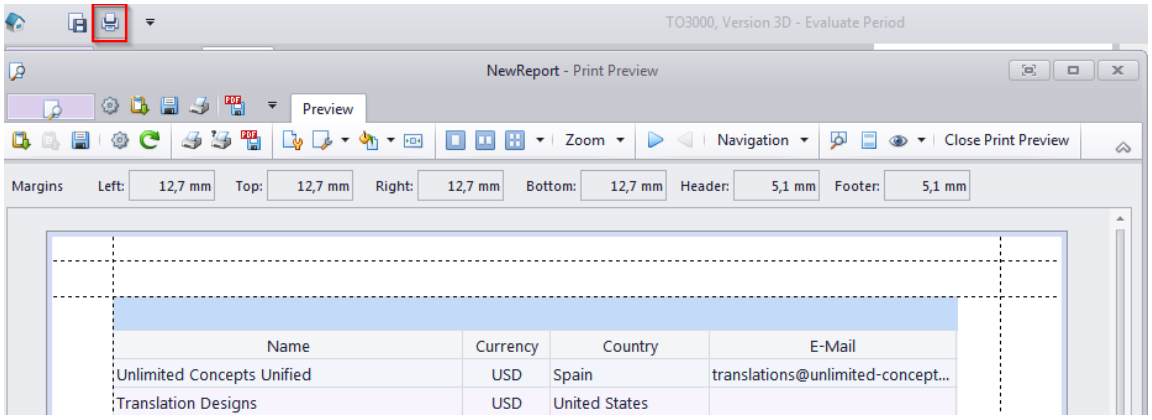
The **Open after export** check-box automatically opens exported file.

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

20.1. Printing

To print any table, 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.



21. Mass action

Mass action in TO3000 3D+ allows you to quickly *invoice* multiple *projects* and *jobs*. Mass action can also be used to create payments and link them with all unpaid invoices.

The following types of mass action are available:

Mass invoicing

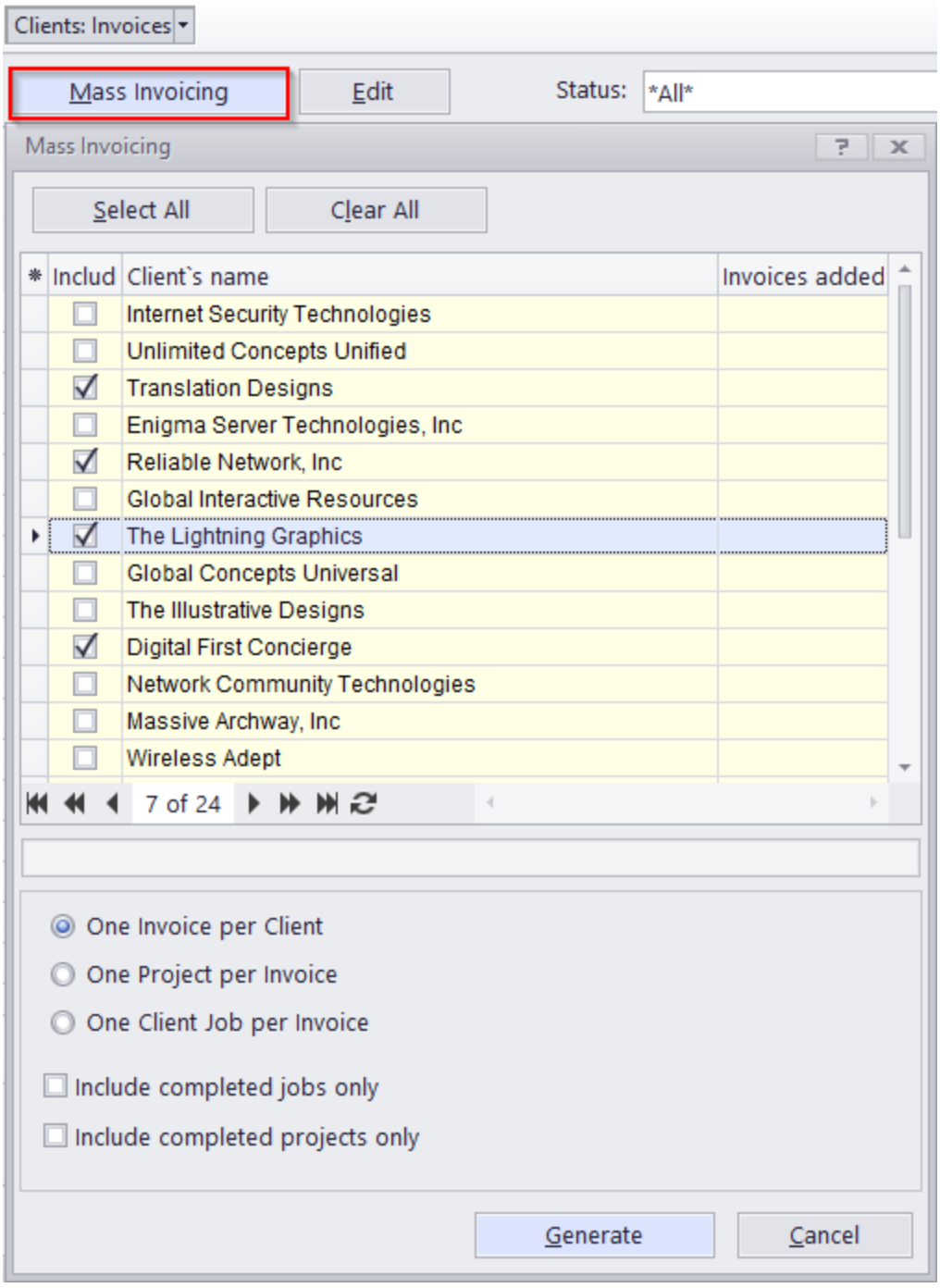
Mass payments from clients

21.1. Mass invoicing

Mass invoicing can be done from the **Invoices to Clients** window. It allows to quickly invoice all or certain jobs stored in the database.

1. To begin the invoicing procedure, open the **Clients: Invoices window** and click the **Mass Invoicing** button (shortcut Alt+M).

2. This will open the **Mass Invoicing window** which should look like this:



•Select the ***clients*** whose ***jobs*** you wish to invoice by double-clicking the check box in front of each client.

•Select one of three Invoicing modes: Generate a single invoice for all jobs of a single client, all jobs in a single project, or create a separate invoice for each job.

•Select **Include completed jobs only** to generate ***invoices*** only for *jobs* that are marked as finished in your database, or **Include completed projects only** to generate ***invoices*** only for *jobs* from *projects* that are marked as finished.

3. After selecting the required clients and setting up the **Mass Invoicing** options, click the **Generate** button. The program will begin creating invoices, which will be indicated by a progress bar.

4. Once all specified invoices have been generated, the **Mass Invoicing** window will display the number of invoices generated against each ***client***.

6. You can now adjust the settings and generate another set of invoices.

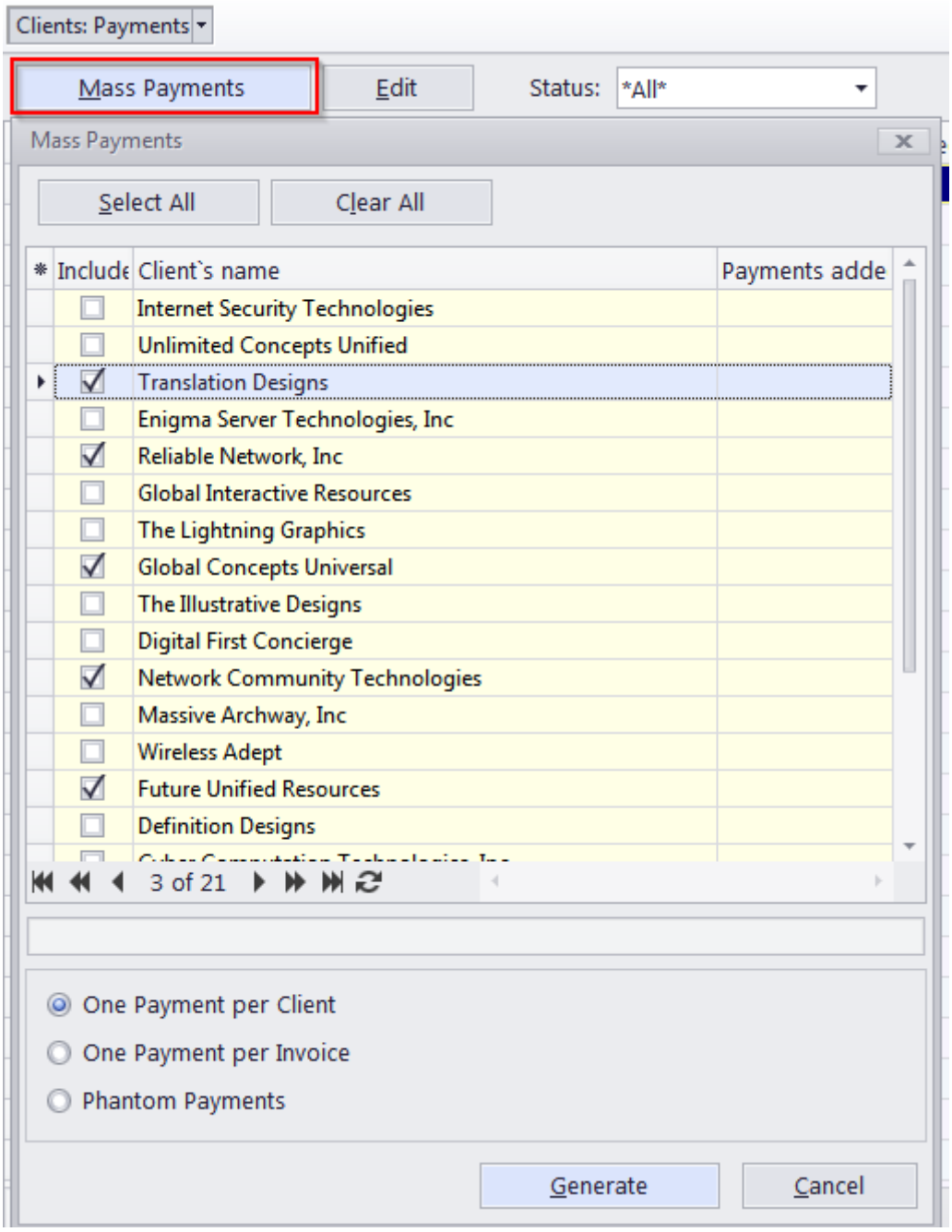
NOTE: Once the ***invoices*** have been generated, they can be opened and edited in the **Invoices to Clients** window or the **Invoices tab** of the **Client** window.

21.2. Mass payments from clients

Multiple ***payments*** **from clients** can be created according to existing ***invoices*** and linked with them.

1. To open the **Mass Payments** window, open the **Clients: Payments** window first, and then click **Mass Payments** button (shortcut Alt+M).

2. This will open **Mass Payments** window:



•Select the **clients**, whose ***invoices*** you wish paid, by double-clicking the check box in front of each client.

•Select one of three payment generation modes: create and link a single payment to all of a client's invoices, create and link a separate payment for each invoice, or cover the invoices with Phantom payments.

3. After selecting the required clients and setting up mass payment options, click the **Generate** button. The program will begin creating payments. The process will be indicated by a progress bar.

4. Once all specified payments have been generated, the **Mass Payments** window will display the number of new payments created for each client.

5. You can adjust **the** settings and generate another set of payments.

NOTE: Once the payments have been generated, they can be opened and edited in the **Clients: Payments** window or the **Payments** tab of the **Client** window.

22. Custom queries

SQL queries can be made to TO3000 3D+ database to extract and export required data. This feature recommended for users with basic knowledge of SQL.

Structured Query Language (SQL) is a language of structured requests. It is intended for working with relational databases, which constitute the sets of interrelated data, stored in tables.

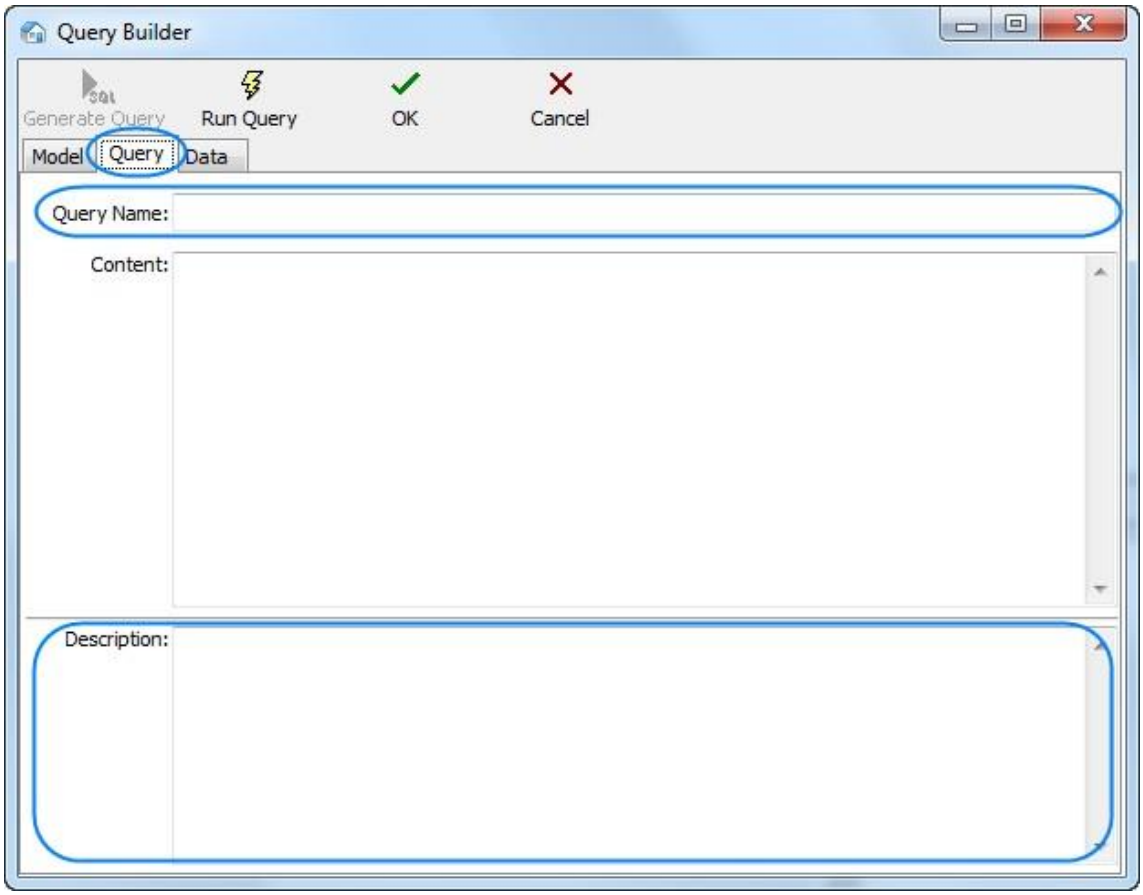
Currently SQL is a part of a large number of programs, executed on various types of computers. "Owing to its elegance and machine independence, as well as to the industrial leaders support in relational base technology, SQL was acknowledged the standard language and will keep this position in the foreseeable future."[2000, Mastering SQL, Martin Grubber]

22.1. Creating a query

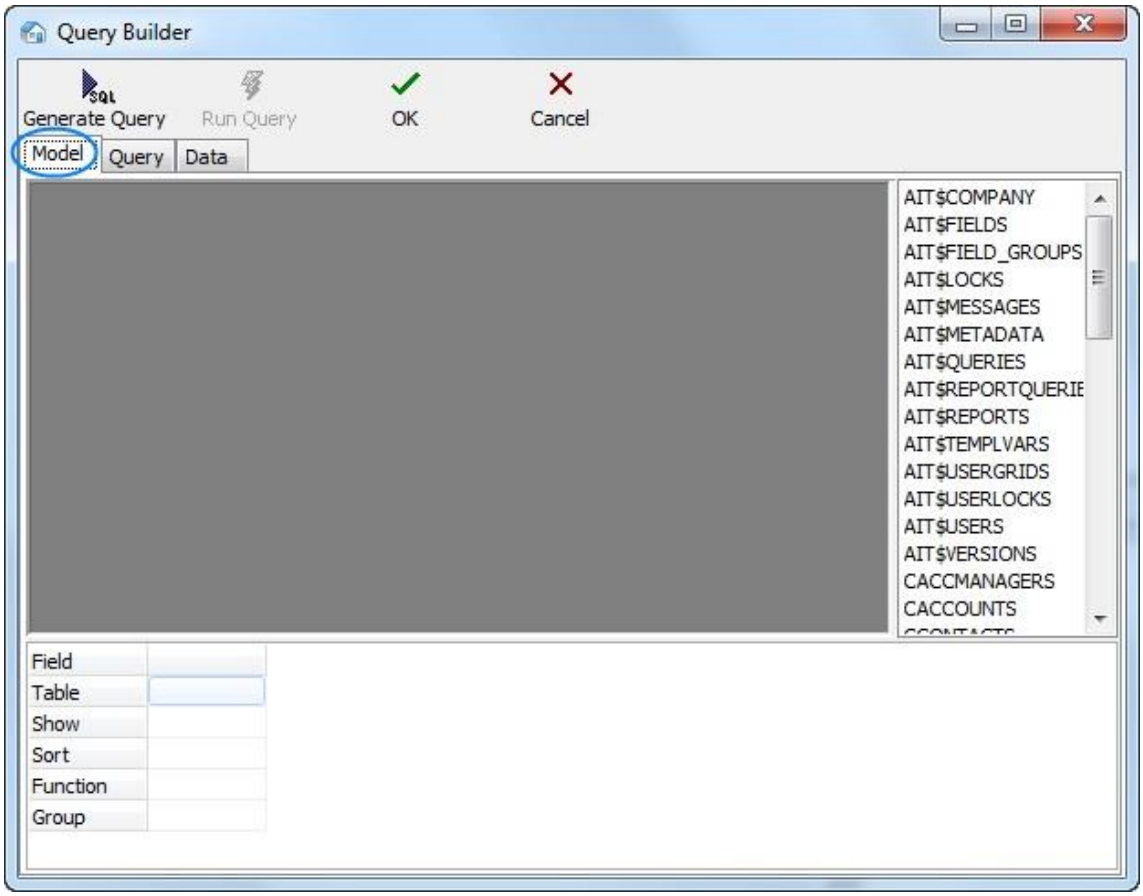
User queries are built and managed with the help of Custom Queries section of **Advanced Settings** window of .

1. Beginning creating a query

Click the **New** button and the **Query Builder** window shown below appears. Enter the name of your query in the **Query Name** field, and (optionally) description of the new query in the **Description** field.

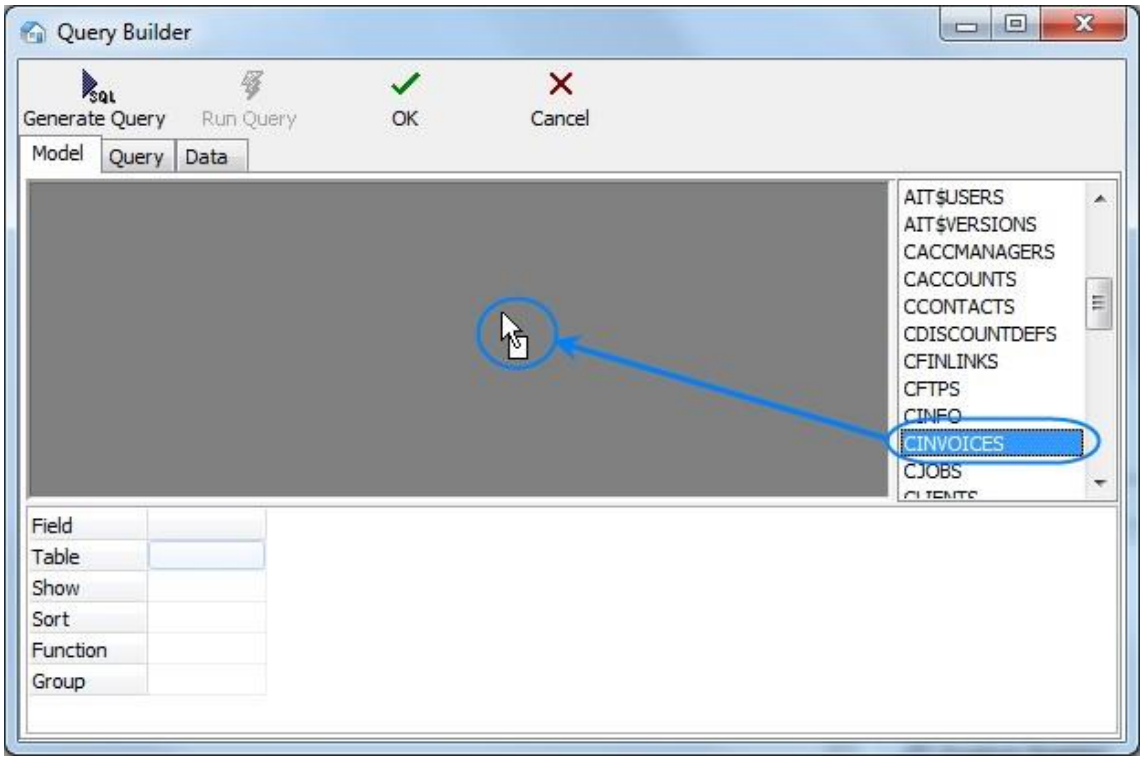


2. Beginning creating the model of the query Switch to the **Model** tab:



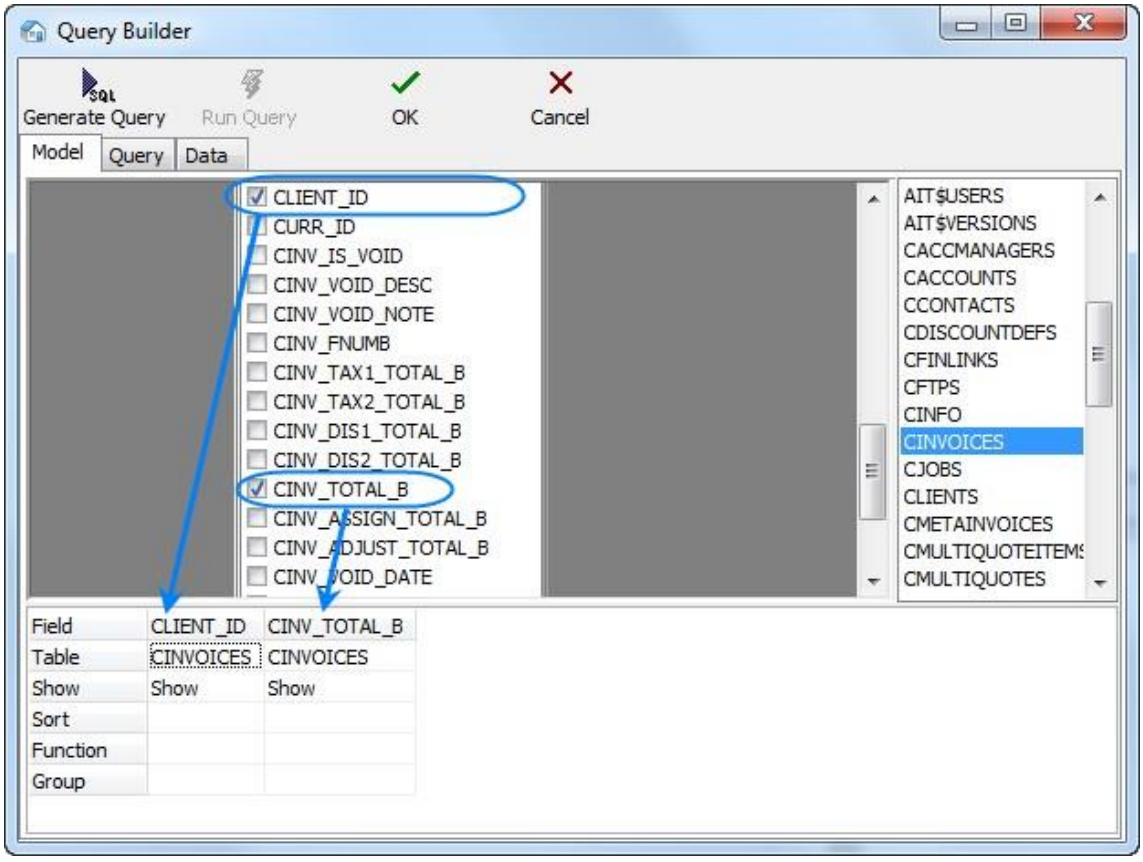
3. Selecting database tables

Locate the required tables on the list to the right (in this case – *CINVOICES* table) and drag them to the gray field of the **Model** tab of **Query Builder** window.



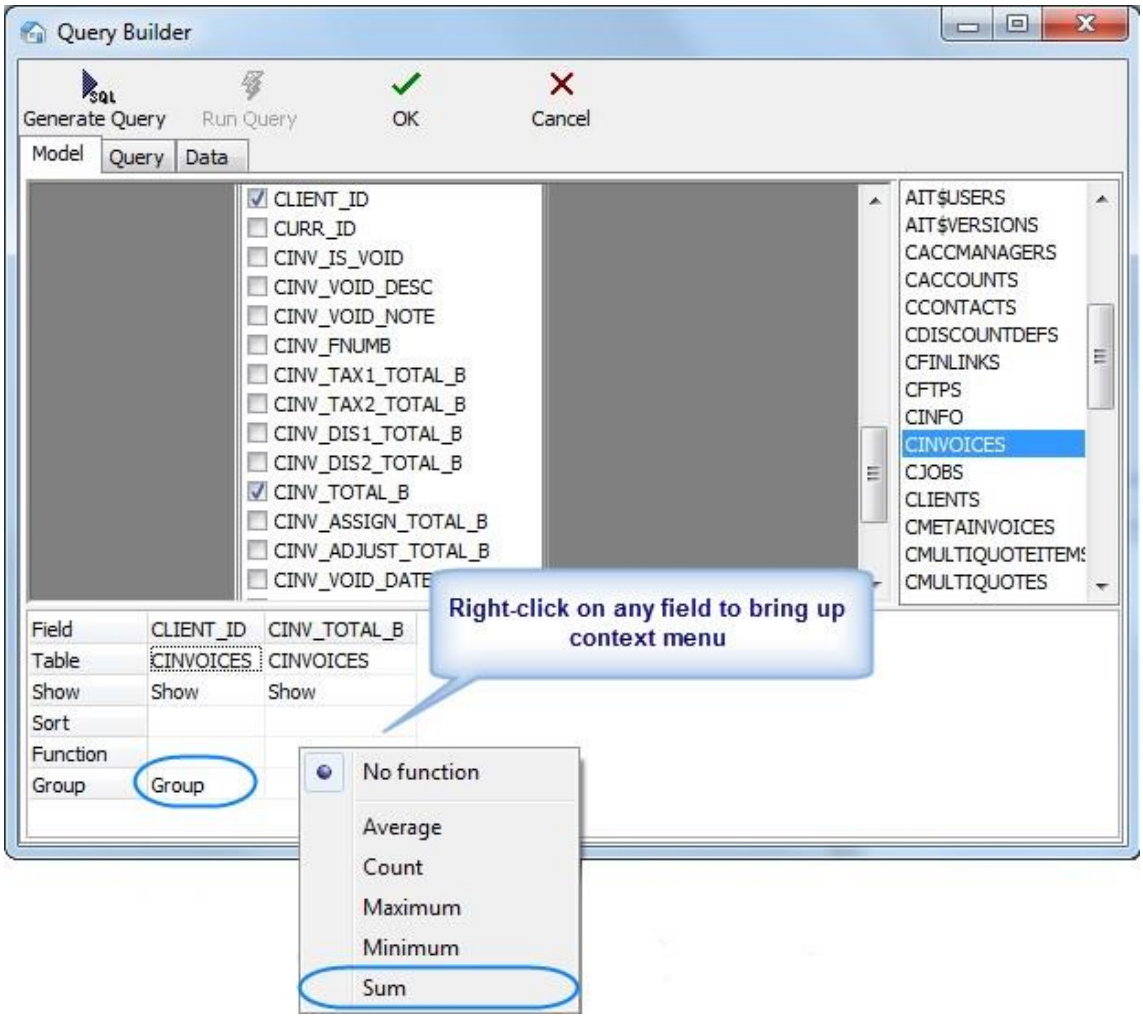
4. Selecting fields to be added to query

Select two fields, (in this case *CLIENT_ID* and *CINV_TOTAL_B* — client ID and sum of the invoice in basic currency) by clicking near the names of this fields in the table windows. These fields will appear in the lower area, which represents the list of selected fields.

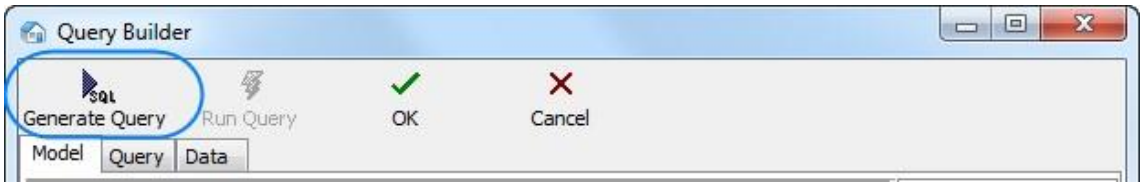


5. Assigning functions

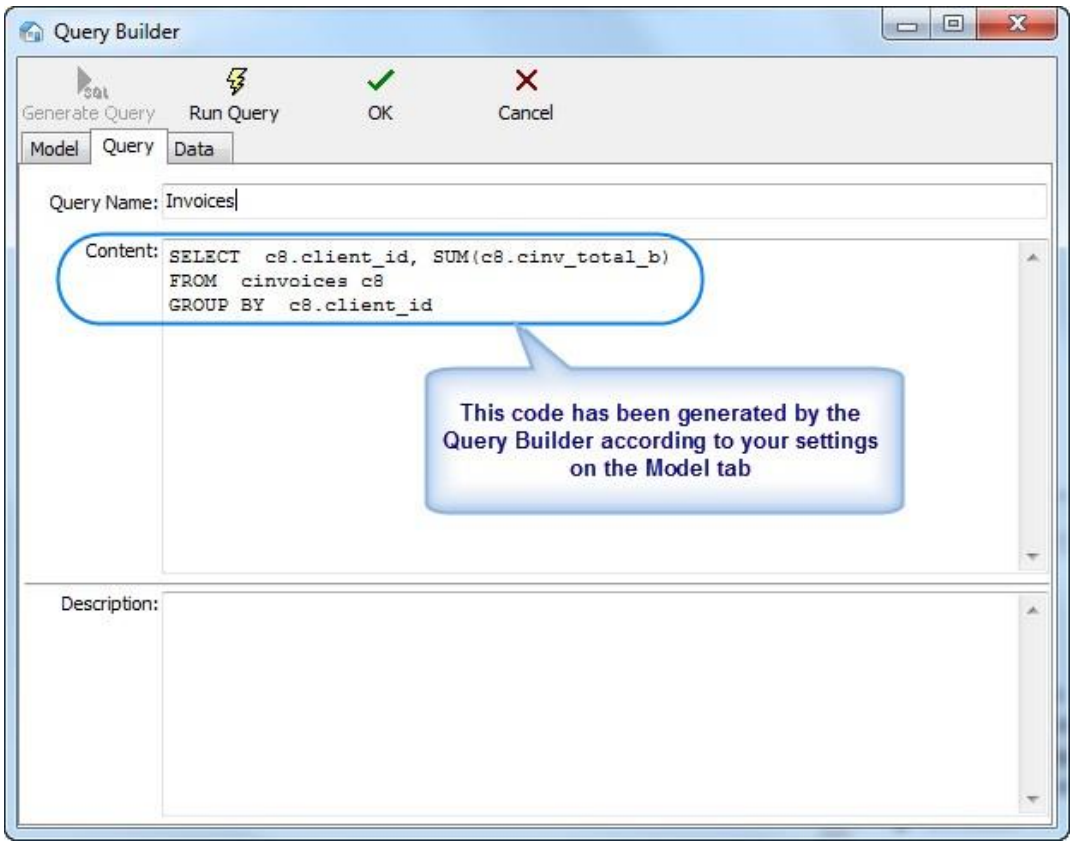
Right-click on the cell where fields CLIENT_ID (the selected field) and GROUP (SQL section Group by) intersect and select the **Group** option. Similarly in the cell of intersecting CINV_TOTAL_B and **Function** fields we select the **Sum** option:



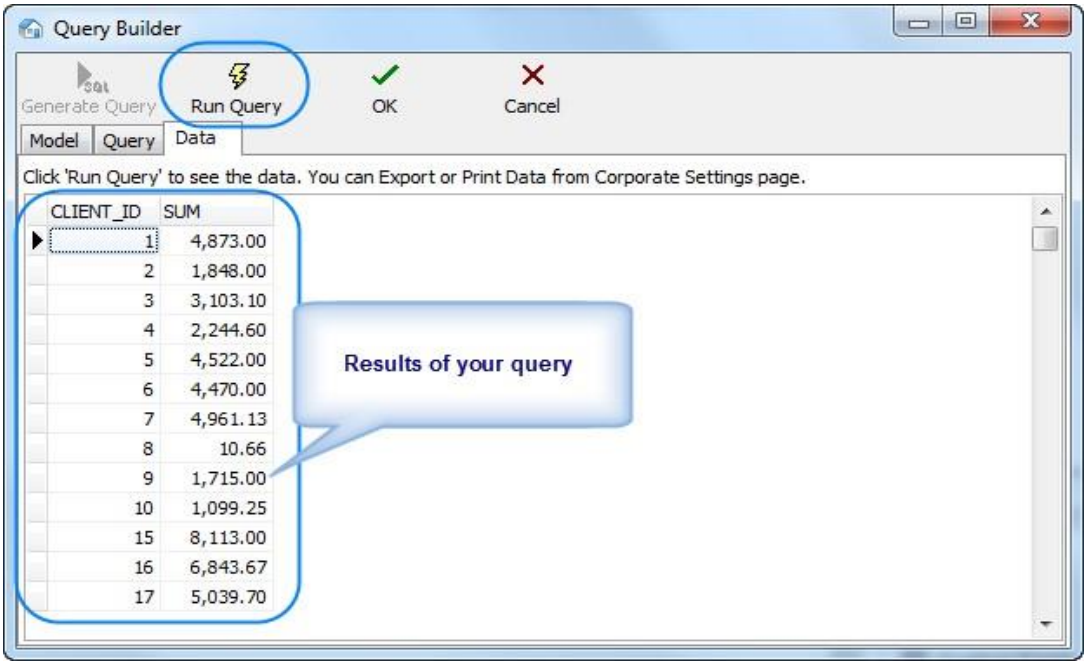
6. Generating query Click the **Generate Query** button.



Newly built SQL-query will appear.



Start executing the query (clicking **Run Query** button from the toolbar in the upper part of the window) and you will see the results.



Note: Although for most basic queries you are not required to write the SQL code of the query manually, any additional code can be added by SQL-versed users to fully customize their queries. For example, the following strings can be added to this particular query:

```
SELECT FIRST 10 c4.client_id, SUM(c4.cinv_total_b),

 (select client_name from clients where client_id = c4.client_id)

FROM cinvoices c4

GROUP BY c4.client_id

ORDER BY 2 DESC
```

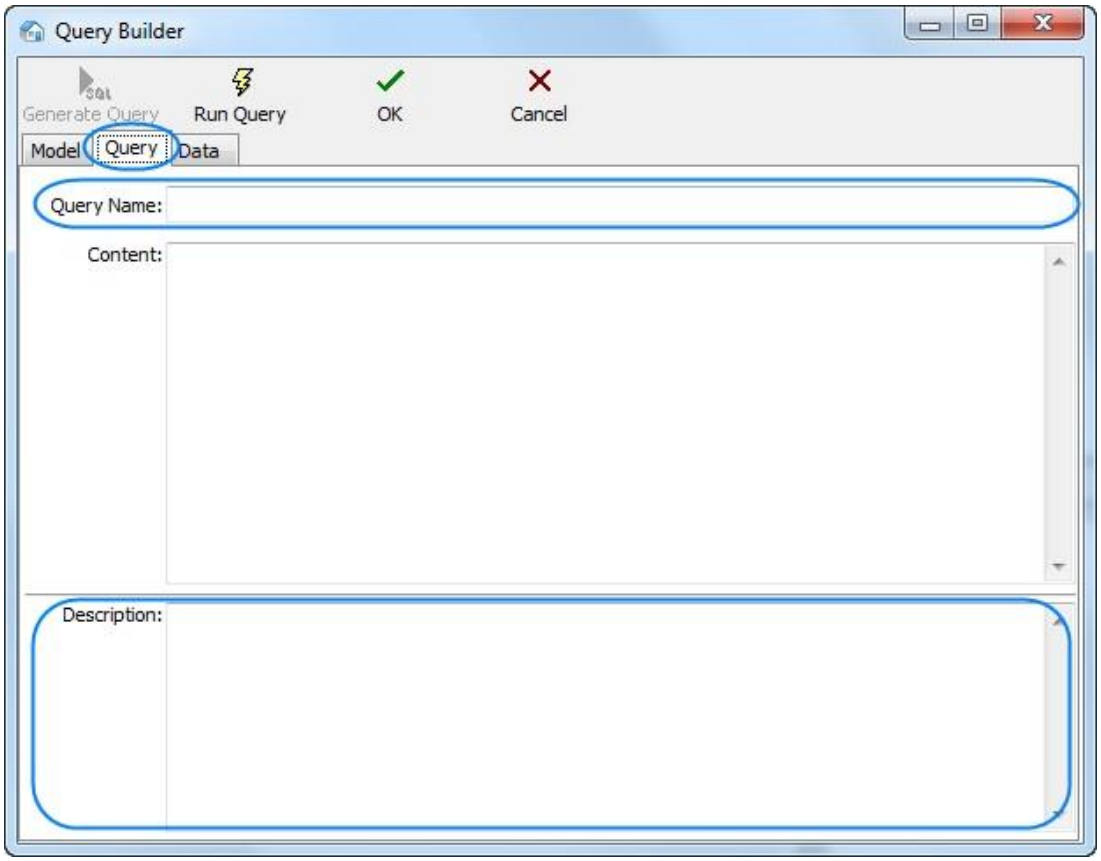
In simple words it will mean the following: To select first ten clients (first 10 client_id) by counting the sum of invoices and display them in the order of sum reduction (ORDER BY 2 DESC).

Click **Run Query** button once again to see the new result.

Note: If you click **Generate SQL** after editing the query manually the query will be rebuilt and the results of your work will be lost.

7. Saving newly created query

To save the query model switch to the **Query** tab, specify the **Query Name** and **Description** (optionally) and click **OK** button.



23. Custom reports

23.1. Accessing reports

Custom reports are used to extract and view consolidated and summary printable information from the TO3000 3D+ database.

To use custom reports, go to the Reports section of TO3000

For more information, please see: Static reports

23.2. Managing custom reports

23.2.1. Custom Reports settings

Custom reports can be created, edited and deleted via the **Advanced settings** window.

1. Click Advanced Settings in the Backstage view;
2. Click the **Reports** section to open the *custom report* management options.

23.2.2. Custom report options

The following options are available for custom reports:

- The **New\Edit\Delete** buttons can be used to create\modify\delete the selected report.
- The **Edit Details** button provides access to the **Edit Custom Report** window where you can change report name and description.
- The **Preview** button opens the **Preview** window where you can see how the selected report would look on paper and print it if needed.
- The **Load** and **Save** buttons will allow you to download new reports from .PX15 report files (*importing*) and save the existing reports to *.PX15* files (*exporting)*.

NOTE: The custom reports displayed in the **Reports** section of the **Advanced settings** window, are the ones currently integrated into the TO3000 3D+ database. The *PX15* files are used solely for export-import purposes, thus deleting a *PX15* file from *C:\Users\Public\Documents\AIT\TO3000, Version 3D\Reports* will not delete any of the reports in the database.

23.2.3. Exporting a custom report

To *export a custom report*, save the required report in a .PX15 file. This file can later be imported into another TO3000 3D+ database.

1. Select the required ***custom report*** in the list.
2. Click the **Save** button.
3. Specify the name and location for the *PX15* file being saved.

23.2.4. Importing a custom report

You can import a custom report to your database from a *PX15* file.

To *import a custom report*, use the *PX15* file to load the required report.

1. Save the *PX15* file being imported into the *C:\Users\Public\Documents\AIT\TO3000, Version 3D\Reports* folder.

2. Click the **Load** button.

3. Locate the *PX15* file being imported, select it and click the **Open** button.

23.2.5. Editing a custom report

To make changes to a custom report, select this report in the list and click the **Edit** button. This button opens the **FastReport** window (report designer interface).

The FastReport designer is a complex tool intended for IT specialists. It requires some basic *SQL* and *Delphi* knowledge. A step-by-step creation of simpler reports is described in the Example: creating a report topic.

For detailed information, please visit the Fast Report Inc. web-site: http://www.fast-report.com

23.3. Example: creating a report

This topic will cover the process of creating a simple custom report.

Example:

To *create* a new *custom report*

1. Click menu **Settings > Advanced**;

2. Click **Custom Reports** on **Advanced Settings** window.

3. Click **New** button; enter report name and description in the **New Custom Report** window and click **OK**.

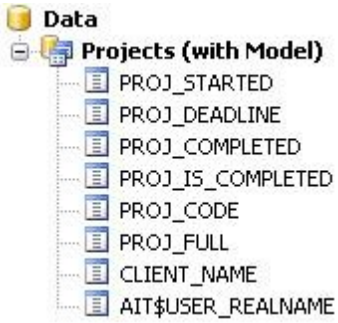
4. Add data which should be used in the report by clicking menu **Report>Data** in **FastReport** Designer window (it will open automatically, once you click **OK** button).

This will open **Select Project Datasets** dialog window, in which all your Custom Queries are displayed. Select the required queries by selecting check boxes in front of their names. For this example we selected **Projects (with Model)** query, since we are composing a "Projects report".

Click **OK** button to confirm selection.

Note: You can create your own custom queries with the help of built-in query builder. Any custom queries created this way will appear in this dialog window.

5. Now, contents of the selected query are displayed in the **Data** field to the right:

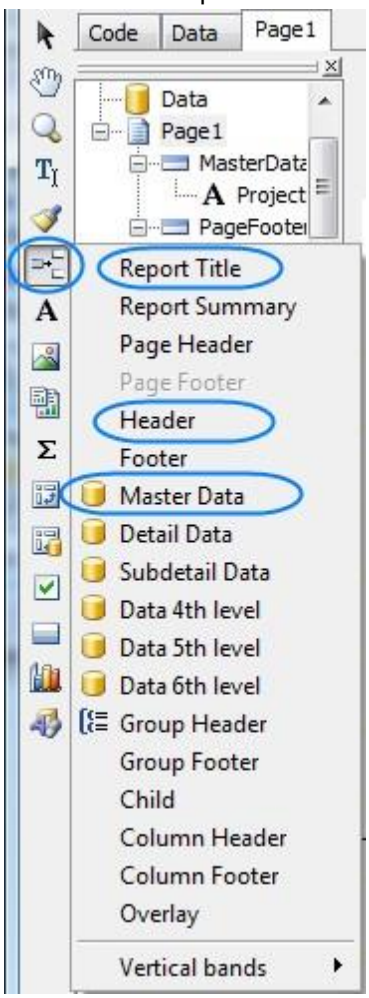


These are the fields from TO3000 3D+ database, which have been added to the query you selected. In this particular case, the fields are those, containing project names (*PROJ_FULL*) and codes (*PROJ_CODE*), dates of project timeline (*PROJ_STARTED*, *PROJ_DEADLINE* and *PROJ_COMPLETED*), information as to whether project has been completed or not (*PROJ_IS_COMPLETED*) and corresponding client names (*CLIENT_NAME*).

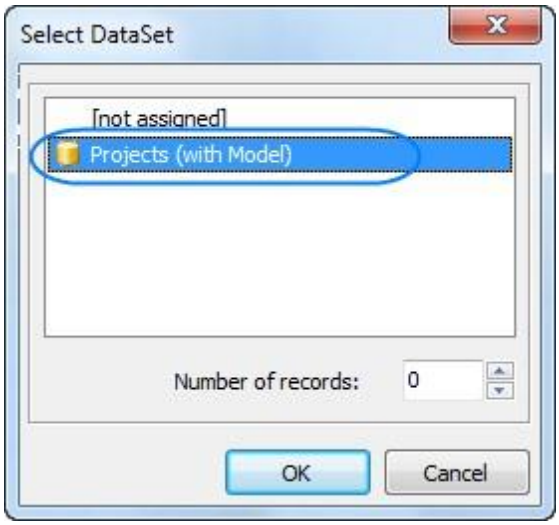
6. Begin designing your report by placing *Data Bands*.

These “bands” bind report elements together, specifying their location on the page relatively to page itself and to the other bands. More detailed description of the bands can be found in FastReport User Manual. For this particular report you will need to use only few of the bands available.

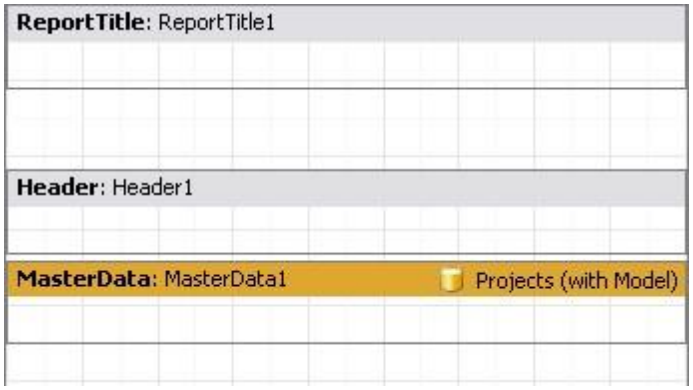
6.1. Click **Insert Band** button and select **Report Title** band. This will place mentioned band to your report page. Click **Insert Band** button again and select **Header band** to place it.



6.2. Click **Insert Band** button one more time and select **Master Data** band to place it in your report. When placing **Master Data** band select your **Projects (with Model)** query when prompted to do so:

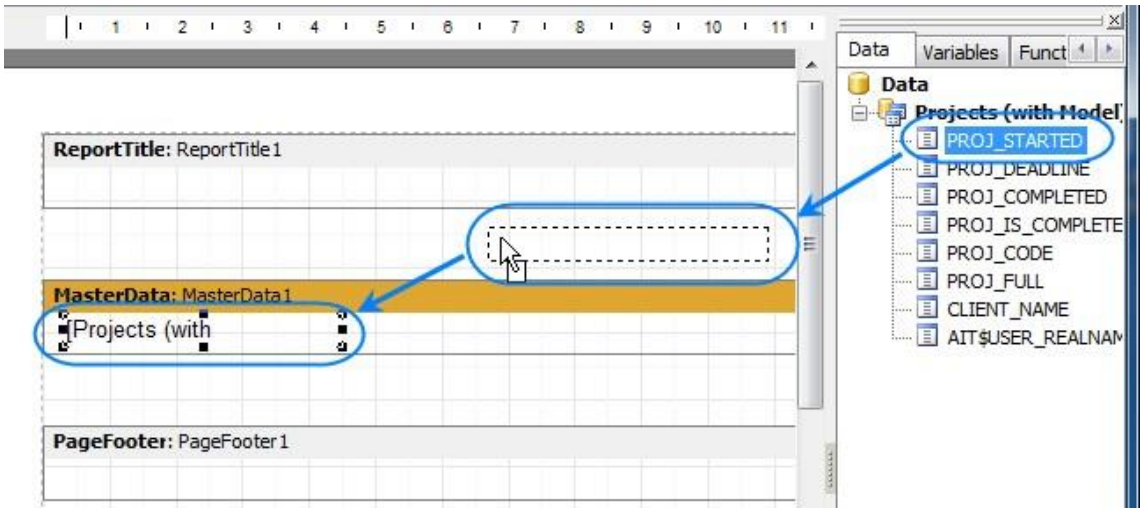


Your report page should look approximately like this:



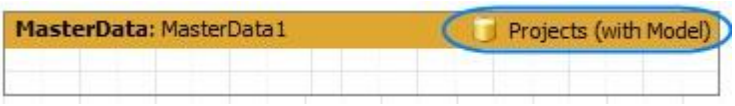
7. Adding data to **Master Data** band.

To add a variable data to your report, you will need to drag-and-drop the required fields from your query to the **Master Data** band.



Please note that any **Master Data** band can be linked to certain dataset (or query in this case) only, so in case you have more than one query, please be sure to drag and drop fields only to that **Master Data** band which has been linked to this query.

For example, the **Master Data** band below can contain fields from Projects (with Model) query,



Drag sequentially the following fields from the **Data** area and place them inside **Master Data** band in a row:

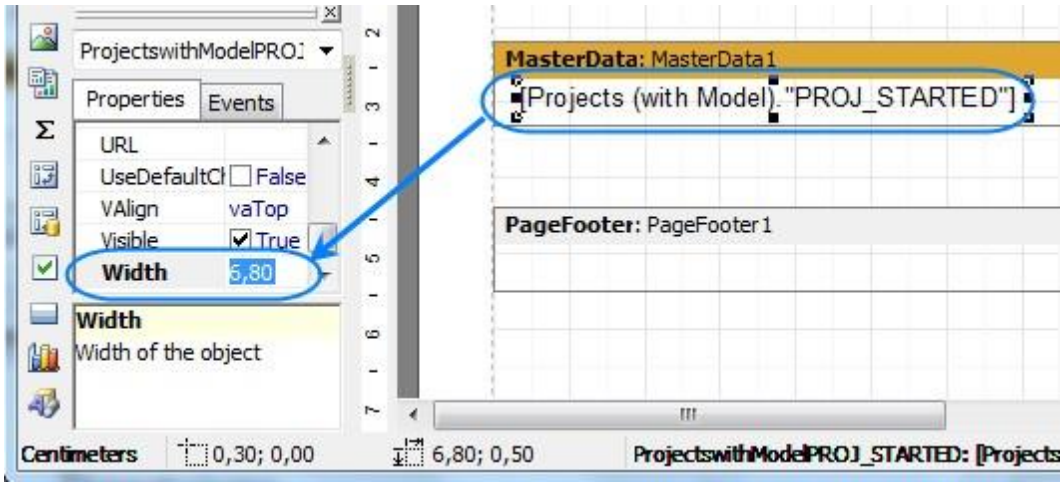
PROJ_FULL, CLIENT_NAME, PROJ_DEADLINE

When placed into your report, the fields take form of text objects, like:

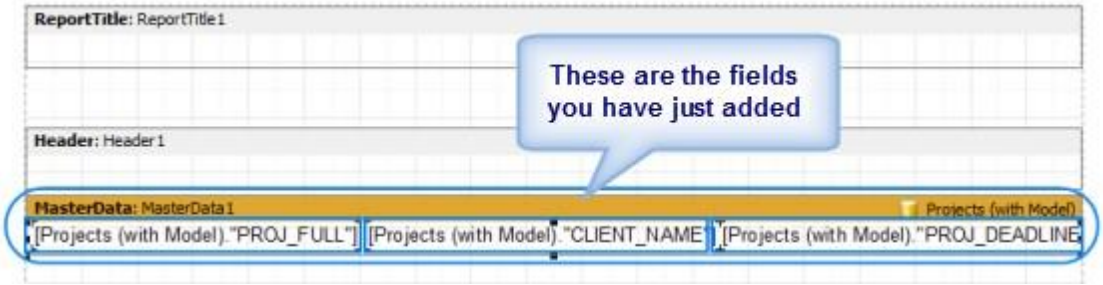
[Projects (with Model)."PROJ_FULL"]

These act very much like text variables in TO3000 3D+ RTF templates.

Note: Some of these objects may be very wide. Please try adjusting their width by dragging the borders of these objects. Alternatively, please try entering exact object length be selecting it and typing their width in **Properties** area:

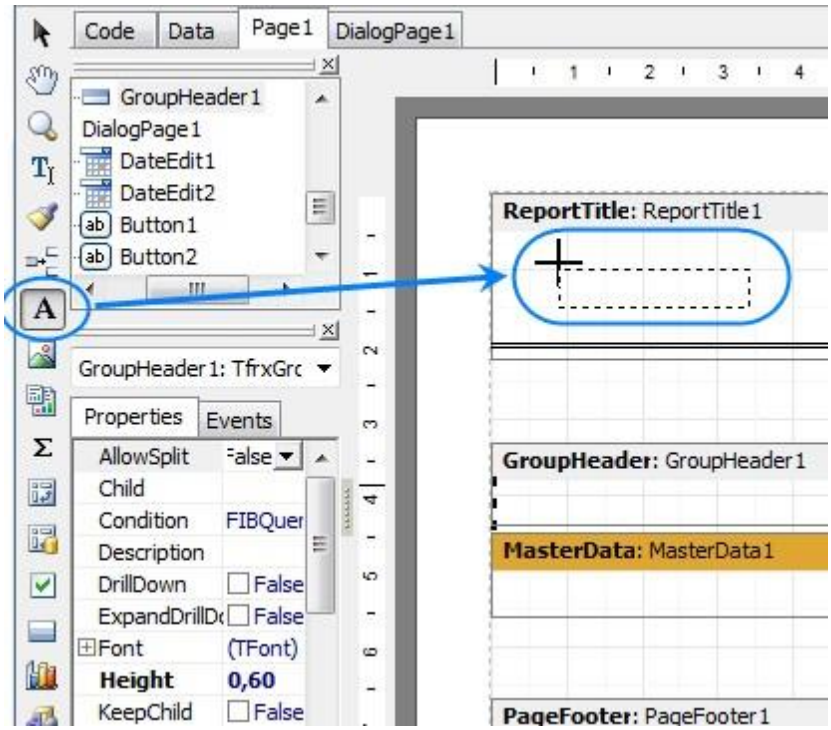


Once all the data has been added, your report should look like this:

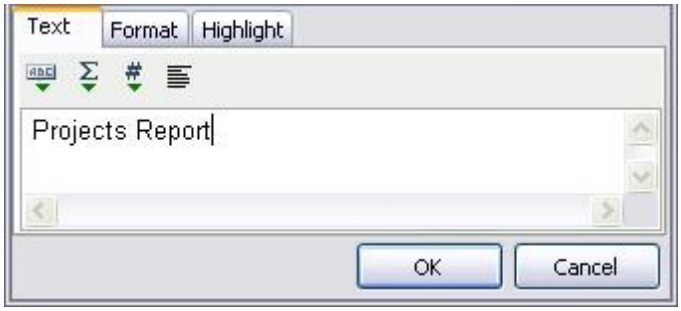


8. Adding stationary data to other bands.

8.1. Add a header for your report by clicking **Text object** button and placing the object on your report, within the **Report Title** band.

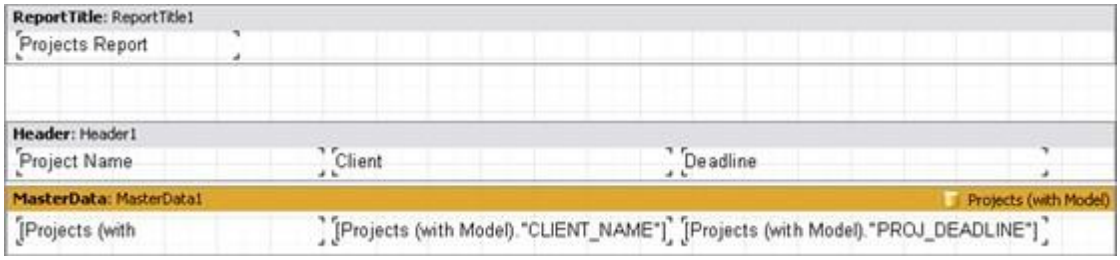


8.2. Type the header for your report in the memo window which appears.



8.3. Data will be displayed in your **Master Data** band in columns (each indicated by a field from the query). Add the names of these columns right above the query field objects in your **Header** band: *Project name*, *Client*, and *Deadline* the same way you added the header text object.

After this your report should look as follows:



9. Preview your report by clicking **Preview** button. Your report preview will be displayed in the **Preview** window.

Note: You can further configure style of your report by configuring the style of text objects. Select required text object and adjust its format in the **Properties** area to the left.

10. Save your newly created report by clicking **Save** button and close report designer.

New report is now ready to be used.

If you want to save this report in a separate file in the **Report** folder of TO3000 3D+(so that you can send it to other TO3000 3D+ users), select the report in the list and click **Save** button.

24. Other Products by AIT

AnyCount

Word Count, Character Count, and Line Count Software

AnyCount is an essential timesaving product for any translation business. It produces quick and exact automatic counts both in words and in other volume units (characters with spaces, characters without spaces, lines, pages, custom units) for all common file formats. AnyCount counts words — you count money!

Web-site:

http://www.anycount.com

ExactSpent

Easy and Exact Time Tracking Software

ExactSpent is an efficient time management software that enables you to calculate exact time you spent on particular job. You can track multiple jobs for multiple clients in a single place. The software will help you get organized, increase your productivity, and make better use of your time. ExactSpent allows you to see clear picture of all your tasks and time expenses. Let you rule time, not time rules you.

Web-site:

http://www.exactspent.com

Projetex

Project Management Software for Translation Agencies

Projetex is a Project Management software for translation agencies. It is a flagship product by AIT being used by 200+ translation agencies around the world. Our customers have already appreciated how Projetex simplifies task of corporate and freelance workflow management, data and files sharing within a translation agency.

Web-site:

http://www.projetex.com

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