Protemos Freelance Quick Start Guide
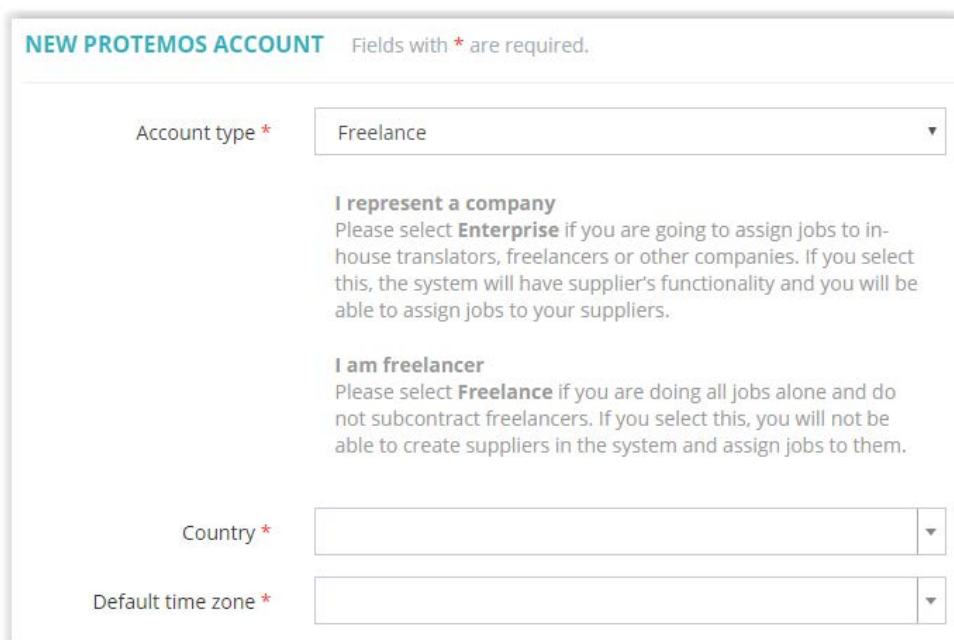
Contents

Get started with Protemos

To start working with Protemos, create your account by completing the following steps:

1. Press **Sign up** button at the website www.protemos.com

2. Go to the Create Account page:

3. Fill in all the boxes and click the **Sign up** button.

    Company: Select this option, if you will pass your orders to other vendors (i.e. you are a translation agency or a freelancer who distributes work among the translators). You can create many users with different roles and access rights.

    Freelance: This is a light and free version of the system. It will suit those who complete all the work on their own and do not pass it to other vendors. The interface does not have capability to assign projects to subcontractors. Also, other users can't be added. Upgrade to Company version is possible, if desired.

4. After pressing SIGN UP button, the account will be set up and you will see a welcome screen to start working with the system:

Welcome!

Thank you for creating Protemos account!

Before we can start working, we need to adjust some system values. Let's do it...

Ok, let's get started!

5. Press **OK, let's get started!** and you will pass into system setup wizard:

6. Enter data for each menu entry:

Services are the services you provide. In addition to translation and proofreading, you can indicate any other services such as layout design, OCR, etc.

Language pairs are your language pairs.

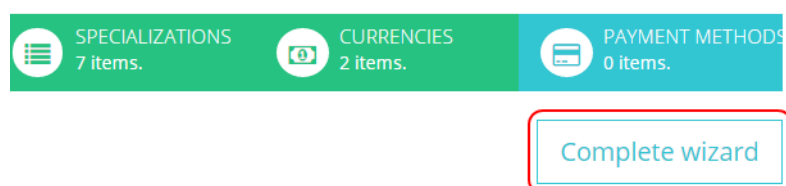**Units** are units to measure the volume of work. For example, hours, words, pages, etc.

Currencies are the currencies you work with such as US dollars or euros. Indicate the main currency here. The system will use it for accounting.

Payment methods are the payment details. They will be used in the invoices the system will generate to send your clients.
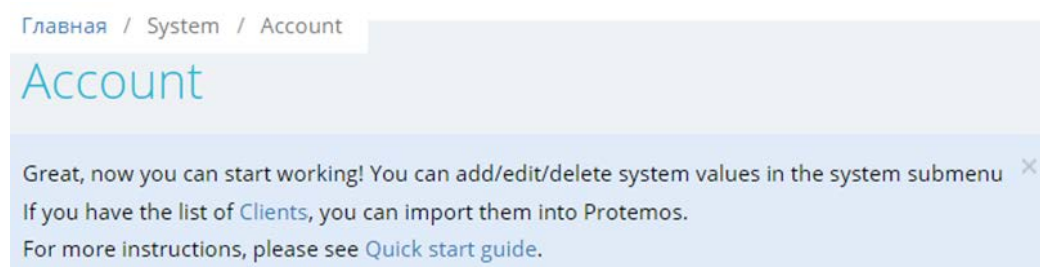
To navigate in the menu entries, use a dedicated navigation menu:
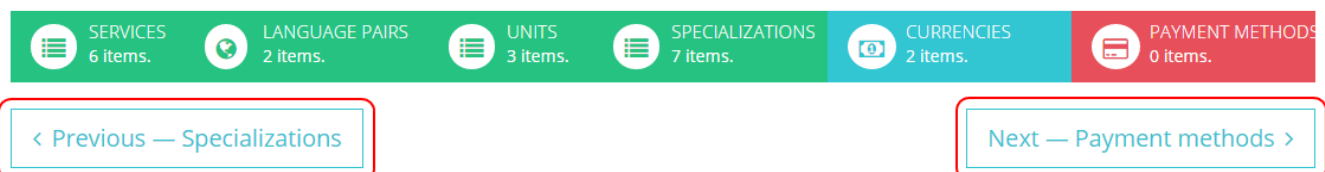
7. Having completed all the entries, press the **Complete wizard** button:

8. The following screen will be displayed:

Главная / System / Account

Account

Great, now you can start working! You can add/edit/delete system values in the system submenu

If you have the list of Clients, you can import them into Protemos.

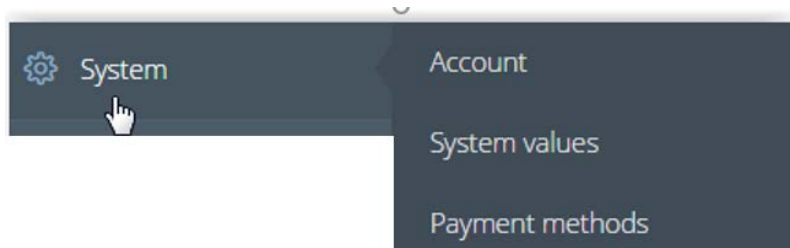For more instructions, please see Quick start guide.

This means that your account has been created and you can start working with Protemos.

However, before you start working with the projects, add your clients in the system.

System values settings

You can change and set System values in the System menu:

Each menu screen is described below.

System =>Account

Use **Update** and **Change** buttons to renew default account settings:

*Note: To set Payment methods, go to **System => Payment methods**.*

System values contains several submenus:

Languages. Use this menu to select the language pairs you work with:

Services. Use this menu to select the services you provide:

Specializations. Use this menu to select specializations you work with:

Units. Use this menu to select units to measure the volume of your work (words, hours, pages, etc.):

Currencies. Use this menu to add currencies that will be used in the system. For example, one client can pay in US dollars while others can choose euros and you can pay to vendors in local currency.

To set any currency as default, press the **Set as default** button in the respective row. From now on, all the financial reports and balances will be displayed in the selected default currency.

Note: Protemos is connected to the currency conversion service so the exchange rate is updated on a daily basis. That's why you can always see the correct summary in your default currency.

Payment Methods. Enter your payment details here, so the clients can pay you:

Payment methods

Method name / Email	Payment type	Description	Enabled	In use	
translator.helen.technolex@gmail.com Default	PayPal		Yes	No	Update
translator.helen.technolex@gmail.com	Skrill		Yes	No	Disable Update Delete

You can enter many payment methods: PayPal, SWIFT, MoneyGram, wire transfer, etc.

Add clients

You can add clients manually, one by one, or import their list from an Excel file. These options are described below.

Adding clients manually

To add a new client, click the **Clients** menu on the side panel and then press the **New client** button:

Enter information about your client in the displayed screen. It consists of several sections.

Use the **General info** section to enter general information about a client:

Press the **Save** button to display the client entry:

Press the **Update** button to renew the information.

Use the **Primary user** section to enter client's contact person.

If the client has several contact persons, they can be entered in **Contact persons** tab.

You may also note different **Prices** for this client and attach **Documents**.

Import clients from file

If you already have the list of clients, contacts and prices, you can easily import this information. So, no need to enter such information manually.

1. Go to the **Clients**.
2. Press **Import from Excel** button:
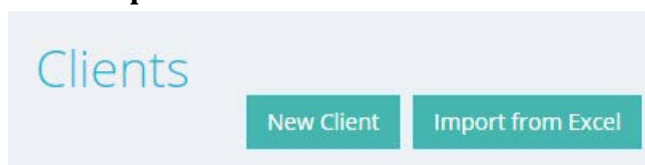
3. Download the template file for import and fill it out. Then upload it to the system and import by pressing the **Submit** button.
4. If the filled file has no mistakes, the information from it will be imported into the system.

Otherwise, the file will be returned with indication of the found mistakes. Correct the mistakes, to be able to import the information again.

The client information is imported step-by-step. Select "Download Excel template" and copy in downloaded template your information about clients, contacts and prices.

Add new translation project

After setting up the system and entering the clients and vendors in it, you can start new projects.

For illustration purposes, suppose you have Smart Gadget as your client. They have sent you the 20,000-word translation request from English to French asking to complete it in 2 weeks. Let's add this project in the system.

1. Start creating a project by clicking **Add new => Project**:
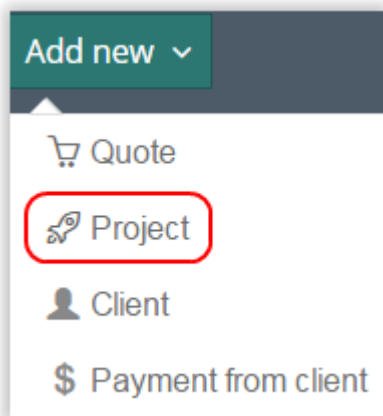
2. Enter your project information and press **Create** button:

3. The project page will be displayed with the following tabs:

4. Now you need to upload the files received from the client. To do so, go to the **Files** tab:

5. Upload the needed files by pressing the **Add input files** button.
6. Next, enter the volume of work and the receivable from the client. To do so, go to the **Finances** tab.

RECEIVABLES FROM SMART GADGET — Add new receivable

7. Press the **Add new receivable** button and enter the work volume and price:

Add new project receivable

DETAILS

Project	P13735 – Corporate web site
Specialization	Marketing
Client	Smart Gadget
Total	**4000.00 EUR**

RECEIVABLE DATA   Fields with * are required.

PO number	
Language pair *	English (United States) – French (... × ▾
Service *	Translation × ▾
Unit amount *	20000
Unit type *	Word × ▾
Price per unit *	0.2
Currency *	EUR - Euro × ▾
Note	

☐ Add price for this client

8. Enter the purchase order number sent from the client in the **PO number** box. If the client has not provided such number, you may leave this box unfilled.

If you want system to memorize this price, go to **Client => Smart Gadget** (select your client) **=> Prices => Add new price** and add the tariff for this client to the database. It will be displayed next time you enter a similar order.

You can enter several receivables for a project.

9. The project has been created.
10. When files translated, you can add them in the Protemos and **Complete** the project. Go to **Projects => Corporate web site** (select your project) **=> Files => Add output files:**

11. Complete the project:
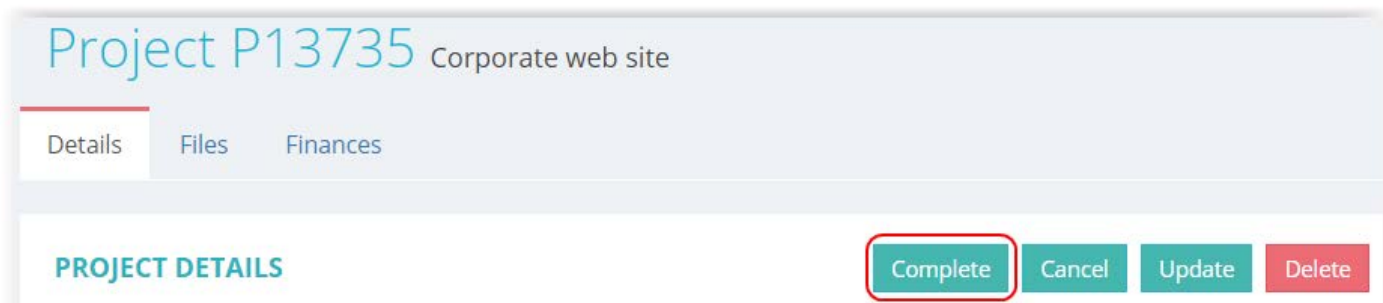
Note 1. *The number of projects in your system will be increasing with time so you won't want all of them to be displayed. Set up how projects are displayed in the list using filters.*

Create invoices for clients and control their payment

1. To create an invoice for a client, go to **Finances=> Receivables**:

2. The list of all the receivables will be displayed. Select the desired rows and press the **Invoice selected on this page** button:

Client receivables and creation of invoices

No filter applied

Showing **1-1** of **1** item.

Export to Excel

	Code	PO number	Invoice	Client	Project	Project status	Project deadline	Service	Language pair	Unit	Price per unit	Total	Currency
☑	PR17088			Smart Gadget	Corporate web site	Active	2016-11-10 15:00 *due через 13 дней*	Translation	English (United States) – French (France)	20000 Word	0.2	4000	EUR
									Total by currency			4000	EUR
									Grand total in default currency			4000	EUR

[Invoice selected on this page] [Invoice all by filter]   Receivables with the same **Client** and **Currency** will be linked to one **Invoice**.

3. The system will create an invoice and will display its page:

Client invoice – Ci2016-1302

Invoice has been successfully created.   ×

INVOICE DETAILS   Download as PDF   Send   Mark as sent   Update   Delete

| Client	Smart Gadget
Payment method	PayPal – translator.helen.technolex@gmail.com
Currency	EUR - Euro
Total	4000
Coverage by payments	Not covered
Created	2016-10-27 *Helen Prof*
Due date	2016-11-26 *due через 30 дней*
Notes to client	

4. You can do the following:
   – Edit the invoice using the **Update** button
   – Download the invoice as PDF file by pressing the **Download as PDF** button
   – Send the invoice to the client directly from the system by pressing the **Send to client** button

View the list of all the invoices in **Finances=> Invoices.**

This way you can track all the invoices from your clients and control their payment.

When a client pays the invoice, enter the payment in the system and connect it with the paid invoice. To do so, complete the following steps:
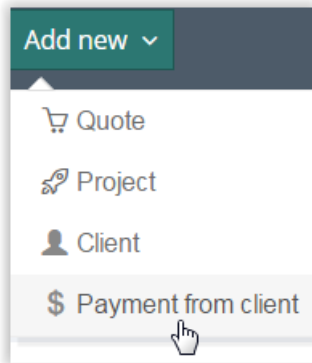
1. Go to the **Finances=> Payments** menu**:**
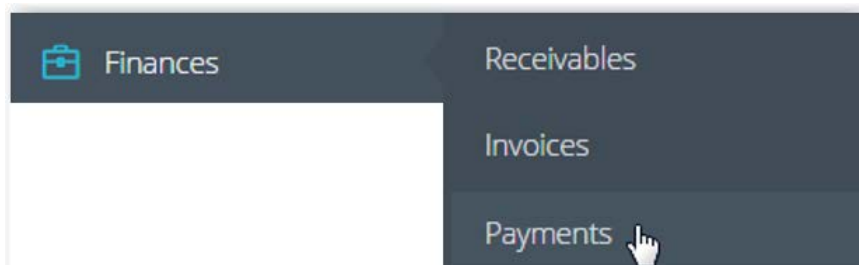
2. Press the **New payment** button:

Note: *Also, you can create a new payment from a client using the main menu:*

3. Enter the payment received from the client and select the invoices that payment covers from the list.

New payment from client

PAYMENT DETAILS   Fields with * are required.

Client *	Smart Gadget
Payment method *	translator.helen.technolex@gmail.com
Paid at *	2016-10-28
Currency *	EUR - Euro
Amount *	3500.00
Amount due of linked invoices	4000.00
Unlinked amount	0.00
Payment note	

UNCOVERED INVOICES   1 invoices found for Smart Gadget

	Invoice	Linked payments	Coverage by payments	Total	Paid amount	Amount due	Currency	Created
☑	Ci2016-1302		Not covered	4000	0	4000	EUR	2016-10-27

Save   Cancel

4. Press **Save**.

Now you have entered the payment in the system and completed the payment. In our example client has paid partially: 3500 of 4000 EUR, so he owes you 500 EUR. You can see it in **Finances=> Invoices:**

Client invoices

New invoice

No filter applied

Showing **1-1** of **1** item.

Export to Excel

Invoice	Linked payments	Client	Created	Sent	Due date	Coverage by payments	Total	Paid amount	Amount due	Currency
Ci2016-1302	CP596	Smart Gadget	2016-10-27	2016-10-27	2016-11-26 *due через 29 дней*	Partially covered	4000	3500	500	EUR
						Total by currency	4000	3500	500	**EUR**
						Grand total in default currency	4000	3500	500	**EUR**

When client pays the rest, you will add it as another payment (**Finances=> Payments)**,

Client payments

New payment

No filter applied

Showing **1-2** of **2** items.

Export to Excel

Payment	Linked invoices	Client	Payment method	Paid at	Coverage by invoices	Amount	Linked amount	Unlinked amount	Currency
CP598	Ci2016-1302	Smart Gadget	translator.helen.technolex@gmail.com	2016-10-28	Fully covered	500	500	0	EUR
CP596	Ci2016-1302	Smart Gadget	translator.helen.technolex@gmail.com	2016-10-28	Fully covered	3500	3500	0	EUR
					Total by currency	4000	4000	0	**EUR**
					Grand total in default currency	4000	4000	0	**EUR**

Then in **Finances=> Invoices** you will see fully coverage**:**

Client invoices

New invoice

No filter applied

Showing **1-1** of **1** item.

Export to Excel

Invoice	Linked payments	Client	Created	Sent	Due date	Coverage by payments	Total	Paid amount	Amount due	Currency
Ci2016-1302	CP596, CP598	Smart Gadget	2016-10-27	2016-10-27	2016-11-26	Fully covered	4000	4000	0	EUR
					Click the payment and receive more details					
				Total by currency			4000	4000	0	EUR
				Grand total in default currency			4000	4000	0	EUR
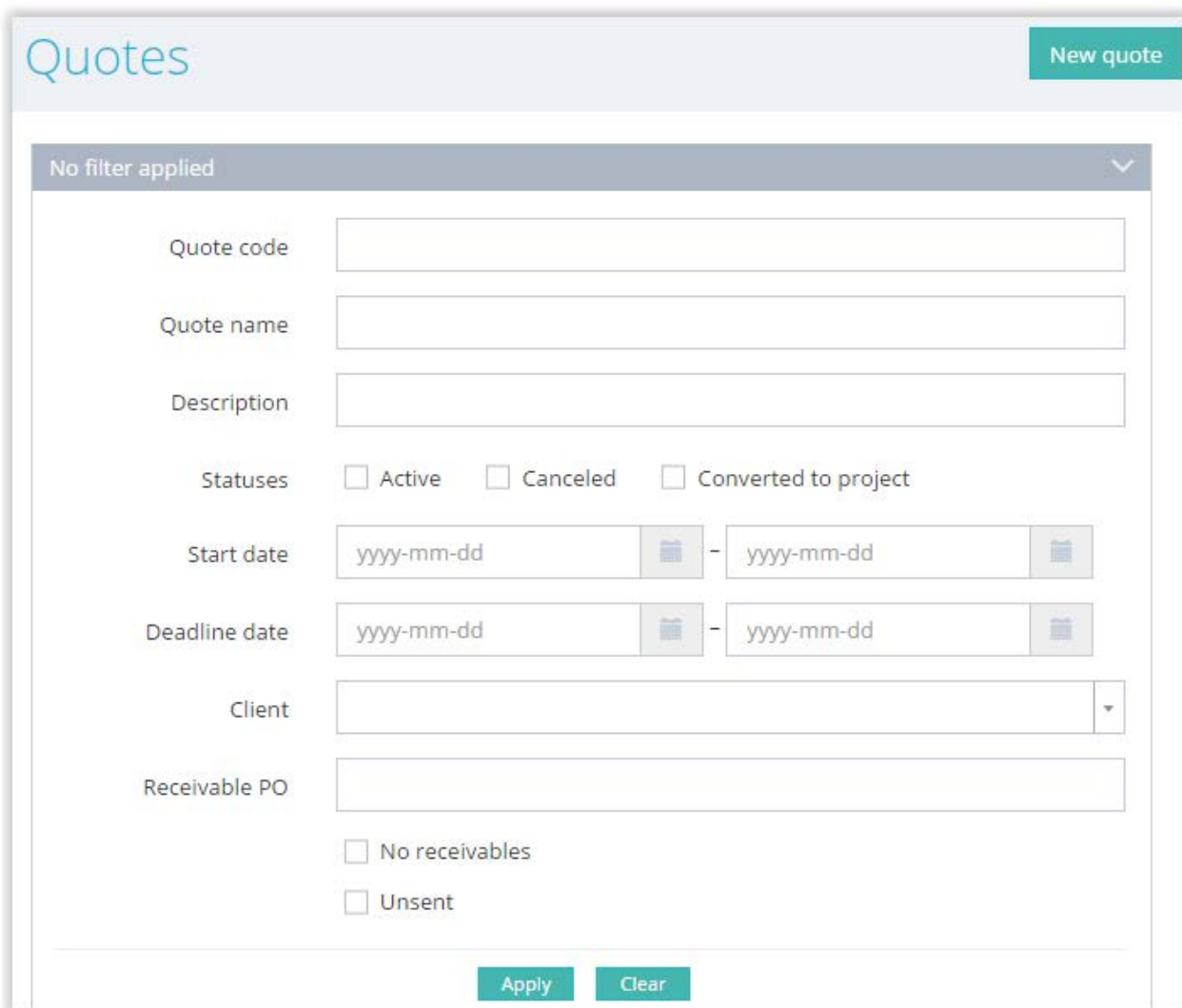
Filters

Filters are provided for most of the tables in the system. Use such filters to hide the information you don't want to be displayed.

Quotes filter

Quote code — displays only the projects with the code containing the entered value.

Quote name — displays only the quotes with the name containing specified text.

Description — displays only the projects with the description containing specified text.

Active/Completed/Cancelled — displays only the projects with specified status.
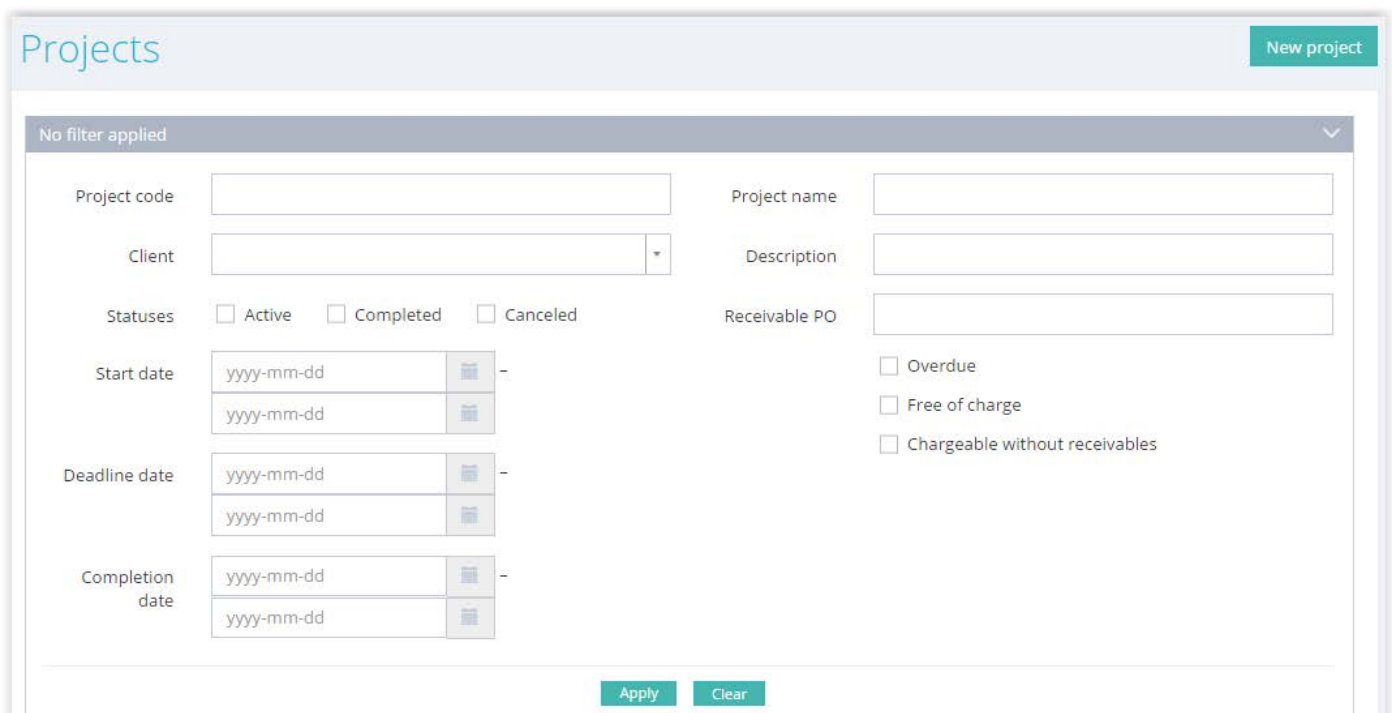
Start date — displays only the quotes which were started in specified period.

Deadline date — displays only the quotes with deadlines in specified period.

Receivable PO — displays only the quotes containing the entered PO number determined by the client.

Client — displays only the projects for a specific client.

Projects filter

Project code — displays only the projects with the code containing the entered value.

Client — displays only the projects for a specific client.

Active/Completed/Cancelled — displays only the projects with specified status.

Start date — displays only the projects which were started in specified period.

Deadline date — displays only the projects with deadlines in specified period.

Completion date — displays only the projects which were completed in specified period.

Project name — displays only the projects with the name containing specified text.

Description — displays only the projects with the description containing specified text.

Receivable PO — displays only the projects containing the entered PO number determined by the client.

Overdue — displays only the projects with expired deadline.

Free of charge — displays only the projects marked as free of charge.

Chargeable without receivables — displays only the projects with no receivables entered to pay by the client.

Filter of client receivables

Receivable code — displays only the receivables with the specified symbols in the code.

Client — displays only the receivables for the selected client.

PO number — displays only the receivables with the entered PO number.

Project name — displays only the receivables for the projects with the specified name.

Project statuses — displays only the receivables for the projects with the specified statuses (**Active**, **Completed**, **Cancelled**).

Project deadline date — displays only the receivables for the projects with the deadlines within the specified deadline range.

Filter of client invoices

Code — displays only the invoices with specified symbols in the code.

Creation date — displays only the invoices, which were created in specified period.

Due date — displays only the invoices with due dates in specified period.

Client — displays only the invoices for the selected client.

Not sent — displays only the invoices, which weren't sent.

No linked payments — displays only the invoices, which have no linked payments.

Not fully covered — displays only the invoices, which weren't completely paid.

Code — displays only the payments with specified symbols in the code.

Creation date — displays only the projects, which were created in specified period.

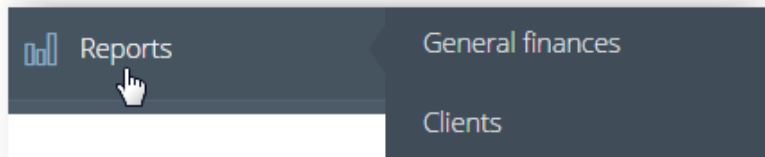**Deadline date** — displays only the projects with deadlines in specified period.

Vendor — displays only the payables for the selected vendor.

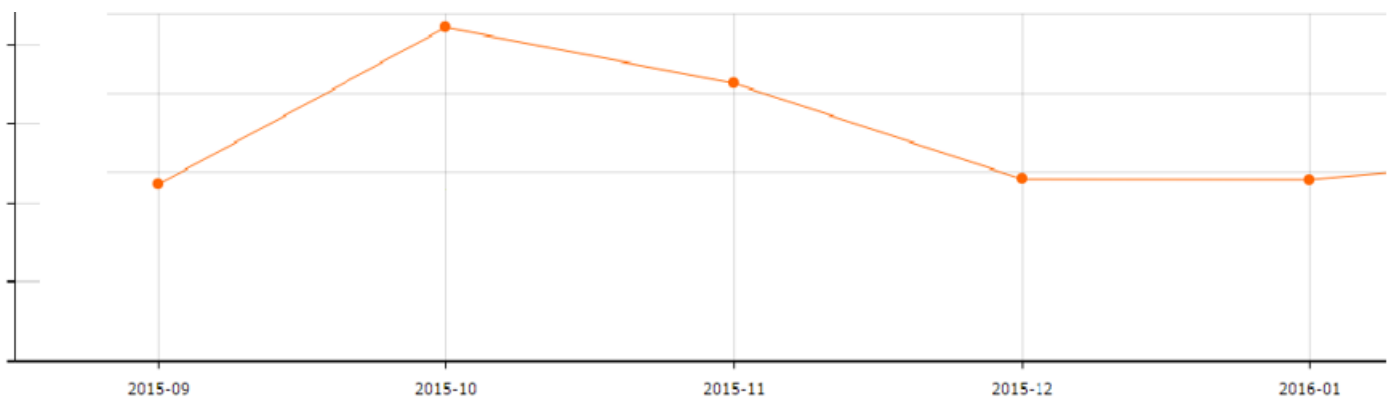**No linked invoices** — displays only the payables with no linked invoice.

There are several reports in the system enabling you to analyze the financial results of your activity for a defined period:
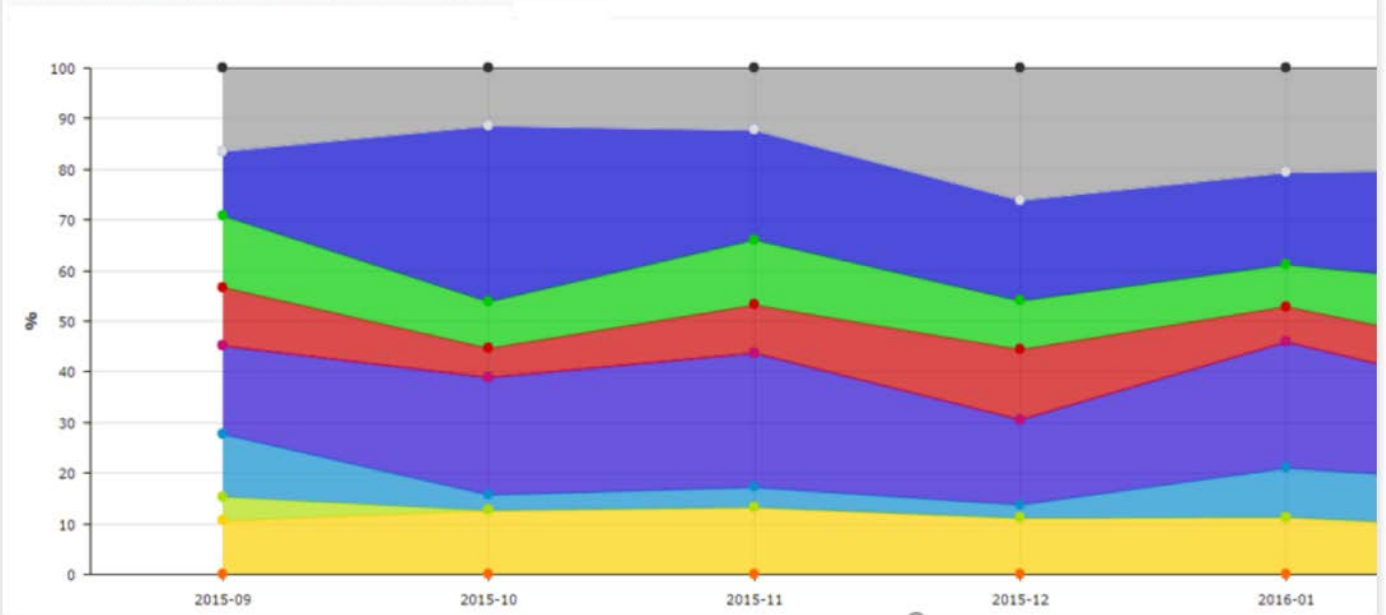

General finances: Shows income dynamic and how finances by projects, invoices and payments change over months.

Clients: Shows the report of income of specific clients by projects, invoices, payments:

INCOME AMOUNT PER CLIENT AND MONTH BY PROJECTS, EUR
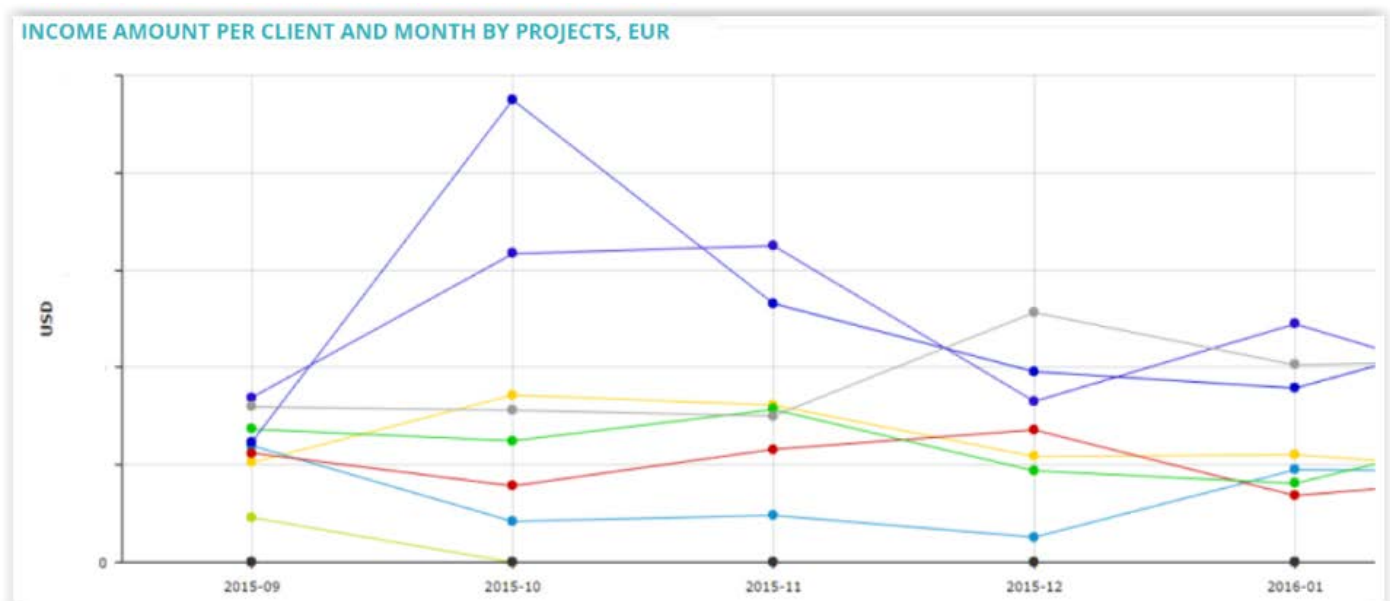
INCOME SHARE PER CLIENT AND MONTH BY PROJECTS

INCOME SHARE PER CLIENT BY PROJECTS

Additional information

The system supports all the modern browsers. However, some outdated browsers (e.g., Opera 12.17) may have issues. If you experience issues, we recommend using the modern browser.

We are improving the system all the time. That's why its user interface may change and look a little differently from the one described above. However, we try to update this manual accordingly. If you notice some discrepancies between the description and the real functionality, please tell us.