

Protemos Freelance Quick Start Guide

Contents

[Get started with Protemos](#)

[System values settings](#)

[Add clients](#)

[Add new translation project](#)

[Create invoices for clients and control their payment](#)

[Filters](#)

[Reports](#)

[Additional information](#)

Get started with Protemos

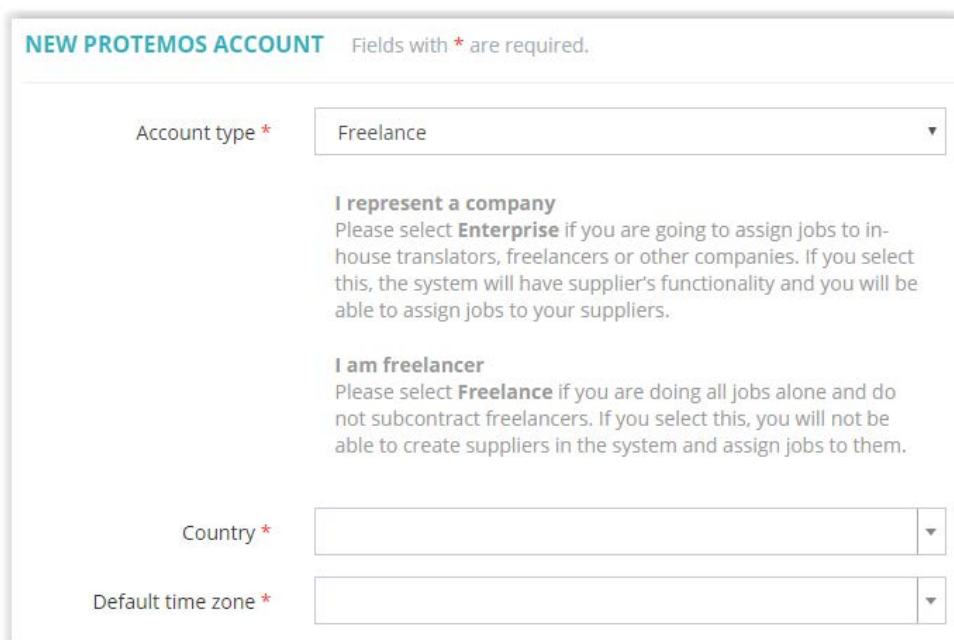


To start working with Protemos, create your account by completing the following steps:

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



2. Go to the [Create Account](#) page:



NEW PROTEMOS ACCOUNT Fields with * are required.

Account type * Freelance

I represent a company
Please select **Enterprise** if you are going to assign jobs to in-house translators, freelancers or other companies. If you select this, the system will have supplier's functionality and you will be able to assign jobs to your suppliers.

I am freelancer
Please select **Freelance** if you are doing all jobs alone and do not subcontract freelancers. If you select this, you will not be able to create suppliers in the system and assign jobs to them.

Country *

Default time zone *

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 Protomos 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.

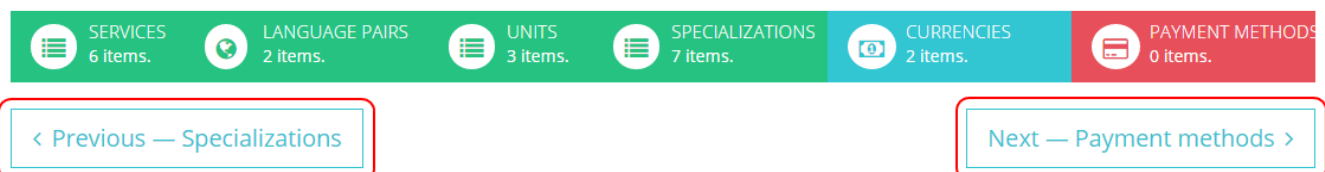
Language pairs are your language pairs.

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

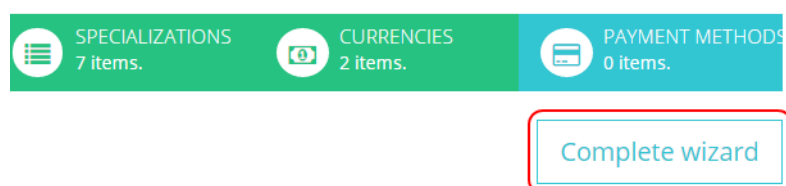
Currencies are the currencies you work with such as US dollars or euros. Indicate the main currency here. The system will use it for accounting.

Payment methods are the payment details. They will be used in the invoices the system will generate to send your clients.

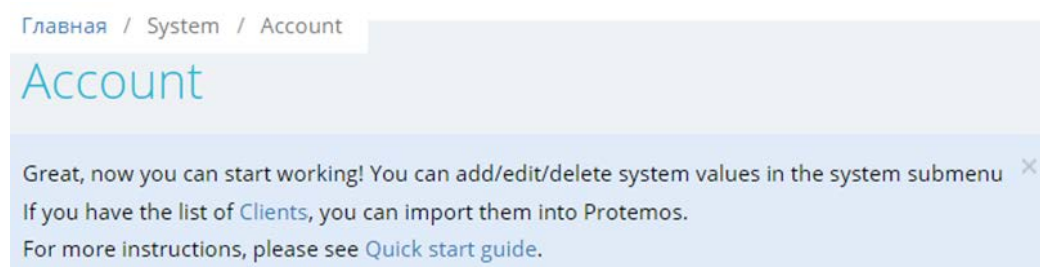
To navigate in the menu entries, use a dedicated navigation menu:



7. Having completed all the entries, press the **Complete wizard** button:



8. The following screen will be displayed:



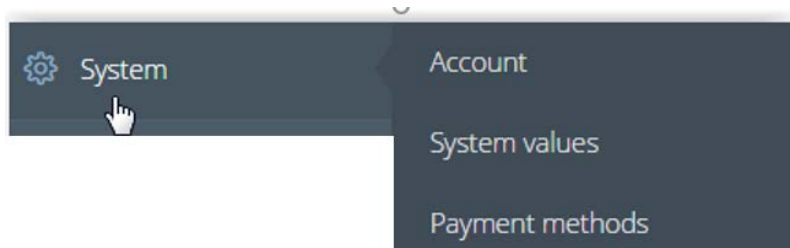
This means that your account has been created and you can start working with Protomos.

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:

Account

GENERAL INFO

Change account owner
Update

Account type	Freelance
VAT number	
Website	
Country	Germany
ZIP code	
City	
Address	
Account owner	Helen Prof
Registered	Oct 27, 2016 Helen Prof

DEFAULT SETTINGS

Change

Default time zone	(UTC +01:00) Europe/Berlin
Default currency	EUR - Euro
Default payment method	translator.helen.technolex@gmail.com

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

System=>System Values

System values contains several submenus:

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

Languages			
Language pair	Enabled	In use	
English (United States) – German	Yes	No	Update Delete
English (United States) – French (France)	Yes	No	Update Delete
English (United States) – Spanish (Spain)	Yes	No	Update Delete

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

Services			
Service	Enabled	In use	
Desktop publishing	Yes	No	Update Delete
Editing	Yes	No	Update Delete
Localization	Yes	No	Update Delete
Proofreading	Yes	No	Update Delete
Quality evaluation	Yes	No	Update Delete
Translation	Yes	No	Update Delete

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

Specializations

Specialization	Enabled	In use	
Financial	Yes	No	Update Delete
Information technology	Yes	No	Update Delete
Legal	Yes	No	Update Delete
Marketing	Yes	No	Update Delete

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

Units

Unit	Enabled	In use	
Hour	Yes	No	Update Delete
Page	Yes	No	Update Delete
Word	Yes	No	Update Delete

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.

Currencies

Currency	ISO code	Latest rate to default currency	Enabled	
Euro Default	EUR	1.000000	Yes	
United States Dollar	USD	1.089803	Yes	Set as default Disable Delete

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.

System=> Payment Methods

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 <small>Default</small>	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:

GENERAL INFO Fields with * are required.

Type *	<input type="text" value="Company"/>
Company name *	<input type="text" value="Smart Gadget"/>
VAT number	<input type="text"/>
Website	<input type="text"/>
Country *	<input type="text" value="Estonia"/>
ZIP code	<input type="text"/>
City	<input type="text"/>
Address	<input type="text"/>

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

Client – Smart Gadget

General info
Primary user
Contact persons
Prices
Documents

Type	Company
VAT number	
Country	Estonia
ZIP code	
City	
Address	
Website	
Status	Active

Update
Delete

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

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

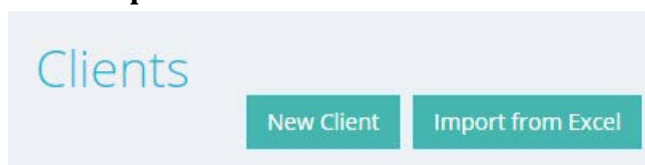
If the client has several contact persons, they can be entered in **Contact persons** tab.

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.

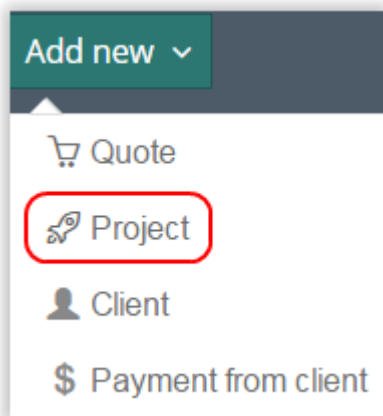
Add new translation project



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:

New project

Fields with * are required.

Project name *	Corporate web site
Description	Corporate web site translation for Smart Gadget 20,000 words
Language pairs	English (United States) – French (France) ×
Specialization *	Marketing × ▾
Client *	Smart Gadget × ▾
Start *	2016-10-27 20:54 
Deadline	2016-11-10 15:00 
<input type="checkbox"/> Free of charge Free of charge project cannot have any receivables.	

Create

Cancel

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

Project P13731 Corporate web site

Details Files Finances

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

Details Files Finances

PROJECT INPUT FILES Tip: you can drag and drop files here. Add input files Download all as ZIP

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.

Details
Files
Finances

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	<input type="text"/>
Language pair *	English (United States) – French (... x ▼)
Service *	Translation x ▼
Unit amount *	20000
Unit type *	Word x ▼
Price per unit *	0.2
Currency *	EUR - Euro x ▼
Note	<input type="text"/>

☐ 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.

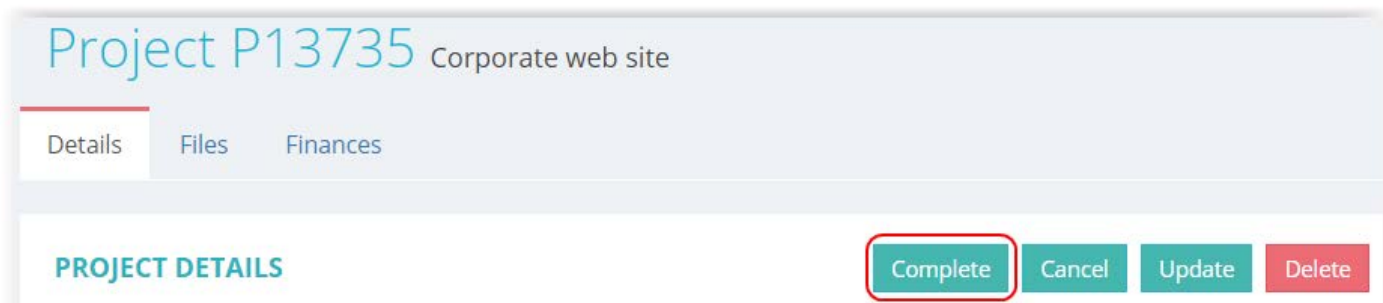
You can enter several receivables for a project.

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



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



- 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](#)

<input type="checkbox"/>	Code	PO number	Invoice	Client	Project	Project status	Project deadline	Service	Language pair	Unit	Price per unit	Total	Currency
<input checked="" type="checkbox"/>	PR17088			Smart Gadget	Corporate website	Active	2016-11-10 15:00 <i>due через 13 дней</i>	Translation	English (United States) – French (France)	20000 Word	0.2	4000	EUR
Total by currency												4000	EUR
Grand total in default currency												4000	EUR

Receivables with the same **Client** and **Currency** will be linked to one **Invoice**.

- 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 <i>Helen Prof</i>
Due date	2016-11-26 <i>due через 30 дней</i>
Notes to client	

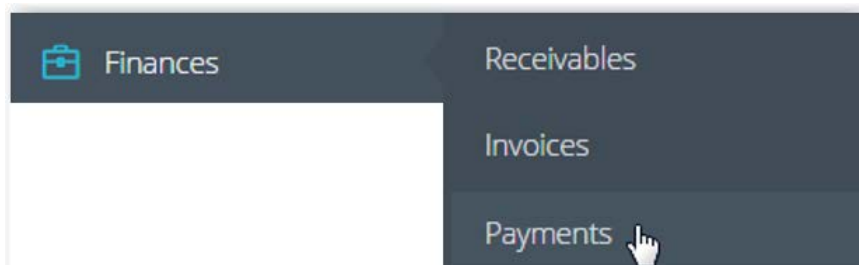
4. You can do the following:
- Edit the invoice using the **Update** button
 - Download the invoice as PDF file by pressing the **Download as PDF** button
 - Send the invoice to the client directly from the system by pressing the **Send to client** button

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:



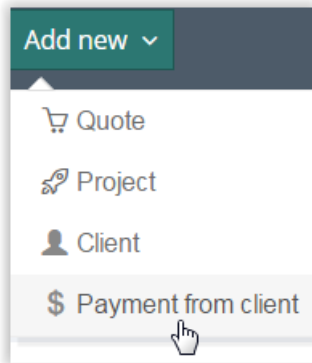
2. Press the **New payment** button:

Client payments

New payment

No filter applied ^

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

<input type="checkbox"/>	Invoice	Linked payments	Coverage by payments	Total	Paid amount	Amount due	Currency	Created
<input checked="" type="checkbox"/>	Ci2016-1302		Not covered	4000	0	4000	EUR	2016-10-27

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
Total by currency							4000	4000	0	EUR
Grand total in default currency							4000	4000	0	EUR

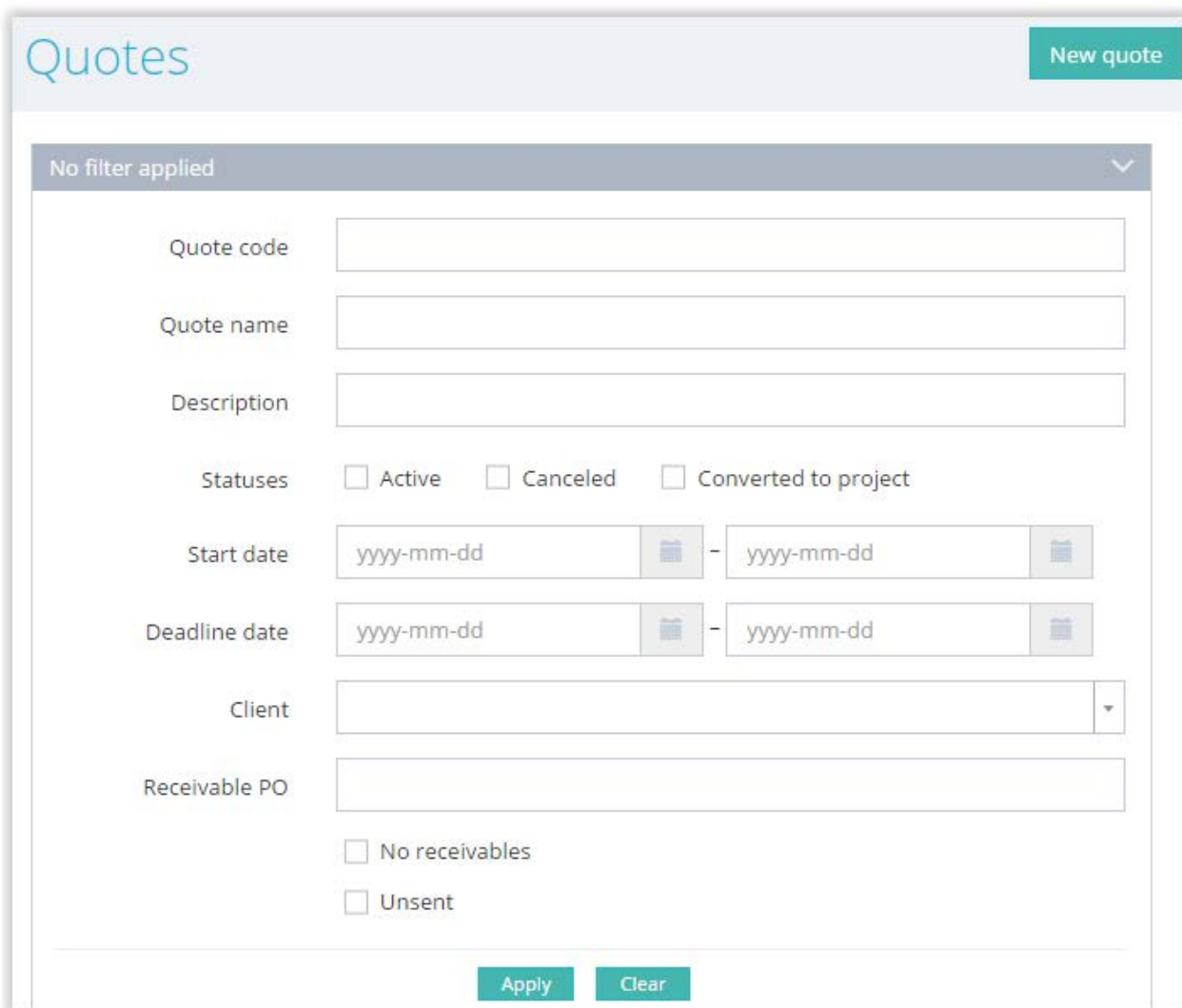
Click the payment and receive more details



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



The screenshot shows the 'Quotes' filter interface. At the top left is the word 'Quotes' in a light blue font. At the top right is a green button labeled 'New quote'. Below this is a grey bar with the text 'No filter applied' and a downward arrow. The main area contains several filter fields: 'Quote code' (text input), 'Quote name' (text input), 'Description' (text input), 'Statuses' (checkboxes for 'Active', 'Canceled', and 'Converted to project'), 'Start date' (date range input with 'yyyy-mm-dd' format and calendar icons), 'Deadline date' (date range input with 'yyyy-mm-dd' format and calendar icons), 'Client' (dropdown menu), 'Receivable PO' (text input), and two checkboxes at the bottom: 'No receivables' and 'Unsent'. At the bottom of the form are two green buttons: 'Apply' and 'Clear'.

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.

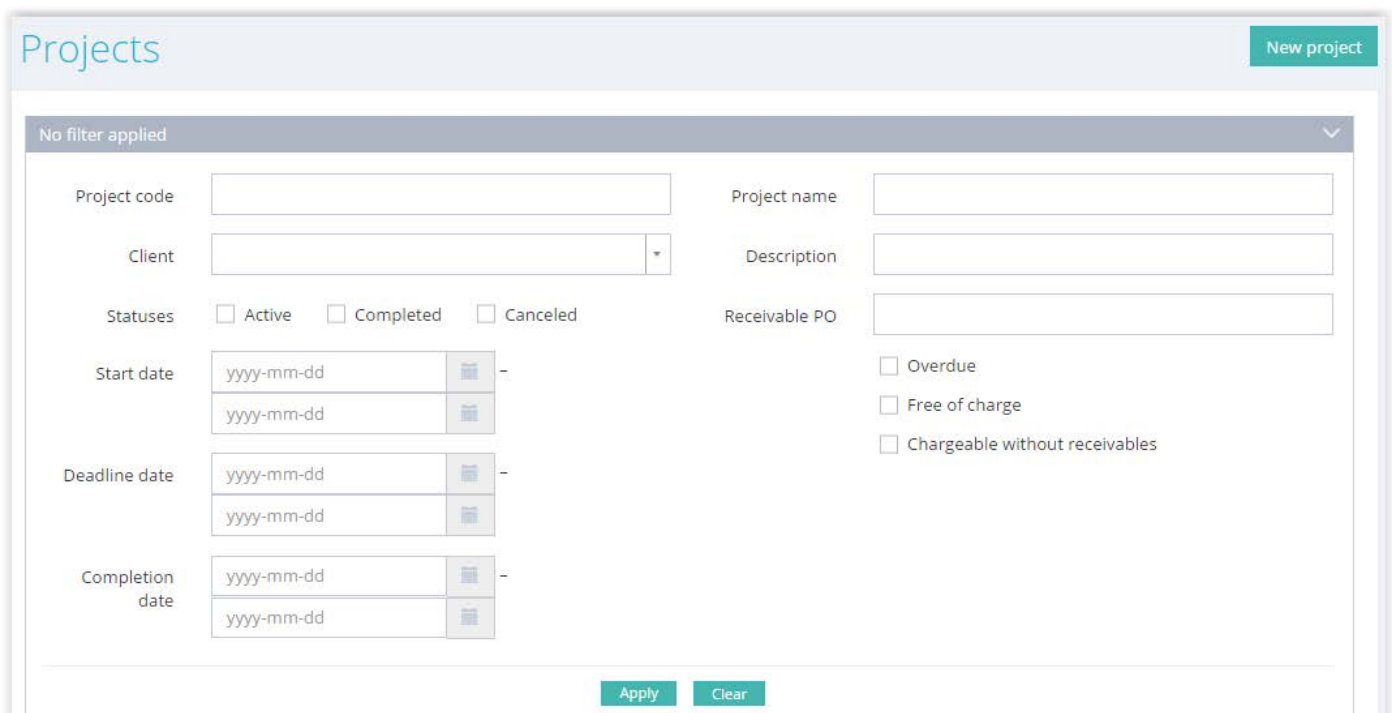
Start date — displays only the quotes which were started in specified period.

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



The screenshot shows the 'Projects' filter interface. At the top left is the title 'Projects' and at the top right is a 'New project' button. Below the title is a dropdown menu showing 'No filter applied'. The filter area contains several input fields and checkboxes:

- Project code**: A text input field.
- Client**: A dropdown menu.
- Statuses**: Three checkboxes labeled 'Active', 'Completed', and 'Canceled'.
- Start date**: Two date pickers with the format 'yyyy-mm-dd'.
- Deadline date**: Two date pickers with the format 'yyyy-mm-dd'.
- Completion date**: Two date pickers with the format 'yyyy-mm-dd'.
- Project name**: A text input field.
- Description**: A text input field.
- Receivable PO**: A text input field.
- Overdue**: A checkbox.
- Free of charge**: A checkbox.
- Chargeable without receivables**: A checkbox.

At the bottom of the filter area are two buttons: 'Apply' and 'Clear'.

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

Client receivables and creation of invoices

No filter applied

Receivable code	<input type="text"/>	Project name	<input type="text"/>
Client	<input type="text"/>	Project statuses	<input type="checkbox"/> Active <input type="checkbox"/> Completed <input type="checkbox"/> Canceled
PO number	<input type="text"/>	Project deadline date	<input type="text" value="yyyy-mm-dd"/> - <input type="text" value="yyyy-mm-dd"/>
<input type="checkbox"/> No invoice <input type="checkbox"/> No PO number			

Apply Clear

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

Client invoices
New invoice

No filter applied

Code

Creation date

yyyy-mm-dd

-

yyyy-mm-dd

Due date

yyyy-mm-dd

-

yyyy-mm-dd

Client

☐ Not sent

☐ No linked payments

☐ Not fully covered

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.

Filter of client payments

Client payments
New payment

No filter applied

Code

Creation date

yyyy-mm-dd

-

yyyy-mm-dd

Paid at date

yyyy-mm-dd

-

yyyy-mm-dd

Client

☐ No linked invoices
☐ Not fully covered

Apply

Clear

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.

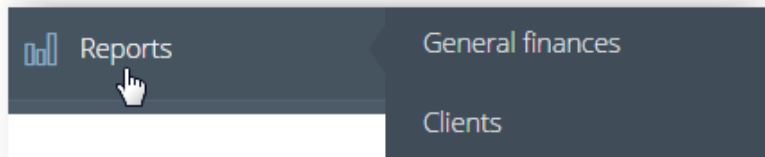
Vendor — displays only the payables for the selected vendor.

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

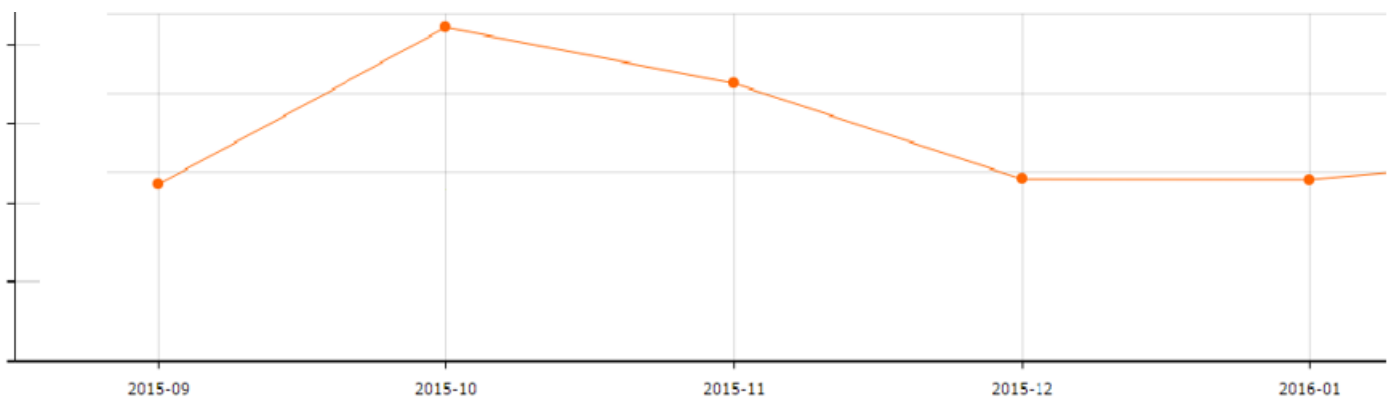
Reports



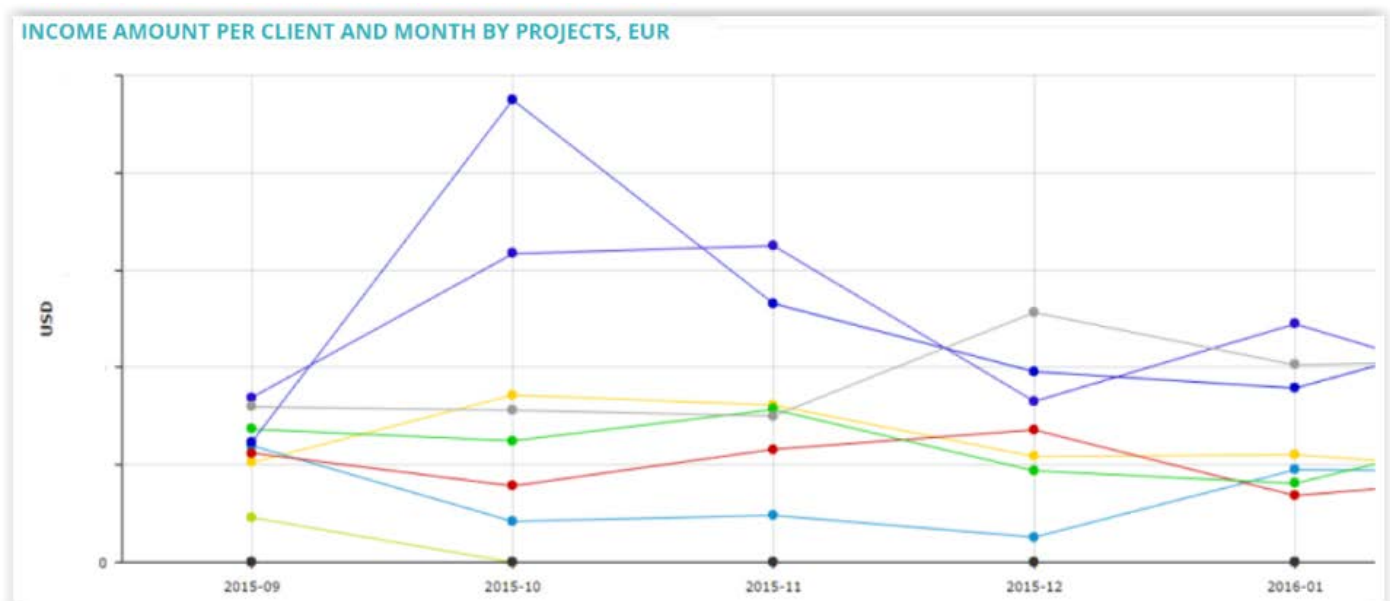
There are several reports in the system enabling you to analyze the financial results of your activity for a defined period:



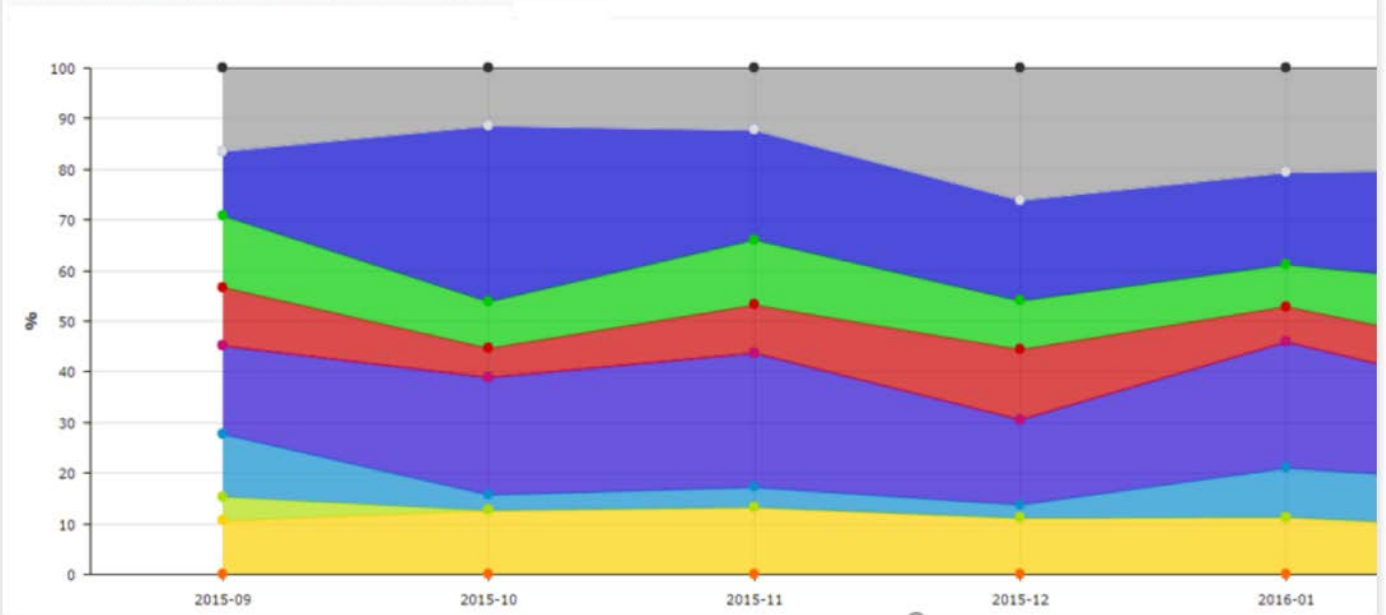
General finances: Shows income dynamic and how finances by projects, invoices and payments change over months.



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



INCOME 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.