

Protemos Quick Start Guide

Contents

[Get started with Protemos](#)

[System values settings](#)

[Add clients](#)

[Add vendors](#)

[Add new translation project](#)

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

[Invoices from vendors and payment control](#)

[Filters](#)

[Reports](#)

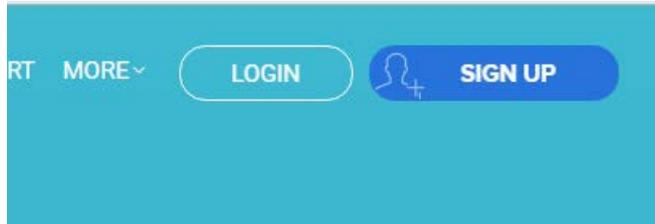
[Additional information](#)

Get started with Protemos



To start working with Protemos, create your account in the system 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.

Fields with * are required.

Account type *

Enterprise

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.

Company name *

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.

Individual: 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:

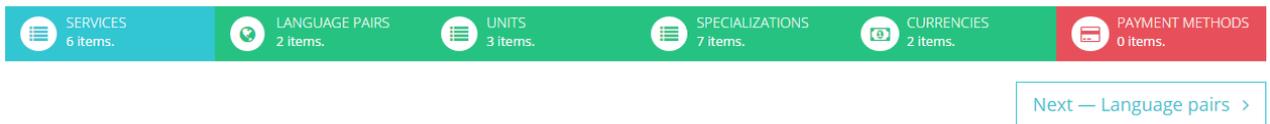
Welcome!

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 the **OK, let's get started!** button. The system setup wizard will be displayed:



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.

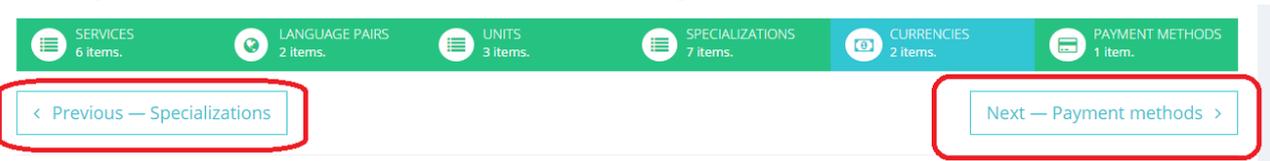
Language pairs are your language pairs.

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

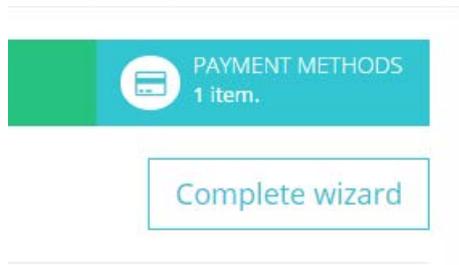
Currencies are the currencies you work with such as US dollars or euros. Indicate the main currency of the system here. The system will use it for accounting.

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

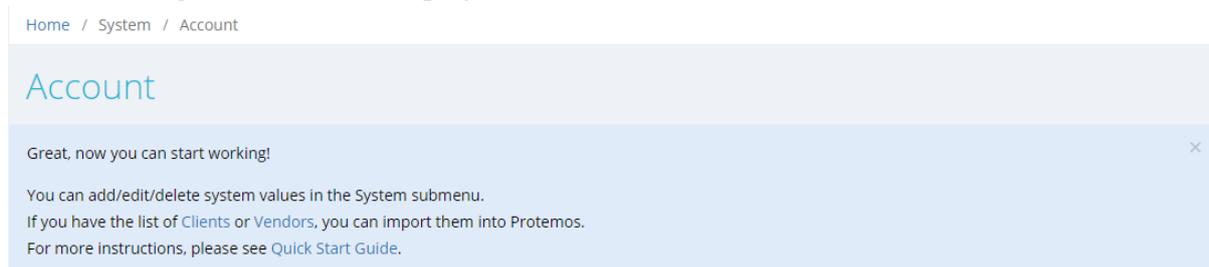
To navigate in the menu entries, use a dedicated navigation menu:



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



8. The following screen will be displayed:

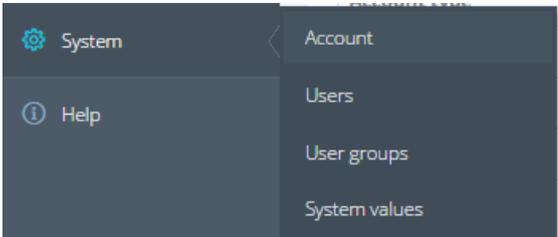


This means that your account has been created and you can start working with Protemos. However, before you start working with the projects in the system, you need to add your clients in it. For Enterprise version, you need also to add vendors. These areas will be addressed in the following sections.

System values settings



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



Each of these menu screens is described below.

System =>Account

Account

General info

Company name	Protemos Inc.
Account owner	Volodymyr Kukhareiko
Account type	Company
Country	Ukraine
Time zone	(UTC +02:00) Europe/Kiev
Registered	Sep 23, 2015 by Volodymyr Kukhareiko

[Update details](#)

Default account settings

Currency	USD - United States Dollar
Payment method	net 30
Payment condition	30

[Change settings](#)

Press the **Update details** button to update the default account settings:

Update Account Details

Account

Account type

Company Name

Country

Time zone

Press the **Change settings** button to select the default payment method and define in how many days the

client should pay your invoices:

Update Account Settings

You can change default currency on Currencies page.

Default setting

Payment method:

Payment condition: days

Note: Payment methods are entered in the special menu screen described below.

System=>User

Use this menu screen to add new users who will use the system just as you do. For example, if there are several project managers in your team, you can add a separate account for each of them.

To add a new user, press the **Add new user** button and fill in the boxes:

Add New User

User group:

First name:

Last name:

Email:

User will receive the system invite with link to secure page to specify username and password to complete registration.

After pressing the **Save** button, you will be sent an invitation email and will be able to complete your account creation.

Note: Use the User Group box to select the group to relate your users to. This will define the user's access rights.

System=>User Groups

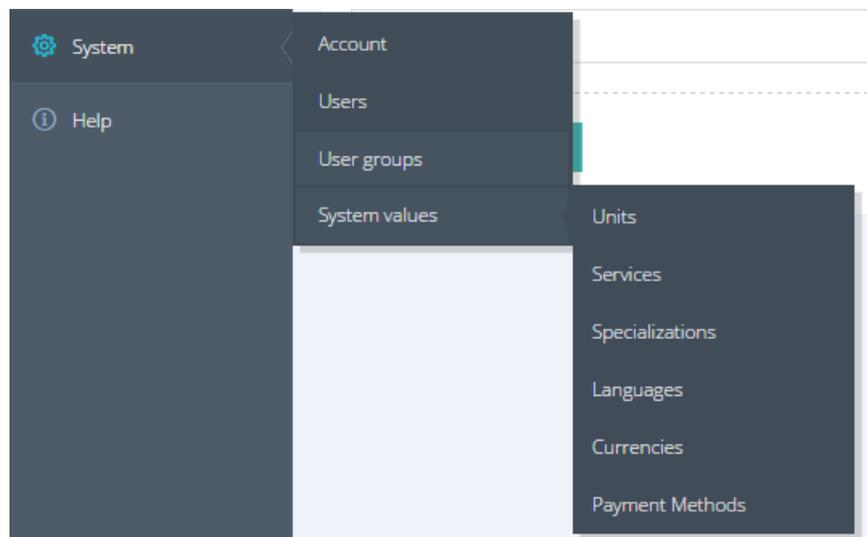
Use this menu screen to define access rights for various user groups.

User Groups

Group name	Project	Client	Vendor	Finance	Report	System	
Administrator	<input checked="" type="checkbox"/>						
Project manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>					
Accountant	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
HR manager	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

System=>System Values

This menu screen contains several submenus:



Each of them is described below.

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

Units		
Unit	Active	
Hour	Yes	Update Delete
Page	Yes	Update Delete
Word	Yes	Update Delete

[Add new Unit](#)

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

Services		
Service	Active	
Desktop Publishing	Yes	Update Delete
Editing	Yes	Update Delete
Localization	Yes	Update Delete
Proofreading	Yes	Update Delete
Quality evaluation	Yes	Update Delete
Translation	Yes	Update Delete

[Add new Service](#)

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

Specializations

Specialization	Active	
Financial	Yes	Update Delete
IT	Yes	Update Delete
Legal	Yes	Update Delete
Marketing	Yes	Update Delete
Medical	Yes	Update Delete
Other	Yes	Update Delete
Tourism and travel	Yes	Update Delete

[Add new Specialization](#)

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

Languages

Language pair	Active	
English - Spanish, Castilian	Yes	✎ 🗑️
English - French	Yes	✎ 🗑️

[Add new language pair](#)

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

Name	ISO code	Default	Enabled	Latest Rate	
Euro	EUR		Yes	0.899564	Disable Make default Delete
United States Dollar	USD	Yes	Yes	1	

[Add new currency](#)

[Exchange rates history](#)

To set any currency as default, press the **Make 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

Name	Description	Payment type	Enabled	
me@protemos.com	default	PayPal	Yes	 

Add new method

Change default method

You can enter many payment methods: Skrill, Paypal, wire transfer, etc.

Press the **Change default method** button to select the default payment method.

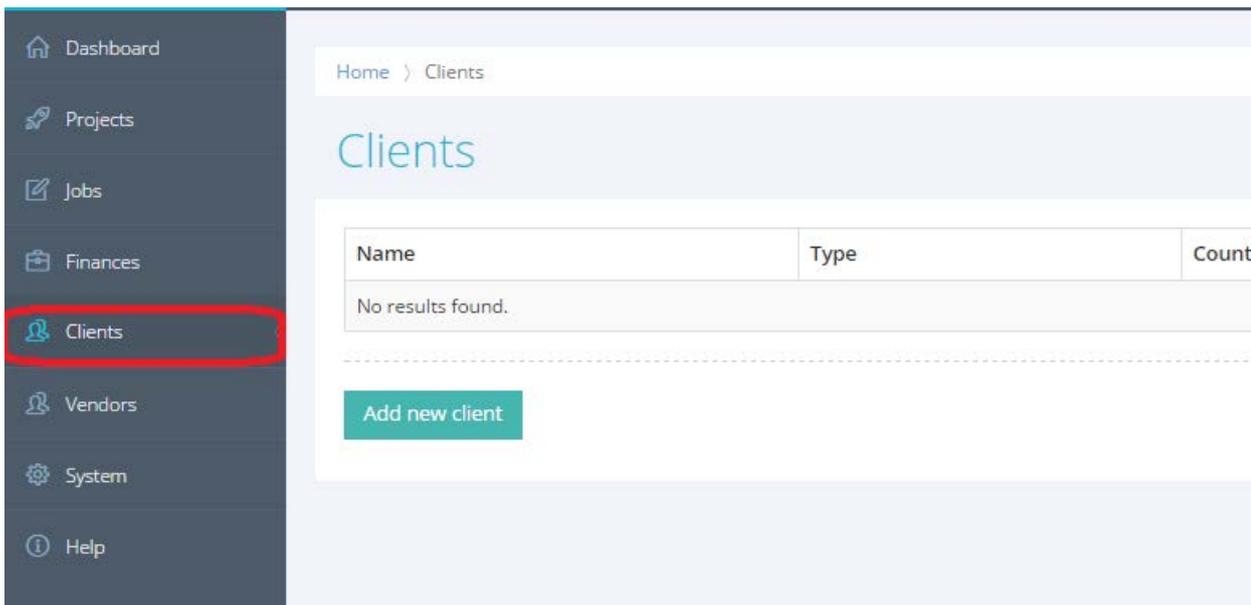
Add clients



You can add clients manually, one by one, or import their list from an Excel file. Each of these options is described below.

Adding clients manually

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

Vendor details

Type	<input type="text" value="Company"/>
Company name	<input type="text" value="Acme Corporation"/>
Company size	<input type="text" value="Large"/>
Phone	<input type="text" value="55555555"/>
Website	<input type="text" value="AcmeCorporation.com"/>
Country	<input type="text" value="United States"/>
Address	<input type="text" value="Somewhere"/>
VAT number	<input type="text" value="12345678"/>

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

User account

First name	<input type="text" value="John"/>
Last name	<input type="text" value="Doe"/>
Email	<input type="text" value="John.Doe@acme.com"/>

System will use email for notifications. User with Client type can not login to system.

Use the **Payment** section to enter the invoice payment deadline and to select the currency for the client to pay in:

Payment

Payment condition	<input type="text" value="30"/> <input type="text" value="days"/>
Default currency	<input type="text" value="USD - United States Dollar"/>
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

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

Client – Acme Corporation

General info Contact persons Prices

General info

Company name	Acme Corporation
Vendor type	Company
Company size	1
Website	http://acmecorporation.com
Country	United States
Address	Somewhere
Phone	☎ 555555555
VAT number	12345678
Default Currency	USD - United States Dollar
Status	Active

Press the **Update details** button to update the information.

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

Client – Acme Corporation

General info Contact persons Prices

Contact persons

Name	Email	Phone	Position	Notes	Status	
Rebecca Simons	Rebecca.Simons@acme.com	+5555555555	Project Manager		Active	 
Patrick Johnson	Patrick.Johnson@Acme.com	+4444444444	Director		Active	 

Add new contact person

Use the **Prices** tab to enter the prices agreed with the client:

Client – Acme Corporation

General info Contact persons Prices

Prices

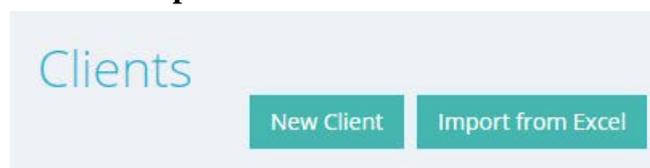
Language pair	Service	Specialization	Unit	Unit price	Currency	
English – Spanish, Castilian	Proofreading	Legal	Hour	50	USD	 
English – French	Translation	IT	Word	0.15	USD	 

Add new price

Import clients from file

If you already have the list of clients, contacts and prices, you can easily import it without the need to enter such information manually.

1. Go to the [client list](#)
2. Press the **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.

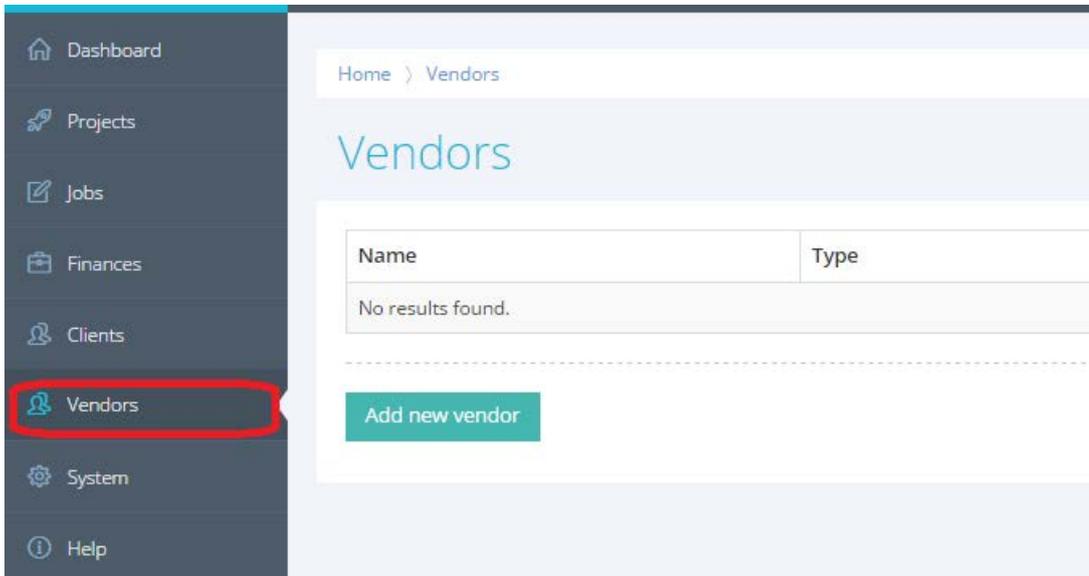
The clients' information is imported step-by-step. Use the **ClientImport.xlsx** template to enter general information about clients, the **ClientContactImport.xlsx** to enter the contact information of employees and the **ClientPriceImport.xlsx** to import prices for clients.

Add vendors



If you assign jobs to other vendors, you need to add each of them in the system.

To do so, press the **Vendors** button on the side panel and select **Add new vendor**:



The screen to add a vendor will appear.

First, you will see the **Type** box. You can select any of the three vendor types:

Freelancer is a non-staff employee

Company is a contractor company

In-house is a staff employee who works in your office.

Depending on the vendor type, you will see the boxes to fill in.

Press the **Save** button to add a vendor account in the system. The vendor will be sent an invitation email and needs to accept the invitation. For additional information please see the [Guide for Vendors](#).

Use the **Prices** tab to enter the prices agreed with the vendor:

Vendor – Mizernyi Yaroslav

General info Login details Prices Payment methods

Prices

Language pair	Service	Specialization
No results found.		

Add new price

Select the vendor payment method in the **Payment methods** tab:

General info Login details Prices Payment methods

Payment methods

Name	Description	Payment type
Cash	Cash	Other

Add new method

Set default payment method

To set one of the entered payment methods as default, press the **Set default payment method** button. This payment method will be used in invoices by default.

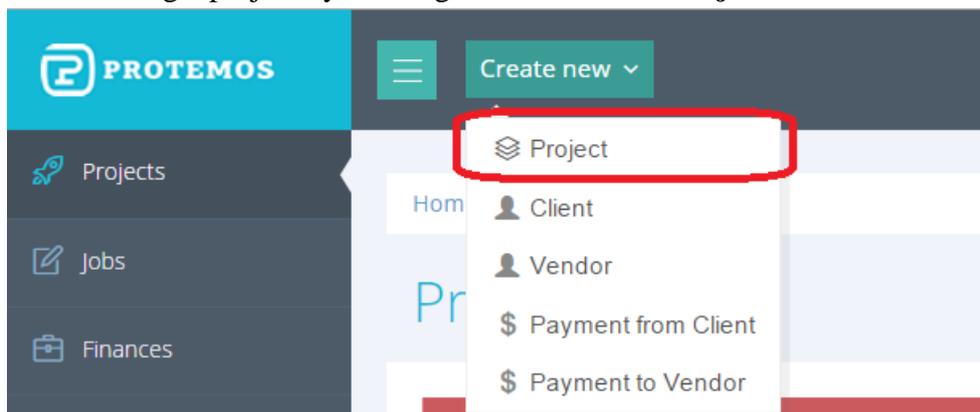
Add new translation project



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

For illustration purposes, suppose you have Acme Corporation 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 **Create new => Project**:



2. Enter your project information:

Create New Project

Name	<input type="text" value="Corporate web site"/>
Description	<input type="text" value="Corporate web site translaton for Acme"/>
Specialization	<input type="text" value="Marketing"/>
Client	<input type="text" value="Acme Corporation"/>
Contact person	<input type="text" value="Patrick Johnson"/>
Project manager	<input type="text" value="Volodymyr Kukhareenko"/>
Free of charge	<input type="checkbox"/> NO Free of charge Project cannot have any Receivables
Status	<input type="text" value="Active"/>
Start	<input type="text" value="23 Sep 2015 - 12:53"/> <input type="button" value="x"/> <input type="button" value="🕒"/>
Deadline	<input type="text" value="07 Oct 2015 - 12:00"/> <input type="button" value="x"/> <input type="button" value="🕒"/>
	<input type="button" value="Create"/> <input type="button" value="Cancel"/>

3. Press the **Create** button.
4. The project page will be displayed with the following tabs:

Home > Projects > Project P1604

Project P1604 Corporate web site

General Jobs Files Finances Events

PROJECT DETAILS

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

Files Management – Project P1604 Corporate web site

General Jobs Files Finances Events

PROJECT INPUT

Add project input files Download all as ZIP

File #	Filename	Size	Uploaded
No results found.			

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

Finances – Project P1604 Corporate web site

General Jobs Files Finances Events

RECEIVABLES FROM CLIENTS

Make project free of charge Add new receivable

#	PO number	Invoice	Service	Language pair	Unit	Unit amount	Price per unit	Total	Currency
No results found.									
Total calculated in default currency								0.00	USD

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

Add New Receivable

RECEIVABLE

Project	P1604 - Corporate web site
Project specialization	Marketing
Client	Acme Corporation
Receivable total	3 000 USD

PO number

Language pair

Service

Unit amount

Unit type

Price per unit

Currency

Add price for this client

Create

Cancel

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.

Check the “Add price for this client” option to 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.

- If you fulfill your job yourself, the new project has been created. You have to fulfill and complete it (see item 23 in this list). If you need to assign the project to other vendors, carry on reading below.
- Let’s assume that you need to assign the translation to one vendor and then give it for proofreading to another vendor. Create their respective jobs in the system. Go to the **Jobs** tab:

Project P1604 – Jobs Corporate web site

General **Jobs** Files Finances Events

PROJECT JOBS

Add new Job

Job	Job name	Service	Language pair	Project manager	Vendor	Started	Deadline	Completed	Payables, USD	Status
No results found.										

11. Press the **Add new job** button.

12. In the **JOB INPUT FILES** section select the project files to send to the translator.

JOB INPUT FILES

Add from Project input files

<input type="checkbox"/>	File #	Filename	Size
<input checked="" type="checkbox"/>	2182	8_12-25_7.pdf	346.90 KB

Add from other Jobs output files

<input type="checkbox"/>	Job	Job service	File #	File
No files found.				

13. In the **JOB DETAILS** section select the vendor and enter information about the job:

JOB DETAILS

Job name: Corporate web site

Free of charge: NO Free of charge Job cannot have any Payables

Service: Translation

Vendor: Mizernyi Yaroslav

Language pair: English – French

Deadline: 30 Sep 2015 - 13:00

Notes to vendor:

Save Cancel

14. Next, the job screen will be displayed:

Home > Projects > Project P1604 > Jobs > Job J2046

Job J2046 Corporate web site

DETAILS

Status	Draft
Project	P1604 - Corporate web site
Client	Acme Corporation
Vendor	Mizernyi Yaroslav
Service	Translation
Language pair	English - French
Deadline	30 Sep 2015 - 13:00 <i>due in 6 days</i>
Created	23 Sep 2015 - 13:25 by Volodymyr Kukharenko
Project manager	Volodymyr Kukharenko

ACTIONS

WORKFLOW

- Start Job
- Send message to Vendor

ADDITIONAL

- Update Job
- Cancel
- Delete

PAYABLES

[Add new payable](#)

15. Enter the job volume and payable for the vendor by pressing the **Add new payable** button:

Add New Payable

RECEIVABLE

Project	P1604 – Corporate web site
Project specialization	Marketing
Client	Acme Corporation
Vendor	Mizernyi Yaroslav
Job	J2046 – Corporate web site
Job service	Translation
Language pair	English – French
Payable total	1 400 EUR

Unit amount

Unit type

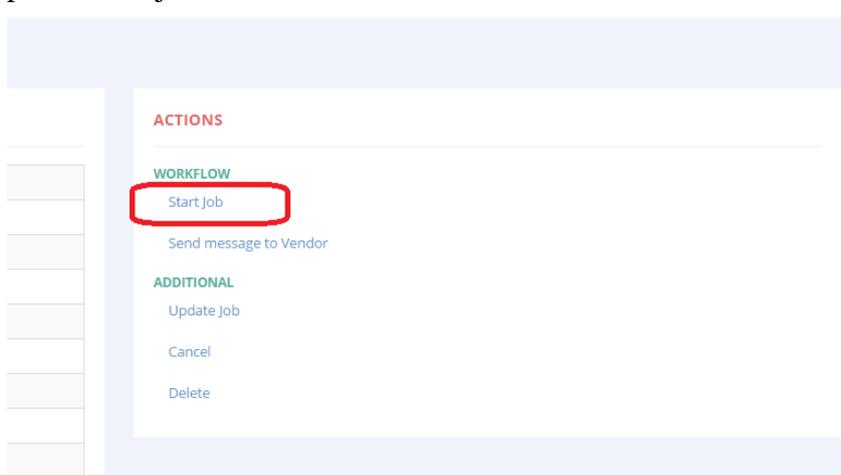
Price per unit

Currency

Add price for this vendor

[Create](#) [Cancel](#)

16. Now you can send the notification to the vendor to start the job. Press the **Start Job** button in the left pane of the job screen:



17. The vendor will receive the notification by email that he has been assigned a job, log in and collect the files. Then the vendor will fulfill the job, upload the ready files to the system and mark the job as completed. You will be notified by email that the vendor has completed the job.
18. Check if the files delivered by the translator are correct by downloading them from the **JOB**

OUTPUT FILES section:

JOB OUTPUT FILES Add output files Download all as ZIP

File #	Filename	Size	Uploaded at	Uploader	Is project output	
2183	translator.zip	37.66 KB	23 Sep 2015 - 13:34	Volodymyr Kukhareenko	No	

19. Having ensured that the vendor did everything correctly, press the **Accept Job** button.

ACTIONS

Your action is needed. Please check output files then accept or reject this Job.

WORKFLOW

- Accept Job**
- Reject job
- Send message to Vendor

ADDITIONAL

- Move to Draft
- Update Job

20. The vendor will be notified by email that the job has been accepted.

21. Now you would like to pass the completed translation for proofreading to another vendor. Add a job for another vendor. The process is the same. The only difference is that you need to specify the files delivered by the translator when selecting incoming files for the editor:

Add New Job Project P1604 – Corporate web site

JOB INPUT FILES

Add from Project input files

<input type="checkbox"/>	File #	Filename	Size	Uploader	Uploaded at
<input type="checkbox"/>	2182	8_12-25_7.pdf	346.90 KB	Volodymyr Kukhareenko	23 Sep 2015 - 13:19

Add from other Jobs output files

<input type="checkbox"/>	Job	Job service	File #	Filename	Size	Uploader	Uploaded at
<input checked="" type="checkbox"/>	2046	Translation	2183	translator.zip	37.66 KB	Volodymyr Kukhareenko	23 Sep 2015 - 13:34

22. When all the vendors have uploaded their files, you can start delivering the project.

23. You can send the files to the client without logging out of the system. Go to the project’s **Files** tab and scroll down to the **PROJECT OUTPUT** section:

PROJECT OUTPUT Download all as ZIP

<input type="checkbox"/>	File #	Filename	Job	Job service	Language pair	Vendor	Size	Uploaded
No results found.								

Add additional files

24. To upload the files ready for delivery, press the **Add project output** button. To add the files

received from the vendors, press the **Add selected to project output** button:

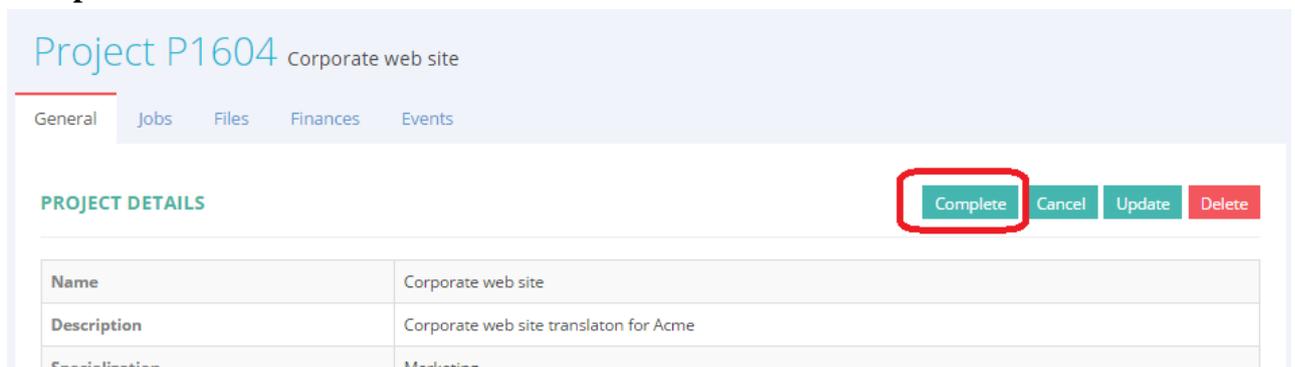
JOBS OUTPUT

Add selected to project output

Download all as ZIP

<input type="checkbox"/>	File #	Filename	Job	Job service	Language pair	Vendor	Size	Uploaded
<input checked="" type="checkbox"/>	2183	translator.zip	J2046	Translation	English - French	Mizernyi Yaroslav	37.66 KB	23 Sep 2015 - 13:34 by Volodymyr Kukhareenko

25. Having added all the needed files to **PROJECT OUTPUT**, press the **Send all files to client** button. The client’s manager will receive those files by email.
26. Having delivered all the files, you can complete the project. Go to the **General** tab and press the **Complete** button:



Project P1604 Corporate web site

General Jobs Files Finances Events

PROJECT DETAILS

Complete Cancel Update Delete

Name	Corporate web site
Description	Corporate web site translaton for Acme
Specialization	Marketing

27. Congratulations! You have completed the project.

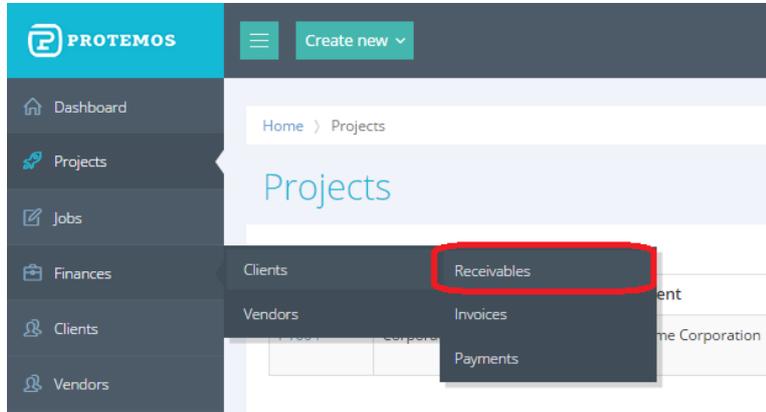
Note 1. The number of projects in your system will be increasing with time so you won’t want all of them to be displayed. Set up how projects are displayed in the list using [filters](#).

Note 2. View the list of vendors’ jobs in all the projects at the dedicated page by pressing the **Jobs** button on the side panel.

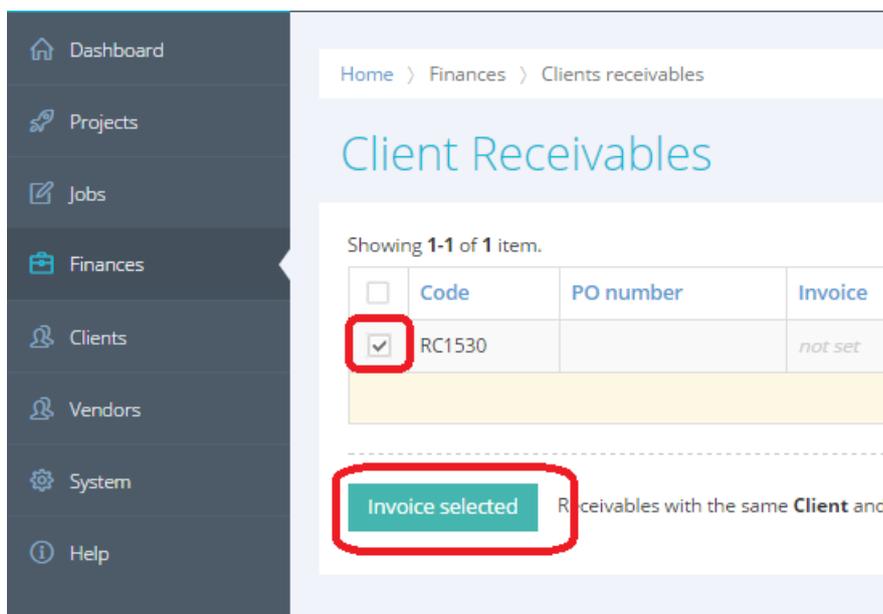
Create invoices for clients and control their payment



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



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



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

Client Invoice CI10

Invoice has been successfully created.

Invoice details

Invoice	CI10
Client	Acme Corporation
Payment method	me@protemos.com
Currency	USD - United States Dollar
Total amount	3,000.00 USD
Paid	0.00 USD
Unpaid	3,000.00 USD
Status	New
Due date	Oct 23, 2015 <i>in 29 days</i>
Created	Sep 23, 2015 by Volodymyr Kukharenko
Payments	<i>no linked payments</i>
Notes for Client	<i>empty</i>

Update details

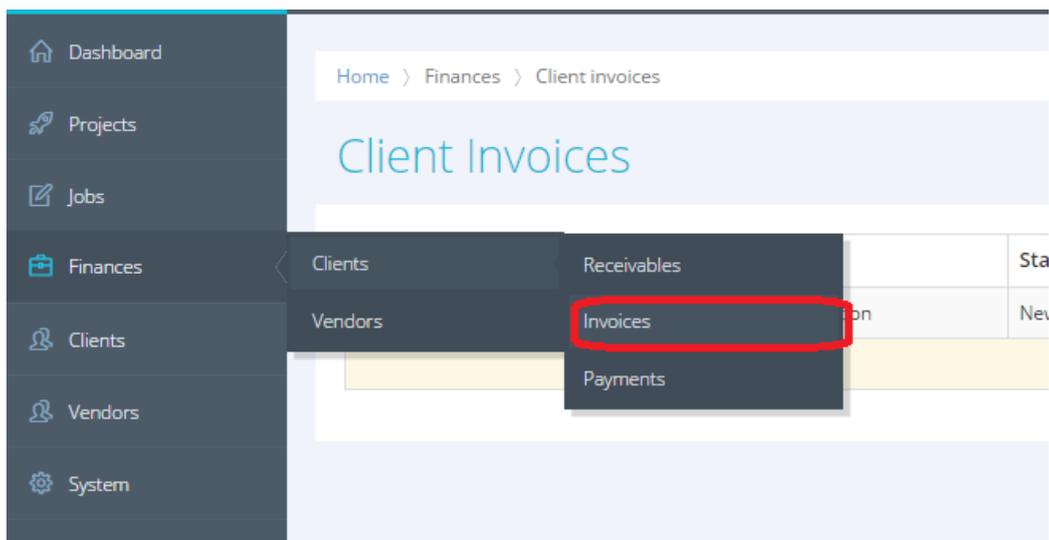
Download as PDF

Send to client

Delete

- You can do the following:
 - Edit the invoice using the **Update details** 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

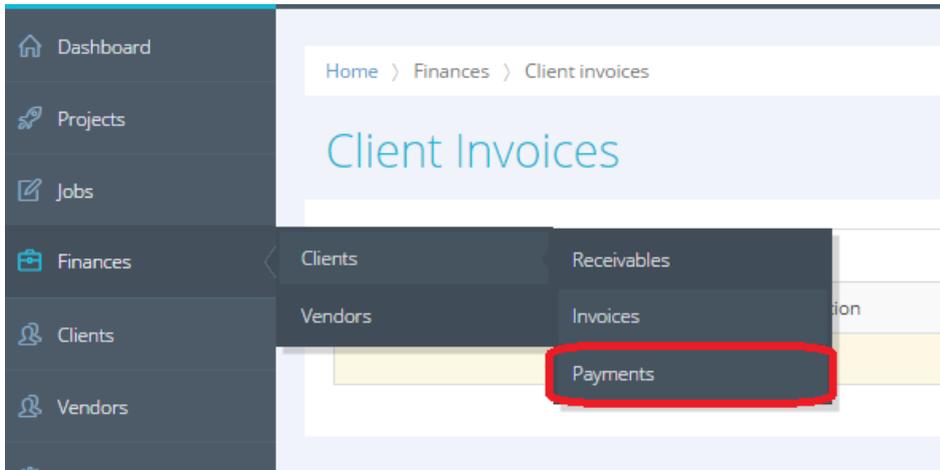
View the list of all the invoices in **Finances=>Clients=>Invoices:**



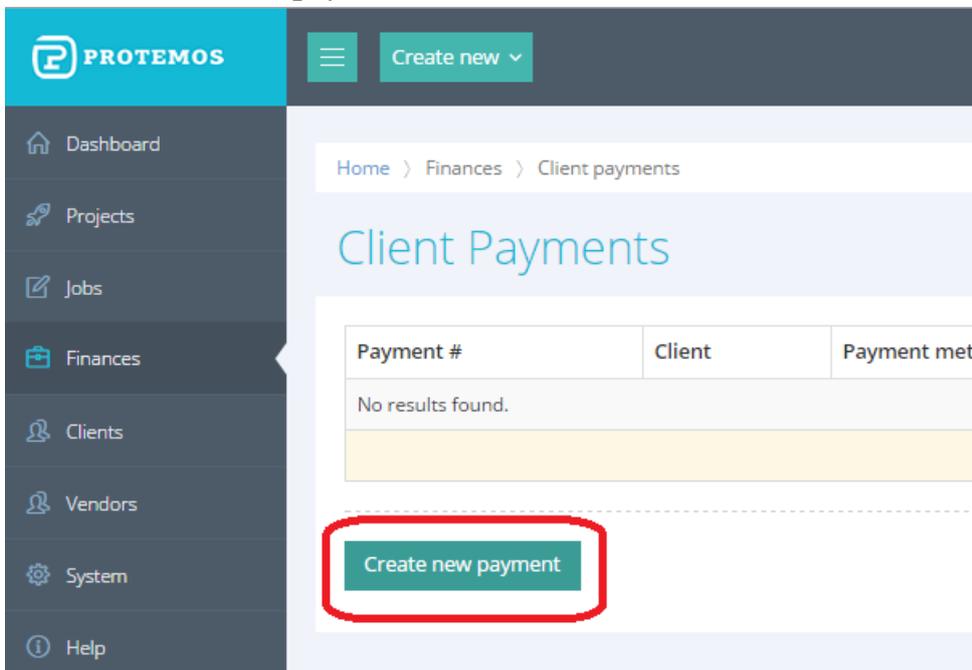
This way you can track all the invoices from your clients and control their payment.

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:

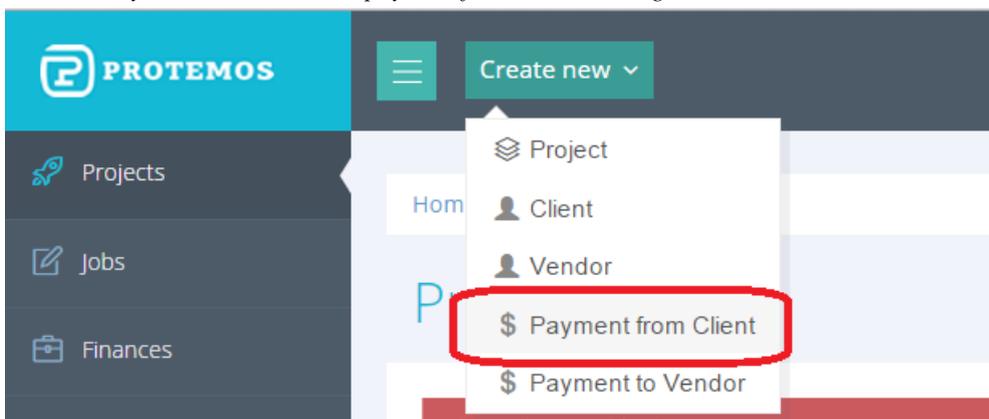
1. Go to the **Finances=>Clients=>Payments** menu:



2. Press the **Create 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.

Add New Client Payment

Payment details

Clients having uncovered invoices:

Payment method:

Currency:

Amount: USD

Paid at:

Payment note:

Uncovered invoices

<input type="checkbox"/>	Invoice	Client	Total	Amount paid	Amount due	Currency	Status	Created	Payments
<input checked="" type="checkbox"/>	CI11	Acme Corporation	3,000.00	0	3000	USD	New	Sep 23, 2015 by Volodymyr Kukharenko	

4. Press **Save**.

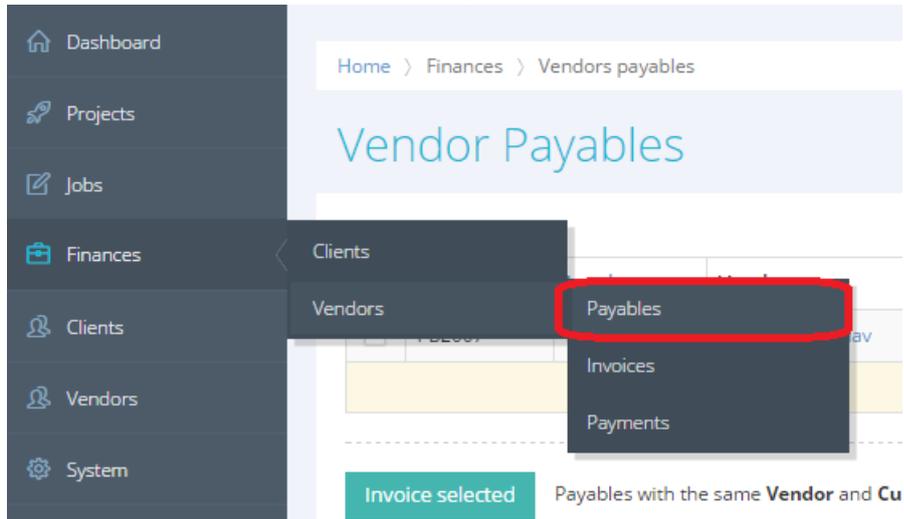
Now you have entered the payment in the system and completed the payment.

Invoices from vendors and payment control

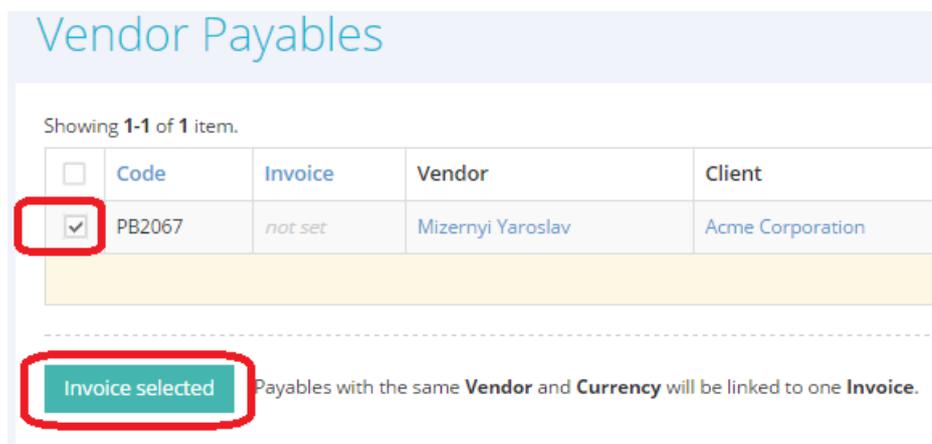


The vendors can create invoices on their own or you can create their invoices as the company manager. Let's review the second option.

1. Go to the **Finances=>Vendors=Payables** menu:



The list of payables due to vendors will be displayed. Select the rows to be included in the invoice and press the **Invoice selected** button:



Note: If the vendor's name is highlighted in red in the table, it means that payment method was not selected for this vendor and it's impossible to create an invoice for this vendor's jobs. To create an invoice, select the payment method for the vendor (click the vendor's name and add the payment method as described in the ["Add vendors"](#) section).

2. The system will create the invoice, send it to the vendor by email and open its page:

Invoice details

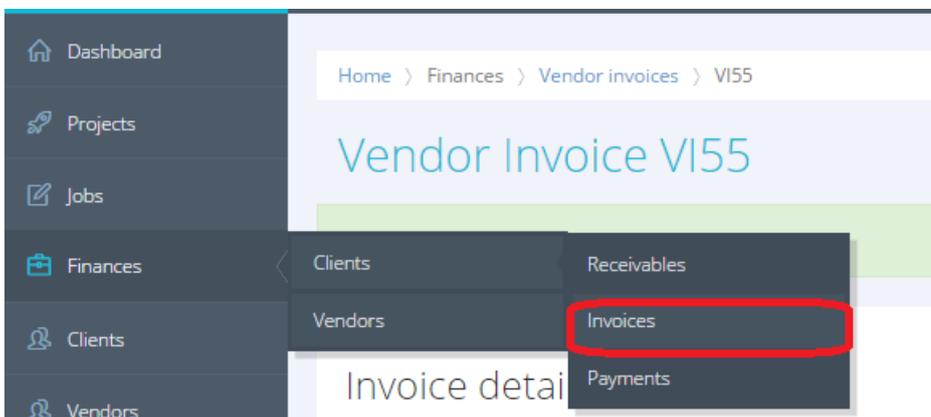
Invoice	VI55
Vendor	Mizernyi Yaroslav
Payment method	Cash
Currency	EUR - Euro
Total amount	1,400.00 EUR
Paid	0.00 EUR
Unpaid	1,400.00 EUR
Status	New
Due date	Oct 23, 2015 <i>in 29 days</i>
Created	Sep 23, 2015 by Volodymyr Kukhareno
Payments	<i>no linked payments</i>
Notes	<i>empty</i>

[Update details](#)
[Download as PDF](#)
[Delete](#)

3. You can do the following:

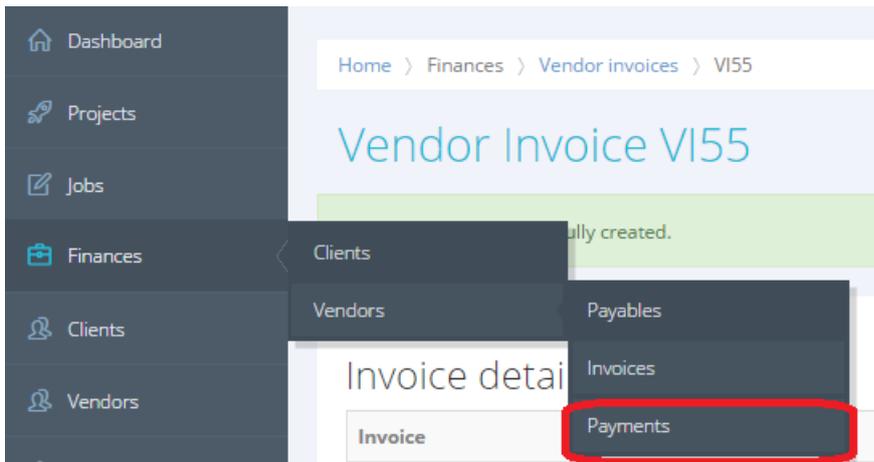
- Edit the invoice using the **Update details** button
- Download the invoice as PDF file by pressing the **Download as PDF** button
- Delete the invoice by pressing the **Delete** button

View the list of all the vendors' invoices in **Finances=>Vendors=>Invoices**:

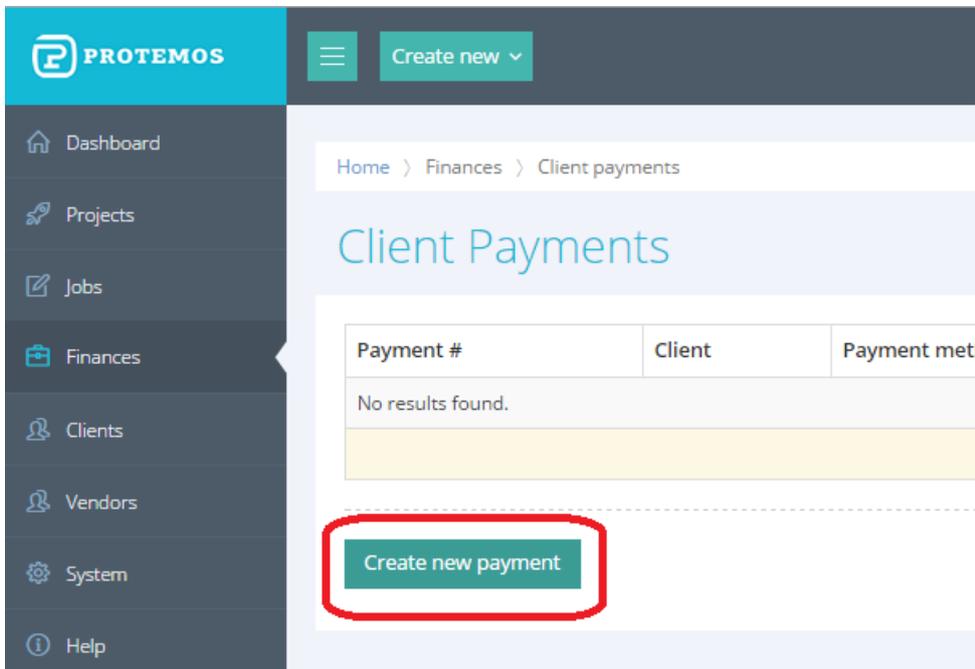


Having paid the vendors' invoices, you need to enter those payments in the system. To do so, complete the following steps:

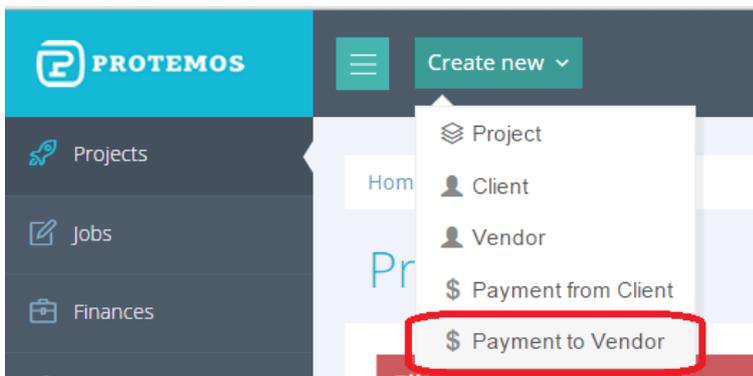
1. Go to the **Finances=>Vendors=>Payments** menu:



2. Press the **Create new payment** button:



*Note: In addition, you can create the payment for a vendor using the **Create new** menu:*



3. Enter the payment completed to the vendor and select the invoices covered by that payment from the list.
4. Press **Save**.

Now the payment has been entered in the system and you've completed the payment to the vendor.

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.

Projects filter

Projects

Apply
Reset
Filter ^

<p>Project manager <input style="width: 90%;" type="text"/></p> <p>Client <input style="width: 90%;" type="text"/></p> <p>Vendor <input style="width: 90%;" type="text"/></p> <p>Statuses <input type="checkbox"/> Potential <input type="checkbox"/> Active <input type="checkbox"/> Completed <input type="checkbox"/> Cancelled</p>	<p>PO number <input style="width: 90%;" type="text"/></p> <p>Project name <input style="width: 90%;" type="text"/></p> <p>Description <input style="width: 90%;" type="text"/></p> <p><input type="checkbox"/> Free of charge <input type="checkbox"/> No receivables</p> <p><input type="checkbox"/> No payables <input type="checkbox"/> No jobs</p>
--	--

Project manager — displays only the projects for a specific manager

Client — displays only the projects for a specific client

Vendor — displays only the projects where a selected vendor was engaged

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

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

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

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

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

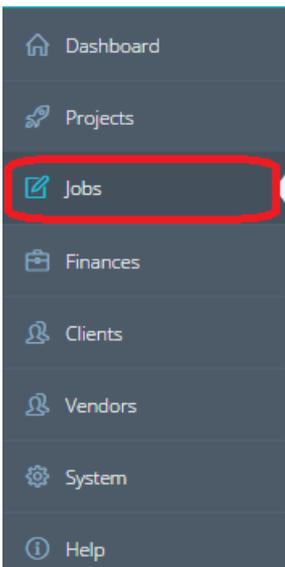
No receivables — displays only the projects with no receivables entered to pay by the client

No payables — displays only the projects containing the jobs without payables entered for the vendor

No jobs — displays only the projects containing no jobs

Jobs filter

Click the **Jobs** menu on the side panel to display the list of jobs for the vendors in all the projects:



The following filter is provided for that list:

Project manager

Vendor

Statuses Draft Started Canceled In Work Declined Completed Rejected Accepted

Job name

Finances Free of charge No payables

Project manager — displays only the jobs issued by a specific manager

Vendor — displays only the projects fulfilled by the selected vendor

Draft/Started /Canceled /In Work/Declined/Completed/Rejected/Accepted — displays only the jobs with the specified status

Job name — displays only the jobs with the name containing the specified text

Free of charge — displays only the jobs marked as free of charge

No payables — displays only the jobs with no payable entered for the vendor

Filter of client receivables

Project manager

Client

PO number

No invoice

No PO number

Project manager — displays only the receivables for the projects added by a specific manager

Client — displays only the receivables for the selected client

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

No invoice — displays only the receivables with no invoice

No PO number — displays only the receivables with no PO number entered

Filter of vendor payables

Project manager	<input type="text"/>	<input type="checkbox"/> No invoice
Vendor	<input type="text"/>	

Project manager — displays only the payables for the jobs added by a specific manager

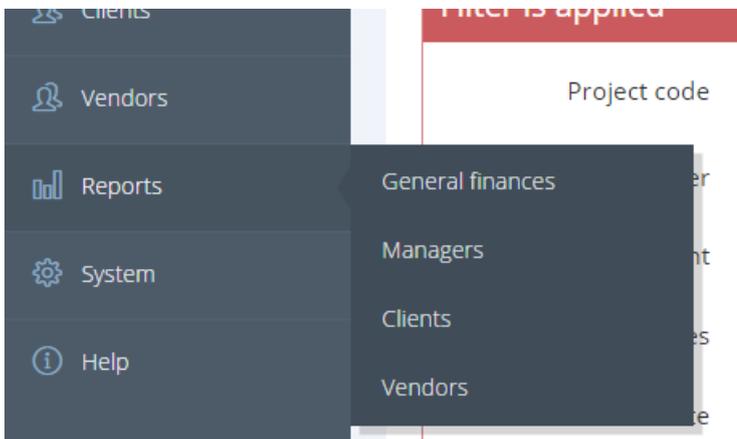
Vendor — displays only the payables for the selected vendor

No invoice — displays only the payables with no invoice

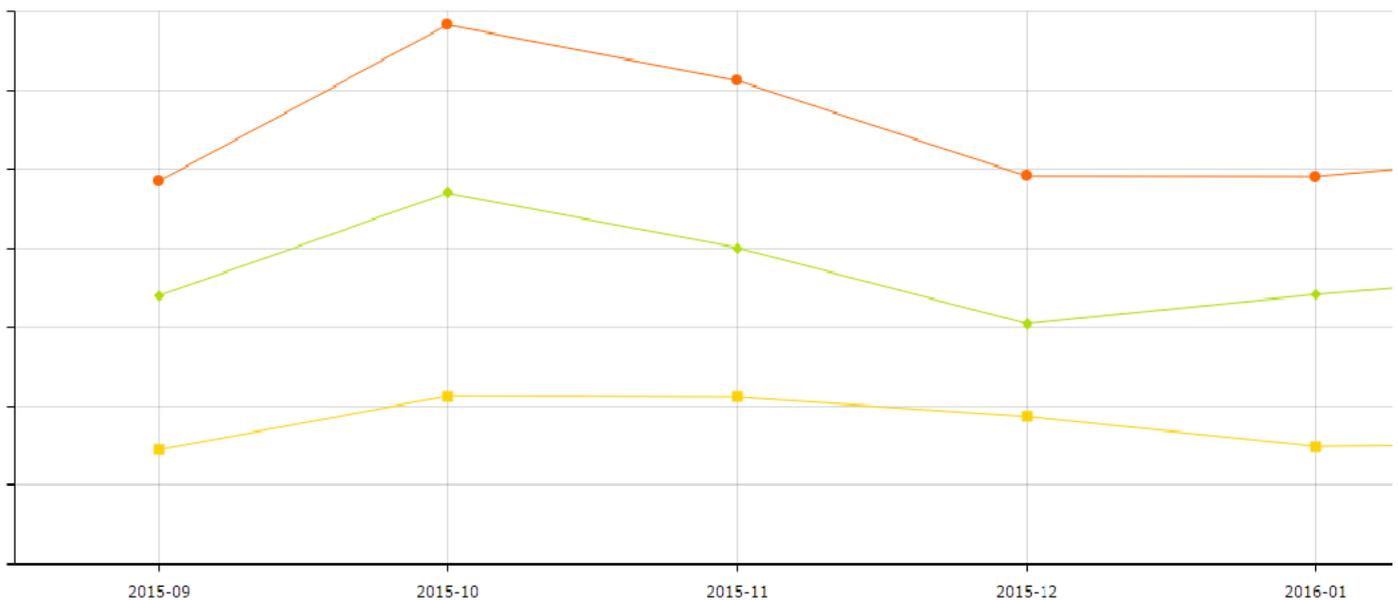
Reports



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

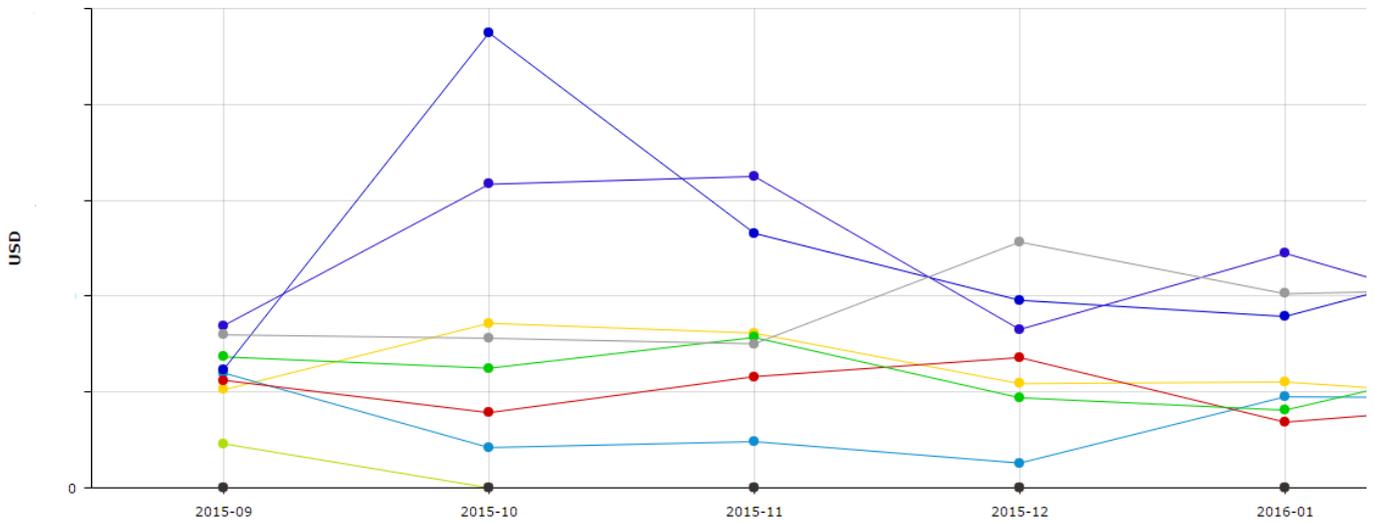


General finances: Shows dynamics of how revenues, income and expenses change over months:

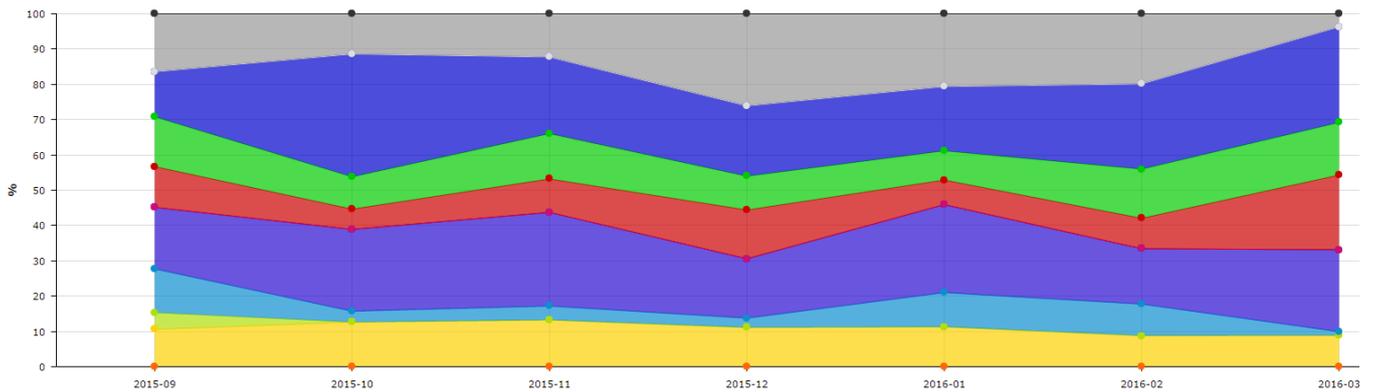


Managers: Shows the report on turnover and income in the projects of specific managers:

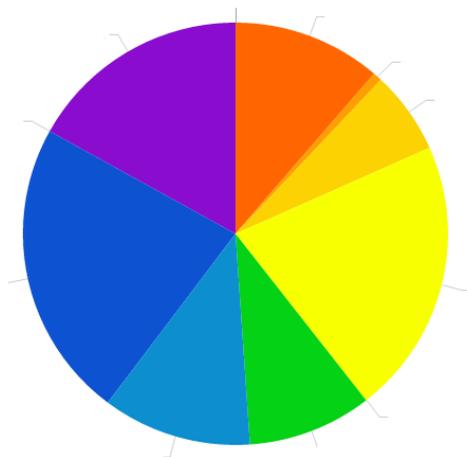
INCOME PER MANAGER AND MONTH BY PROJECTS



INCOME SHARE PER MANAGER AND MONTH BY PROJECTS



INCOME SHARE PER MANAGER BY PROJECTS



Clients: Shows the report on turnover and income in the projects of specific clients:

Vendors: Shows the report on expenses for vendors.

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 bit 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.