Translation Office 3000 3D Workflow Modes Guide

1 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 without necessity to create a project..

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

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

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

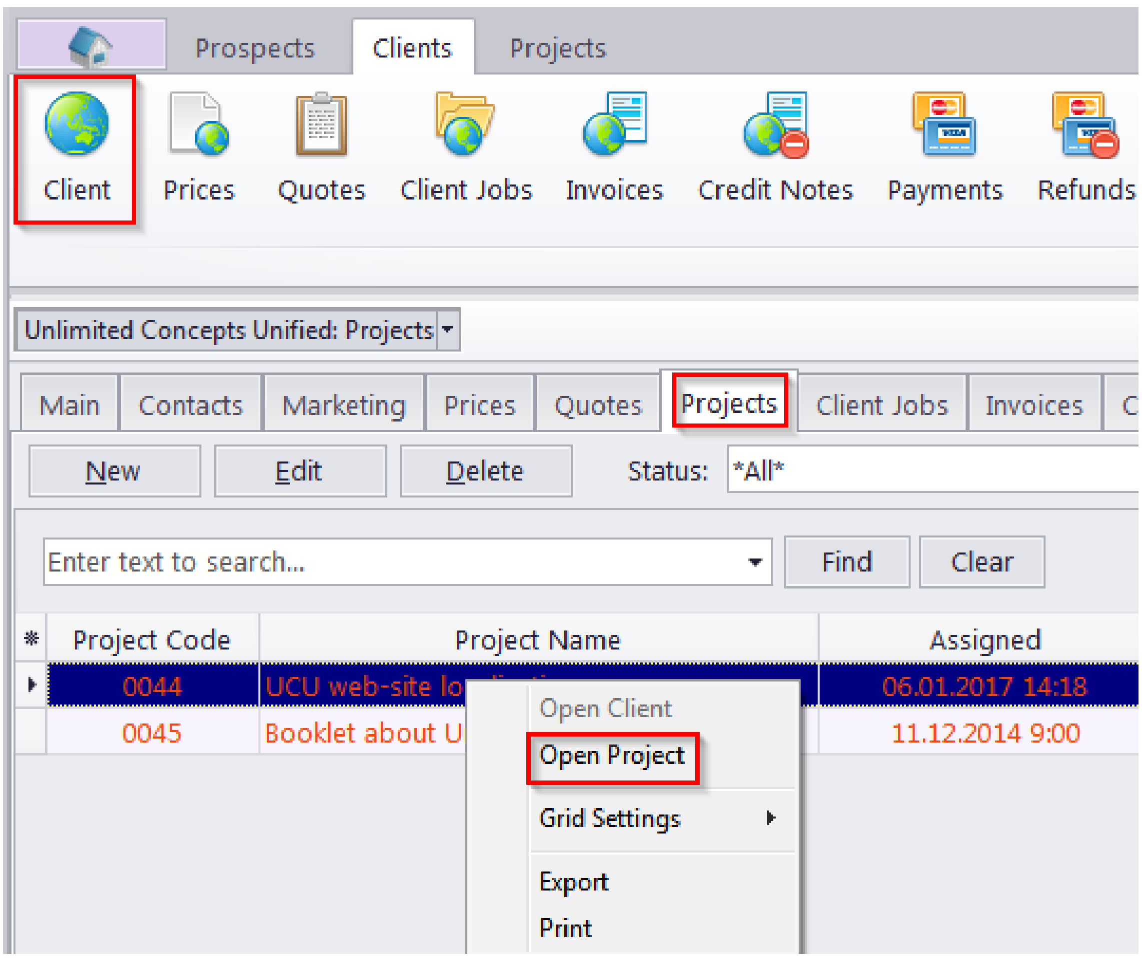
If you have worked in **With Projects Mode** and then changed Workflow Mode to **Without Projects Mode**, all your previously created *client jobs* will be displayed in the single list on **Clients** > **Client** > **Client Jobs** tab.

2 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 **Set now**.

This mode has the following workflow:

1. Create a *client*. For this go to **Clients** > **Client** and click **New Client** button.
2. Create a *project* of this *client*. For this go to **Projects tab** of the client and click **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 task for one job. For example, if you make 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 *group of services*.

- Translate jobs on several languages.For example if you make 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 translation, proofreading and 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.

3 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 click **Set now**.

This mode has the following workflow:

1. Create a *client*. For this go to **Clients** > **Client** and click **New Client** button.
2. Create a *client jobs* of this *client*. For this go to **Client Jobs tab** of the client and click **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 be not useful for freelance translators who:

- Group several jobs in a project.
- Perform several task for one job. For example, if you make 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 *group of services*.
- Translate jobs on several languages.For example if you make 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 translation, proofreading and English => German and English => Spanish are *services*.

4 Common workflow

After creation of *jobs* (see topics above) there is the following workflow:

1. After *jobs* has been completed, you can mark them as *completed*, entered to these jobs (Clients > Client > Client Jobs tab > Edit button). Then go to Clients > Client > Invoices tab and create a new invoice, clicking New button. Add all necessary jobs to this invoice, select taxes, discounts and click Ok button.

2. After a payment for this invoice has been received, go to Clients > Client > Payments tab, clickNew button, type a value of this payment, switch to Linked with Invoices tab, click New Link button and connect this payment with appropriate invoices. Click Ok button. Alternatively, you can click **Mark as Paid** button in **Edit Invoice** window to create 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 **Projects > Project > Main** tab or **Clients > Client > Projects** tab.

If you need to send a *quote* to a *client*, go to **Clients > Client > Quote** tab and click **New** button. Type a name of this *quote* and add all necessary *jobs* there. After your *quote* has been accepted, go to **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 **Clients > Client > Quote** tab, select an appropriate *quote,* click More... (hamburger ivon) and select the **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.