



Projetex 9 Accountant — Reference Guide

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1 Introduction

This guide covers some of the [Projetex](#) features most often used by accounting staff. These are:

- Viewing accounts payable and accounts receivable of clients and freelance translators.
- Monitoring and updating currency exchange rates between base currency and client/freelancer currencies.
- Issuing invoices to clients.
- Managing payments from clients and settling invoices.
- Monitoring purchase orders to freelance translators.
- Registering invoices from freelance translators.
- Managing payments to freelance translators.

For more information on other topics, like filtering data, reporting and exporting, please refer to other [Projetex](#) guides, which can be downloaded from the following web page:

<http://www.projetex.com/documentation>

2 Interface Overview

2.1 Navigation

Navigation panel is a part of **Projetex** user interface simplifying and quickening navigation in the program.

It consists of four groups of icons: **Clients**, **Projects**, **Corporate Team**, and **Freelancers** each containing icons for accessing various related windows.

You can hide navigation panel to free display space by clicking left edge of the screen.

Use **Navigation** menu to switch between **Classic** and **Modern style** of navigation bar.

Client group of icons



Client window displays all information about the taken client. Client data is broken down by the following tabs: **Main**, **Contacts**, **Marketing**, **Prices**, **Quotes**, **Projects**, **Client Jobs**, **Invoices**, **Payments**, **Balance**, **Files**, **Info**, **Schedule**.



General Prices for Clients window provides access to general price list: each price representing a rate in chosen currency for certain service (language pairs, translation, proofreading, etc.).



Quotes to Clients window provides access to all currently created client quotes. This window can be used to create a new project based on a quote, add/edit/delete draft jobs for existing quotes.



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, edit and delete client jobs.



Invoices to Clients window provides access to all currently issued invoices. Use this window to calculate invoice totals, view and edit invoices, print any of these invoices, perform Mass Invoicing.



Payments from Clients window lists all payments received from all Clients. Use this window to calculate payment totals, link payments with invoices, edit, delete payments and perform Mass Payments.



Balance of Clients window displays a simplified balance sheet broken by clients based on payments from clients and invoices to clients. Accounting staff can use this window to identify which of clients' accounts require attention. Can be viewed in Base Currency or Client Currencies.



Schedule of Projects window displays block diagram of all projects for the specified period. Schedules are grouped by clients.

Corporate Team group of icons



Corporate Expert window displays consolidated information about the specific in-house expert. Corporate expert data is broken down by the following tabs: **Main**, **Corporate Jobs**, **JAs**, **Files**, **Info**, **Schedule**.



Corporate Jobs window displays the list of all jobs created for in-house experts. With the help of this window you can have a quick overview of all corporate job statuses, calculate corporate job totals, edit and delete corporate jobs.



Job Assignments window displays the list of all currently issued job assignments to all corporate experts.



Corporate Expenses window can be used to make and view entries about any expenses that are not concerned with paying in-house and freelance experts.



Schedule of Corporate Expert Jobs window displays block diagram of all corporate jobs for the specified period. Schedules are grouped by corporate experts.

Freelancers group of icons



Freelance Expert window displays consolidated information about the certain freelancer. Freelance expert data is broken down by the following tabs: **Main**, **Application**, **Prices**, **Quotes**, **Freelance Jobs**, **POs**, **Payments**, **Balance**, **Files**, **Info**, **Schedule**.



General prices for Freelancers window, where you can manage your general tariffs for freelance expert services: set price in chosen currency for each service.



Quotes from Freelancers icon opens window displaying detailed information on all quotes from freelancers stored in database.



Freelance Jobs window displays the list of all jobs created for freelance experts. With the help of this window you can have a quick overview of all freelance job statuses, view if the jobs have been included in purchase orders, calculate freelance job totals, edit and delete freelance jobs.



POs to Freelancers window displays all currently issued purchase orders for freelance jobs. Use this window to calculate PO totals, view and edit POs, print any of these POs.



Payments to Freelancers window lists all payments sent to all freelancers. Use this window to calculate payment totals, link payments with purchase orders, edit and delete payments.



Balances of Freelancers window displays a simplified balance sheet broken by freelancers based on purchase orders and payments to freelancers. Accounting staff can use this window to identify which accounts require attention. Can be viewed in Base Currency or Client Currencies.



Schedule of Freelance Expert Jobs window displays block diagram of all freelance expert jobs for the specified period. Schedules are grouped by corporate experts.

2.2 Button Panel

Button Panel is located at the bottom of Projetex Workstation window. It consists of six groups of buttons: **History**, **Jump**, **Open Folders**, **Local Custom Filter**, **Local Report**, **Global Date Filter**.



History buttons

Back button switches Projetex to the previously visited tab or window.

Forward button brings you to the tab or window which was opened before you clicked **Back** button.

Jump buttons

After clicking **Client** button you jump to the **Client** window, the tab depends on the window opened and element selected at the moment you clicked.

Example:

Quotes to Clients window is opened, certain client record is selected from the list. If you click **Client** button Projetex switches to **Quotes** tab of **Client** window displaying data for the same client.

Project and **Expert** buttons work similarly to **Client** button.

Project button switches to certain tab of the **Project** window, displaying data for selected project.

Expert button switches to certain tab of the **Expert** window, displaying data for selected expert.

Open Folders buttons

Using **Open Folders** drop-down list you can easily switch between the folders opened during the current Projetex working session. Any work folder you open in Projetex (using **Explore** buttons) is automatically added to the list. When you need to switch between the opened folders, select the necessary folder in the drop-down list and click **Go** button.

Local Custom Filter buttons

Use **Local Custom Filter** buttons to construct filter conditions, thus simplifying the search of necessary records in your Projetex database. For example, you can build the filter to display only projects of a particular project manager which are due today.

Edit button opens **Edit Filter** window.

On/Off button applies or disables the currently configured filter.

Recent button applies the last created filter (last used filter settings).

Local Report buttons

Local Report buttons give you possibility to save the content of **Projetex** window currently displayed (save it in a separate file of defined format or print).

Export button opens **Export** window, where you can choose the required format of output file.

Print button opens the preview of the document you are about to print.

Global Date Filter buttons

Global Date Filter buttons are designed to filter records according to user defined date conditions.

Edit button opens **Edit Global Date Filter** window.

On/Off button correspondingly switches on/switches off the date filter.

Recent button switches on the last created data filter.

2.3 Local Custom Filter

Local Custom Filter can be used to search specific data in large tables. In the white area of **Edit Filter** window current filter conditions are displayed.

Open button browses for previously saved filter settings.

Save button saves current settings of *Local Custom Filter* in the *Projetex Workstation* setup folder.

Add button adds another filtering condition.

Delete button deletes currently selected filter condition.

Clear button deletes all current filter conditions.

3 Setting currencies and services

In *Projetex* you can assign individual *client currency* to each *client*, *expert currency* to each *freelancer*, and still, be able to see 'the whole picture' using your *base currency*. This chapter will help you to understand how currencies are handled in *Projetex*.

Setting base currency

Base currency represents your local currency, in which your company conducts accounting.

Base currency can be changed on **Corporate Settings** tab of *Projetex Server Administrator*. To do so:

Run *Projetex Server Administrator*.

- Click **Database** tab.
- Put your database offline by clicking **Go offline** button.
- Once database is offline, switch to **Corporate Settings** tab and click **General Settings**.
- Click **Base Currency** button and select the necessary currency in **Edit Base Currency** window:
- Make sure that the base currency is set correctly before starting your work in *Projetex*.

Adding new currencies

Since the currencies of your clients and freelancers may be different from yours, you will need to add new currencies to your *Projetex* database and to *define their exchange rates* relating to your base currency.

To define currency settings:

1. Open *Projetex Workstation* and select **Corporate** command of **Settings** menu.
2. In **Corporate Settings** window, click **Currencies**.
3. If some of the currencies that you need are not included into the list, you may add them by clicking **New** button. You can also edit or delete an existing currencies.

Setting exchange rates

You can *enter exchange rates* between your base currency and any of the other currencies. Exchange rates of currencies are used for keeping parallel records in both base currency and client/freelancer currencies relating to your base currency.

To enter an exchange rate, click **Exchange Rates** section in **Corporate Settings** window.

To add new currency exchange rate, click **New** button.

Select the currency from the drop-down list, enter its rate relating to your *base currency* and click **OK**.

4 Clients

4.1 Client Window

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.

Client Window tabs

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

- **Main** tab — contains profiles of your clients. Client records can be created and marked as completed here. This tab also contains client profiles.
- **Contacts** tab — lists contacts of the selected client. New client contacts can be added here.
- **Marketing** tab — contains marketing information added by your sales representatives or marketing staff.
- **Prices** tab — holds individual price list of selected client. Here this client's prices can be created and edited.
- **Quotes** tab — is used for issuing and managing quotes offered to the selected client.
- **Projects** and **Client Jobs** tabs — these tabs contain projects and client jobs of the selected client.
- **Invoices** and **Payments** tabs — these tabs hold all invoices issued and payments made of the selected client. Here invoices are created, and linked with payments.
- **Balance** tab — provides the most basic overview of financial accounts of the selected client.
- **Files** tab — this tab is used for accessing selected client's files and folders.
- **Info** tab — is used for adding various client-related notes.
- **Schedule** tab — displays schematic schedules of projects and client jobs of the selected client.

4.1.1 Main Tab of Client Window

Main tab of **Client** window can be used to manage your database of clients. It contains the list of all clients and their profiles.

Clients list

You can search clients by name with the help of **Starts with** and **Contains** filters. Select **Starts with** option and enter first few letters of client's name in the field, and the cursor will jump to highlight first matching client's name in the list. Select contains option and enter any part of client's name being searched.

- Click any client in the list to view profile of this client to the right.
- Double-click any client in the list to edit their name, client code and change client currency.
- Once a new client has been added, his data can be edited in this profile.
- You can create a new client record based on data (profile, marketing, contact or pricing) of one of the existing clients by cloning this client. To do so, select a client to clone, and click **Clone** button.
- 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 **Delete** button.
- Each client can have a flag assigned to it. Client flag can be changed by right-clicking the narrow field displaying flags.

Clients are listed in the form of table. Although by default this table contains single column (**Name**), you can add your custom fields to view by right-clicking the client list and then clicking **Customize Columns** in the context menu.

 **Note:** Due to user access restrictions, some filter operations (like local custom filter and global date filter) or page settings, you may not be able to see all the clients in the database. **Summary** at the bottom of clients list displays if all of the clients are shown.

Client profile

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

- **Client 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.
- **Name** — click this button to edit this client's name. This name can be up to 150 characters long.
- **Account Managers** — this field lists client accounts and account managers assigned to them. Click **Account Managers** button to *assign or remove Account Managers* to this client's

accounts.

 **Note:** Only users with advanced access rights can assign account managers.

- **Postal Address** — click this button to add or change a postal address of the client.
- **Contact Info** button — allows you to add or change contact information of the client.
- **Web site** — opens **Edit Website of Client** dialog box, providing field for entering a web site address (URL) of your client. Click **Go** button to open this site in your Internet browser. Web site address can be up to 120 characters long.
- **Payment Terms** — allows you to specify payment terms for each client, and their minimum fees. According to this information **Projetex** will determine if your invoices to client are outstanding, overdue or will be due soon.
- **VAT Number** — enter client's legal tax number to have it automatically displayed and printed on invoices.
- **Client Folder** — this part of client's profile can be used to quickly create client's folder and access client files. Click **Create** button to automatically create a folder, tied to this client. The location of client folder will depend on the **location of centralized Business folder**, assigned with the help of **Projetex Server**. **Explore** button becomes active only after client folder has been created. Click it to open the client's folder in the Windows Explorer window.
- **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 client currency, converted according to exchange rates which you set.
- **Next Codes** — click this button to edit the automatic counters for client-specific codes of quotes, client jobs, invoices and payments. **Projetex** will use the codes for the next quote, client job, invoice and payment you create. You can only increase the next code value.
- **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.
- **Invoicing Policy** — by adjusting invoicing policy you determine conditions upon which **Projetex** will prompt you to invoice client jobs.
- **FTP connections** — you can set parameters for access to FTP folders of this client. Shortcuts to these folders will be automatically added to **Files** tab of this client's window.
- **General Information** — any additional information which did not fit into any of the other sections can be entered here.

Client accounts

To add or delete client accounts, click **Client Accounts** tab. All accounts of currently selected client can be viewed on the **Client Accounts** tab.

 **Note:** Only users with advanced access rights have access to this tab.

Custom data of client

Client database can be customized by adding custom fields. Any custom fields which have been added to clients database, can be accessed by clicking **Custom** tab, next to the **Client Profile** tab.

 **Note:** Only users with access to [Projetex Server Administrator](#) can add or remove custom fields.

4.1.1.1 Postal address of client

Postal address of client 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 50 characters maximum. When editing invoice and quote templates you can choose which of the two addresses are contained in invoice or 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 Client** window. See Countries topic for details.

ZIP Code — maximum 10 characters long.

4.1.1.2 General contact information

Clients in [Projetex](#) have two types of contact information: general and contact information of client's contact persons (Contacts of Client). General contact information of a client can contain the following data:

E-mail (up to 2) — maximum 250 characters. **Send** button becomes active only if 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 a number of characters.

General contact information of a client can also be added to templates with the help of Client Information Variables.

4.1.1.3 Payment terms of client

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

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

You can also indicate if invoice should be paid within certain time (30, 45, 60, or 90 days) from the day it was sent (invoice issue date) or on certain day of certain month.

Select **Unknown/Other** to disable automatic payment terms control.

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

4.1.1.4 Next client codes

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

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

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

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

4.1.1.5 Locale format of client

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

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

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

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

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

 **Note:** To map brief day or month ("*Mon*" instead of "*Monday*" or "*Mar*" instead of "*March*") enter 3 *d* or 3 *m* characters instead of four.

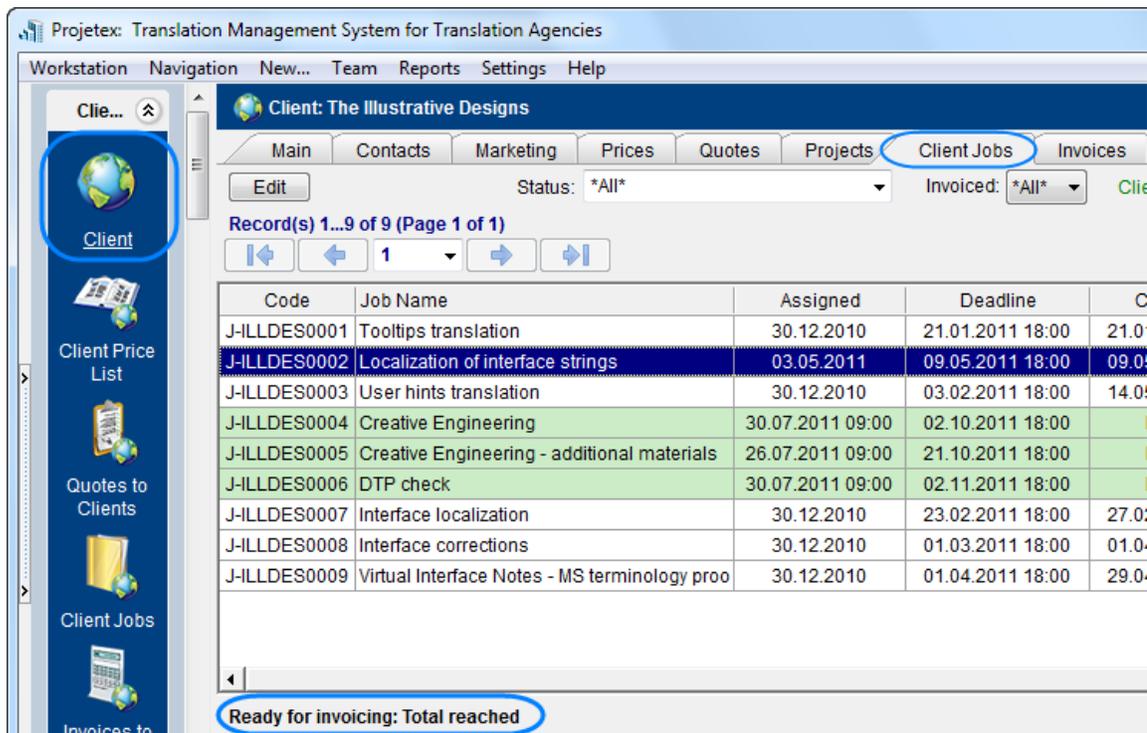
 **Note:** Full day or month names can be displayed in short date format by typing 3 or 4 characters in **Short Date Format** field.

To configure locale settings for certain client, click **Locale Format** button in this *client's profile* and choose **Custom Values** from **Generation of RTF files** drop-down list.

4.1.1.6 Invoicing policy of client

Invoicing policy settings determine when **Projetex** alerts user to invoice a client job. According to these settings **Projetex** will assign one of the following statuses to uninvoiced client jobs: **Not ready for invoicing** or **Ready for invoicing**, following by comment, depending on the current *invoicing policy settings*, for example, "**Total reached**".

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



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

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

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

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

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

4.1.2 Contacts Tab of Client Window

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

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

New button opens **New Contact** window, where details of a new contact person can be added.

Edit button opens **Edit Contact** window, where details of currently selected contact person can be edited.

Delete button deletes currently selected contact.

Clone button creates a complete copy of currently selected contact and adds it to the list of this client's contacts. Cloned contact will have (*Cloned contact*) text in front of a contact name.

4.1.3 Marketing Tab of Client Window

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

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). **Date** and **Subject** fields of a record cannot be empty. Records in **Marketing Tracker** can be sorted by **Date** or by **Subject**.

4.1.4 Prices Tab of Client Window

Each client in Projetex can have a set of prices individual for this particular client. These prices can be assigned on the **Prices** tab of **Client** window.

Only one price per group of services, service and unit combination can exist in individual price-list.

New button opens **New Price** window, where details of a new price can be added.

Edit button opens **Edit Price** window, where details of currently selected price can be edited.

Delete button deletes currently selected price.

Copy from General button opens **Copy from General Prices to Clients** window which can be used to copy prices from *general* price-list for clients to *client-specific* price-list.

You can print client's price list or save it in a text file by selecting the template and clicking **Save**, **Save & Open** or **Print** button at the bottom of the window.

4.1.5 Quotes Tab of Client Window

Quotes tab of **Client** window is designed to create and manage quotes for each client in database. A quote can contain a number of draft client jobs, each job representing a service and its price being quoted. Like the most of workflow documents in **Projetex**, quotes can be saved to a printable file or printed.

Client Quote Buttons

Quote management buttons are located on the left side of **Quotes** tab of **Client** window.

New Quote button opens **New Client Quote** window, where details of a new client quote can be added.

Edit button opens **Edit Client Quote** window, where details of currently selected quote can be edited.

Delete button deletes currently selected quote.

Create Project Based on Quote button will create a new project for the current client, based on data from currently selected quote. If a quote folder contains any files, **Projetex** will query whether these files must be copied to project folder of a new project.

Draft Client Job Buttons

Buttons for management of draft client jobs are located on the right side of **Quotes** tab of **Client** window.

New button opens **New Draft Client Job** window, where details of a new draft client job can be added.

Edit button opens **Edit Draft Client Job** window, where details of currently selected draft client job can be edited.

Delete button deletes currently selected draft client job.

Quote Filters

Status filter drop-down list can be used to display only the quotes with certain status.

Client Quote Status

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

- **Blue** for unknown quote status
- **Green** for accepted quote status

- **Red** for rejected quote status

 **Note:** You can change colors on the **Colors: Status tab** of the **Current User Settings**.

4.1.6 Projects Tab of Client Window

All projects of the currently selected client are listed 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 once certain client.

Project Filters

Status filter drop-down list can be set to display only projects with a particular status.

Project Manager filter drop-down list can be set to display only projects led by certain project manager.

Project Statuses

Projects in the list are shown in different colors. These determine 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*.

4.1.7 Client Jobs Tab of Client Window

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 **Status** filter drop-down list to display only Completed, Not Completed, or Overdue client jobs.

With the help of **Invoiced** filter drop-down list you can view only those client jobs which have or have not been invoiced.

If you have set invoicing policy for this client in this client's profile on the **Main** tab of **Client** window, Projex 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 determine current status of each client job:

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*.

 **Note:** You can change colors on the **Colors: Status tab** of the **Current User Settings**.

Also, if a job has any status other than **Normal**, it will be highlighted either in red or in green:

Job Name	
Engine shceme ER-34221	This Job has On Hold status
Veni Vidi Vici	This Job has Planned status
Nam tempus	

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

 **Note:** To configure status colors on the **Settings** menu click **Current user**, then click **Colors: Status**.

4.1.8 Invoices Tab of Client Window

Invoices in Projetex are issued per client jobs. One invoice can contain a number of client jobs from different projects. Client job, which has been added to an approved invoice cannot be edited.

Invoices tab of the **Client** window is used to issue and keep track of invoices to currently selected client. All invoices issued to this client are displayed in the table.

New button opens **New Invoice** window, where a new invoice to client can be created.

Edit button opens **Edit Invoice** window, where details of currently selected invoice can be edited.

Delete button deletes currently selected invoice.

Void button voids currently selected invoice without deleting it.

Invoice Filters

You can view only fully paid or only unpaid (outstanding) invoices. To display only invoices with a particular status click **Status** filter drop-down list.

You can set Projetex to display only those invoices which have or have not been approved by project manager by applying **Approved** filter.

Invoice Statuses

Invoices in the list are shown in different colors. These determine current status of each invoice:

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

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

Red — invoice is *outstanding* and its *payment is overdue*.

Black — invoice has been *settled* (paid) or has been voided.

 **Note:** You can change colors on the **Colors: Status tab** of the **Current User Settings**.

4.1.9 Payments Tab of Client Window

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

Payments can be fully or partially linked with invoices to settle them. Payments are also added to company profits analysis on balance tabs.

By default payments values are displayed in client's currency. Right-click the table and click **Customize columns** command to define the payment data which must be displayed.

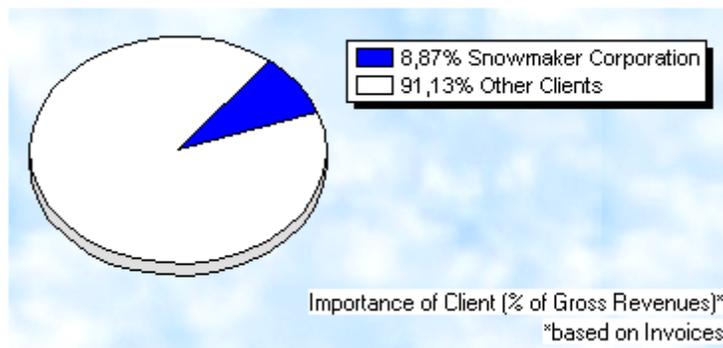
Payment Filter

Use **Status** filter drop-down list to display only payments which are still to be linked with invoices, or only those, whole amounts of which have been linked with invoices.

4.1.10 Balance Tab of Client Window

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

- Totals of payments, total invoices and account balance;
- Pie chart showing the share of this client in Gross Revenues.

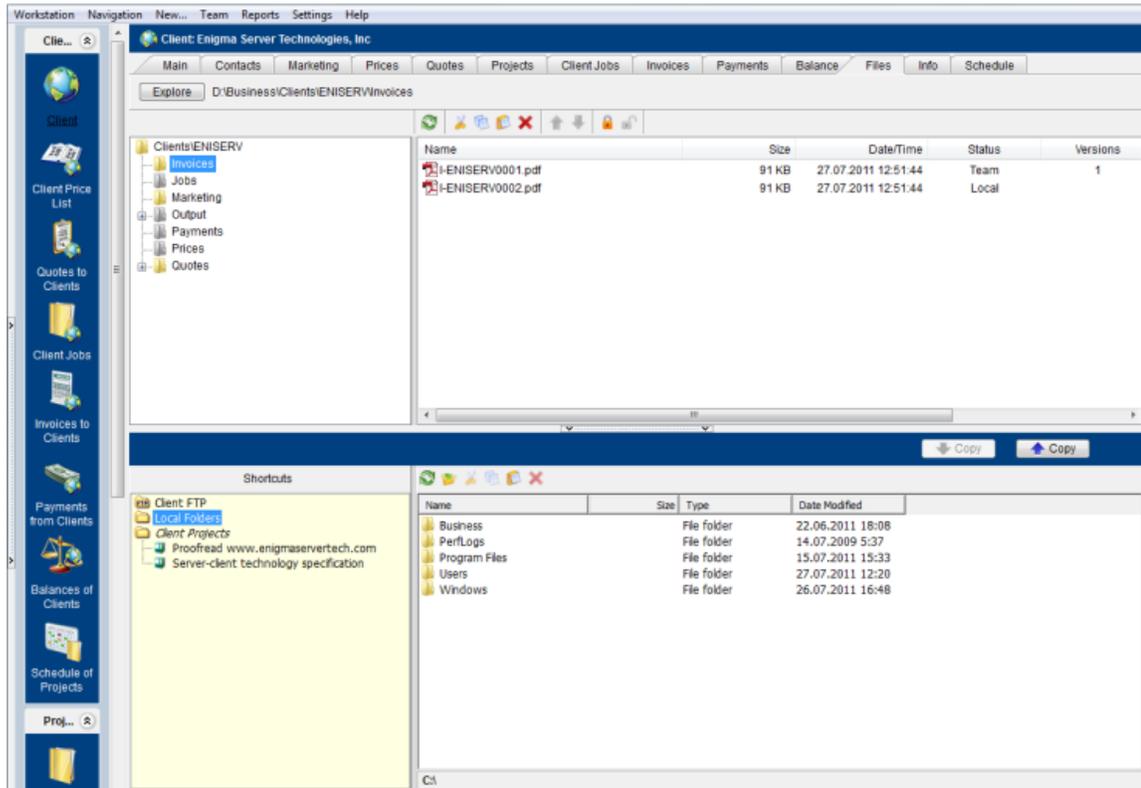


To open **Account** tab, open **Client** window and then click **Account** tab.

4.1.11 Files Tab of Client Window

Files tab of **Client** window can be used to create a new client folder with one click, create, view and search for files and folders related to this client.

Files of client contain invoices and quotes to this client.



Window contains two horizontal panes. Upper pane shows the folder tree for selected client folder and content of the currently selected subfolder. Pane underneath allows to open shortcuts. Clicking any of the shortcuts options will create a second file view field to the right, and open appropriate folder there. This allows to simultaneously work with two opened folders in the same window.

Files can be exchanged between client folder and external resources (local folders, FTP) using **Copy** button.



- is used to copy file from path currently opened in Shortcuts pane to client folder .



- is used to copy file from client folder to path currently opened in Shortcuts pane.

Context menu contains the following specific file operations:

Open command opens the file in appropriate application

Upload command uploads the file from local *Business* folder to *BusinessServer* folder on Projetex

Server Administrator PC.

Download can be used to download the file *BusinessServer* folder on *Projetex Server Administrator PC* to *Business* folder on *Workstation PC*.

Download version opens window that contains information about all versions of particular files.

Each file can have one of the following statuses:

Current - the files stored in *BusinessServer* folder on server and in local storage are identical.

Modified - local copy of file has been modified, the file on server has not been updated.

Out of date - file on server has been modified, local copy has not been updated.

Missing - file exists on server, but has not been downloaded to local PC yet (or have been deleted locally).

Not in view - file exists locally, but has not been uploaded to server yet (or have been deleted on server).

4.1.12 Info Tab of Client Window

Info tab of the **Client** window can be used to enter any optional additional information regarding the selected client in plain text format. These notes will be available for all project manager users.

Each note record consists of the following elements:

- **Subject** — maximum 100 characters long.
- **Category** — categories of notes can be added with the help of **Settings** menu.
- **Information** — plain text note any number of characters long.

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

4.2 Client Price List

Client Price List window displays your general price-list. These prices can be used when creating quotes, jobs and invoices for any client in your database.

Double-click any price record in the table to edit that price.

Save button saves current price list in an *RTF*, *DOC* or *PDF* document.

Save & Open button saves current price list in *RTF*, *DOC* or *PDF* format, and then opens this document.

Print button opens printer settings, which can be used to print the document.

To configure price list templates, on the **Settings** menu click **Corporate** command and then click **Templates**. Templates for prices are stored in *D:\BusinessServer\Templates\CLIENTS\Prices* folder.

4.3 Quotes to Clients

Quotes to Clients window provides an overview of all quotes, issued to all clients. The options available for this window are the same as those for **Quotes tab of 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 client, open **Main tab** of **Client window**, select that client, then switch to **Quotes tab** of **Client window** and create your quote from there.

To quickly create a project based on a quote, select it and click **Create project Based on Quote** button. This will create a project with the same timeline and client jobs as in the quote on which this project is based. If a quote folder contains any files, **Projex** will query whether these files must be copied to project folder of a new project.

 **Note:** After a project based on a quote has been created, information about the quote related to this project will be available in Edit Project window and in Project profile of Project window.

Quote Status

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

- **Blue** for unknown quote status
- **Green** for accepted quote status
- **Red** for rejected quote status

 **Note:** You can change colors on the **Colors: Status tab** of the **Current User Settings**.

4.4 Client Jobs

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 **Client Jobs** tab of **Project** window. The major differences are:

- **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.

Client Job Filters

Use **Status** filter drop-down list to display only *completed*, *not completed*, or *overdue* client jobs.

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

Client jobs can also be filtered by *Project Manager* responsible for them.

If you have set *invoicing policy* for this client in this client's profile on the **Main** tab of **Client** window, **Projetex** 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 determine current status of each client job:

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*.

 **Note:** You can change colors on the **Colors: Status tab** of the **Current User Settings**.

Also, if a job has any status other than **Normal**, it will be highlighted either in red or in green:

Job Name	
Engine shceme ER-34221	This Job has On Hold status
Veni Vidi Vici	This Job has Planned status
Nam tempus	

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

4.5 Invoices to Clients

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

- **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.

Mass Invoicing button can be used to quickly create multiple invoices for multiple different clients with a few clicks.

Invoice Filters

Use **Status** filter drop-down list to display only invoices with *Outstanding*, *Fully Paid*, and *Void* status.

Use **Approved** filter drop-down list you can select to display only those invoices which have or have not been approved by project manager.

Invoice Status

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

Green — invoice is *Outstanding* and is expected to be paid soon.

Blue — invoice is *Outstanding* and is expected to be paid today.

Red — invoice is *Outstanding* and its payment is overdue.

Black — invoice has been *Settled (paid)*.

 **Note:** You can change colors on the **Colors: Status tab** of the **Current User Settings**.

Projetex automatically assigns statuses to Invoices depending on Payment Terms set for each client.

4.6 Payments from Clients

Payments from Clients 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.

Mass Payments button button can be used to quickly create multiple invoices to multiple different clients with a few clicks.

Payment Filter

Use **Status** filter drop-down list to display only payments which are still need to be linked with invoices, or only those, which whole amounts have been already linked with invoices.

4.7 Balances of Clients

Balance of Clients window presents a simplified balance of your clients, based on their payments and invoices. It has the following figures:

- **Total Invoices (All Clients)** — sum of all invoice totals of all clients.
- **Total Payments (All Clients)** — sum of all payments from all clients.
- **Accounts Receivable** — margin between **Total Invoices** and **Total Payments** figures.

This balance can be viewed separately per each of the clients in the table below.

Accounts can be viewed both in client and your base currency: use **View** drop-down list to select in which currency do you wish to view records. Alternatively you can right-click the table and use **Customize columns** option to add columns to view. The columns containing currency abbreviation in their header display records in your base currency.

 **Note:** To view global balance, select **Base Currency** option in **View** drop-down list.

4.8 Schedule of Projects

Schedule of Projects window displays schedules of all projects which fall into the scope of the selected period. The schedules are grouped by clients.

Double-click any schedule representing the project to open **Edit Project** window for this project.

Settings for Schedule view

The following settings for the schedule page are available:

Selected period: - enter start and finish date of date range using calendars. Any changes to this setting will take into effect only after clicking **Apply** button.

Column scale - changes the the scale of a schedule. **1 hour**, **8 hours**, **12 hours** and **1 day** options are allowed.

Column width drop-down menu allows to configure width of the column to **Short**, **Normal** or **Large**.

Sort by option sorts the items in the schedule either by **Client name** or **Project Assigned** date.

Schedules of Projects colors

As well as the jobs they represent, job schedule bars can have different colors, depending on the statuses of respective jobs:

Green — job is *not completed* yet, but its *deadline is in the future*.

Blue — job is *not completed* and *due today*.

Red — job is *not completed* and *overdue* (its deadline is in the past).

Grey — job is *completed*.

Status drop-down menu in the upper right part of the **Schedule of Projects** window can be used to filter displayed schedules by status.

Double-click on the column will open the **Edit Project** window for that project.

5 Corporate Expenses

Any *expenses* other than *payments to freelancers* and *corporate jobs total cost* can be entered into database with the help of **Corporate Expenses** window. These expenses are used when calculating balance of projects.

To open the **Corporate Expenses** window click on the **Corporate Expenses** icon in the **Corporate Team** section of **Navigation** panel.

Corporate expense record contains default fields:

Date - the date when the expense was handled

Value - value of the corporate expense

Description - any additional information about the expense

Custom tab show custom fields for particular record. New custom fields can be created in **Custom Fields** section of **Corporate Settings** in **Projetex Server Administrator**.

6 General Freelancers Windows

6.1 Freelancer Window

Freelancer window can be used to effectively keep track on freelancers and their activities, update and search through your freelancer database, as well as to manage *freelance jobs*, *job assignments* and *files* of freelance experts.

To open **Freelancer** window click **Freelancer** icon from the **Freelancers** tab of the **Navigation** panel.

Freelancer Window tabs

Different tabs of **Freelancer** window represent different data, relevant to certain freelancers in your database. All data of freelancers is broken by the following tabs of the **Freelancer** window:

- **Main** tab — contains the *list of your freelancers* and their *profiles*. Here new freelancers can be entered into database.
- **Application** tab — contains application information of selected freelancer, added by HR staff.
- **Prices** tab — is used to enter and check price information of currently selected freelancer. Here prices of this freelancer can be created and edited.
- **Quotes** tab — contains quotation information, received from the currently selected freelancer.
- **Freelance Jobs** tab — gives an overview of freelance jobs assigned to selected freelancer.
- **POs** tab — is used for managing purchase orders (POs) for selected freelancer.
- **Payments** tab — holds information on payments made to the currently selected freelancer.
- **Balance** tab — provides basic overview of the financial balance of selected freelancer.
- **Files** tab — provides quick access for selected freelancer's folder, as well as to other files related to this freelancer.
- **Info** tab — this tab is used for creating various notes related to the selected freelance expert.
- **Schedule** tab — gives a schematic overview of freelance jobs, presented in a form of **Schedules**

6.1.1 Main Tab of Freelancer Window

Main tab of **Freelancer** window contains information of your freelance experts. You can add new freelancer records here or edit existing ones. The two primary areas of **Main** tab of the **Freelance Expert** window are *freelancers list* and *freelancer profile*.

Browsing Freelancers

You can search freelancers by name. Select **Starts with** option and enter first few letters of freelancer's name in the field, and the cursor will jump to highlight first matching freelancer's name in the list. Select **Contains** option and enter any part of freelancer's name being searched.

To search freelancers by *price*, *service* or *completed* jobs, click **Search** button.

Click any freelancer in the list to view profile of this freelancer to the right.

Once a new freelancer has been added to database, his or her profile can be edited at any time.

Freelancers are listed in the form of table. Each freelancer can have a flag assigned to him or her. Freelancer flag can be changed by right-clicking the narrow field displaying flags. Although by default it contains **Name** and **Flag** columns, you can add your custom fields to view by right-clicking the freelancers list and then clicking **Customize Columns** in the context menu.

Freelancer profile

Profile of the currently selected freelancer can be viewed to the right.

Expert code — This code will be used in document (purchase order, quote) codes of this freelancer. Expert code will also be used as folder name of this freelancer's folder.

Name — Use this option to enter or edit the name of the currently selected freelancer. Freelancer's name can be no longer than 150 characters.

Postal Address — Enter address information of the currently selected freelancer. This information will be automatically inserted in the text of this freelancer's documents.

Contact info — Click this button to enter additional contact information on this freelancer.

Web-site — Click **Go** button to open this freelancer's web-site in your Internet browser. Web site address can be up to 120 characters long.

Payment Terms — You can set specific payment terms to each of your freelancers. Payment terms settings will determine when the purchase orders of this freelancer become *outstanding* and *overdue*.

VAT number — Regulations in some countries may require to indicate VAT codes (or numbers) in financial documents. Freelancer's VAT number, entered in freelancer's profile can be automatically displayed in this freelancer's printable documents.

Expert currency — Select currency of this particular expert. Expert's currency will be used in all documents of this freelancer. The totals of jobs will also be indicated in expert currency. General accounting data on experts will be presented in your *base currency*, according to defined *exchange*

rates.

Next codes — You can advance the code counters of *freelancer quote*, *freelance job*, *purchase order*, and *payment to freelancer*.

Locale format — Adjust these settings to make all documents, printed for the selected freelancer use individual locale format, specific to this freelancer.

Expert folder — Freelancer folder contains jobs, purchase orders, payments prices and quotes information of freelancer. Projetex automatically creates, updates and maintains links between freelance experts in database and their folders. Expert code of this freelancer is used as folder name. Once the folder has been created, its location in **Business folder** is displayed in **Expert folder** field. Click **Explore** button to open this folder in your file explorer.

FTP Connections — you can set parameters for access to FTP folders of this freelancer. Shortcuts to these folders will be automatically added to **Files** tab of this expert's window.

General Information — freelancer's profile can contain any general information, relevant to this freelancer in a form of plain text note.

Custom data of Freelancer

Client database can be customized by adding custom fields. Any custom fields that have been added to clients database can be accessed by clicking **Custom** tab next to the **Client Profile** tab.

 **Note:** Only users with access to Projetex **Server Administrator** can add or remove custom fields.

6.1.1.1 Postal address of freelancer

Postal address of freelancer determines this freelancer's country of residence, and is automatically added to purchase orders, as well as to quotes of this freelancer. 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 invoice and quote templates you can choose which of the two addresses invoice or quote should contain.

City — can be maximum 40 characters long.

State — maximum 40 characters long.

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

ZIP Code — maximum 10 characters long.

6.1.1.2 General Contact Information of freelancer

E-mail (up to 2) — maximum 250 characters. **Send** button becomes active only if 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.

6.1.1.3 Payment Terms of Freelancer

According to the payment terms of a freelancer, [Projetex](#) will keep track of unpaid POs and update status of outstanding purchase orders, making them overdue, due today, due tomorrow, and so on.

With the help of **Edit Payment Terms** dialog you can configure payment conditions of selected freelancer, including:

Minimum Fee — this is the minimum sum the POs must accumulate, before they can be paid. Type 0 in this field to disable **Minimum Fee** condition.

You can also indicate if PO should be paid within certain time (30, 45, 60, or 90 days) from the day it was sent (*PO issue date*) or on certain day of certain month.

Select **Unknown/Other** to disable automatic payment terms control.

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

6.1.1.4 Locale Format of Freelancer

Freelancers from different countries are very likely to have different locale formats. There is no need to change your own locale format each time you print purchase order for a freelancer, with locale format differs from yours.

To print purchase orders to freelancers according to their own *Regional and Language options* (defined in *Windows Control Panel*), *Projetex* can use separate locale format for each of your freelancers.

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 negative amount is indicated with a "minus" symbol put before number: -100.00. In other countries negative amount must be written in brackets: (100.00).

Decimal Symbol — this is the character which separates decimals. 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 — *Projetex* 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 freelancer does not have decimal units.

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* digit grouping symbol is space.

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

Short Date Format — this is format for the short date display (like *3,31,2008*). Enter required date format into this field or select one of the available formats using drop-down list. Use *d* to indicate day, *m* – for month, and *y* – for year. For example *dd.mm.yy* will result in date like *01.02.09*. Date separator characters can be entered manually in this field too. Otherwise — settings from **Date Separator** field will be applied.

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

 **Note:** To map brief day or month ("*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 short date format by typing 3 or 4 characters in **Short Date Format** field.

To configure locale settings for certain freelancer, click **Locale Format** button in this freelancer's profile and choose **Custom Values** from **Generation of RTF files** drop-down list.

6.1.1.5 Next Codes of Freelancer

Codes of *freelancer quotes*, *freelance jobs*, *purchase orders* and *payments* are generated automatically each time a new quote, freelance job, payment or PO is entered into database. Prefix of these codes depends on freelancer's name. The digits after — represent the counter code.

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

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

To open **Next Codes for Freelancer** window click **Next Codes** button in this freelancer's profile.

6.1.2 Application Tab of Freelancer Window

Application tab of the **Freelancer** window can be used to enter recruiting information of this freelancer, employment history and other HR data. Project managers can also check this tab to view any additional information on freelancer before assigning him or her to a freelance job.

Click **Application Notes** button to enter general notes about this freelancer's application.

Application Tracker can be used to enter records about certain events (i.e. interviews, and so on.) which occurred on certain date. Application tracker can contain any number of records, each having a **Date**, **Subject** (250 characters maximum) and **Description** (plain text note with no length limitation). **Date** and **Subject** fields of a record cannot be empty.

Records in application tracker can be sorted by **Date** or by **Subject**.

6.1.3 Prices Tab of Freelancer Window

Each freelancer in *Projetex* can have a set of prices individual to this particular freelancer. These prices can be assigned on the **Prices** tab of **Freelancer** window. Individual freelancer price list is maintained in *freelancer's currency*. Only one price per group of services, service and unit combination can exist in individual price-list.

You can print freelancer's price list or save it in a text file by selecting the template and clicking **Save**, **Save & Open** or **Print** buttons at the bottom of **Prices** tab of **Freelancer** window.

To configure price list templates on the **Settings** menu click **Corporate** command, then click **Templates**. Templates for prices are stored in *D:*

\BusinessServer\Templates\EXPERTS\FREELANCE\Prices folder.

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

6.1.4 Quotes Tab of Freelancer Window

Quotes tab of **Freelancer** window can be used to account quotes of this freelancer. To view the list of freelancer's quotes, open **Freelancer** window and switch to **Quotes** tab.

Freelancer Quote Buttons

Quote management buttons are located on the left side of **Quotes** tab of **Freelancer** window.

New Quote button opens **New Freelance Quote** window, where details of a new freelancer quote can be added.

Edit button opens **Edit Freelancer Quote** window, where details of currently selected quote can be edited.

Delete button deletes currently selected quote.

Quote Filters

Status drop-down list can be used to display only the quotes with a certain status.

Freelancer Quote Status

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

Blue — for unknown quote status.

Green — for accepted quote status.

Red — for rejected quote status.

 **Note:** You can change colors on the **Colors: Status tab** of the **Current User Settings**.

6.1.5 Freelance Jobs Tab of Freelancer Window

Freelance Jobs tab displays all jobs of the currently selected freelancer. New jobs cannot be created from this tab, however, existing ones can be edited.

Filtering Freelance Jobs

Using **Status** drop-down list you can choose to filter only jobs with a particular status, like *vacant*, *not completed*, *due today* and so on.

Using **PO Issued** drop-down list you can set *Projetex* to display only jobs for which purchase order has been or has not been issued, or free jobs.

Freelance Jobs statuses

Freelance jobs are displayed in different colors, depending on their completion statuses:

Black — the freelance job is *completed*.

Green — the freelance job is *not completed* yet, *deadline in the future*.

Blue — the freelance job is *not completed* and *due today*.

Red — the freelance job is *not completed* and *overdue*.

 **Note:** You can change colors on the **Colors: Status tab** of the **Current User Settings**.

Also, if a job has any status other than normal, it will be highlighted either in red or in green:

Job Name	
Engine shceme ER-34221	This Job has On Hold status
Veni Vidi Vici	This Job has Planned status
Nam tempus	

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

6.1.6 POs Tab of Freelancer Window

Use **Purchase Orders** tab to view purchase orders issued to currently selected freelancer. New purchase orders cannot be created from this tab, however, existing ones can be edited.

PO Statuses

Purchase order statuses change depending on your payment terms to freelancers and your payment to freelancers linked to purchase orders.

Green — purchase order is *outstanding* and is expected *to be paid soon*.

Blue — purchase order is *outstanding* and is expected *to be paid today*.

Red — purchase order is *outstanding* and its *payment is overdue*.

Black — purchase order has been *settled* (paid).

 **Note:** You can change colors on the **Colors: Status tab** of the **Current User Settings**.

Projetex automatically assigns statuses to POs depending on each freelancer's payment terms.

Filtering POs

Use **Status** drop-down list to filter out only those **Purchase Orders** which have selected status.

Use **Approved** drop-down list to filter out those **POs** which have or have not been approved by project managers.

 **Note:** **POs** can be created and deleted in **POs** tab of **Project** window.

6.1.7 Payments Tab of Freelancer Window

Payments tab of the **Freelancer** window displays records of payments to currently selected freelancer.

Payments to freelancers can be linked to purchase orders, fully or partially. If the sum of linked payment values, matches *PO total*, this purchase order is considered "settled". Payments are also added to company expenses on **Balance** tabs.

By default payments values are displayed in freelancer currency. Right-click the table and click **Customize columns** option to configure which payment data must be displayed.

Payment Filter

Use **Status** drop-down list to display only payments which are still to be linked with POs, or only those, which whole amounts have been linked with POs.

6.1.8 Balance Tab of Freelancer Window

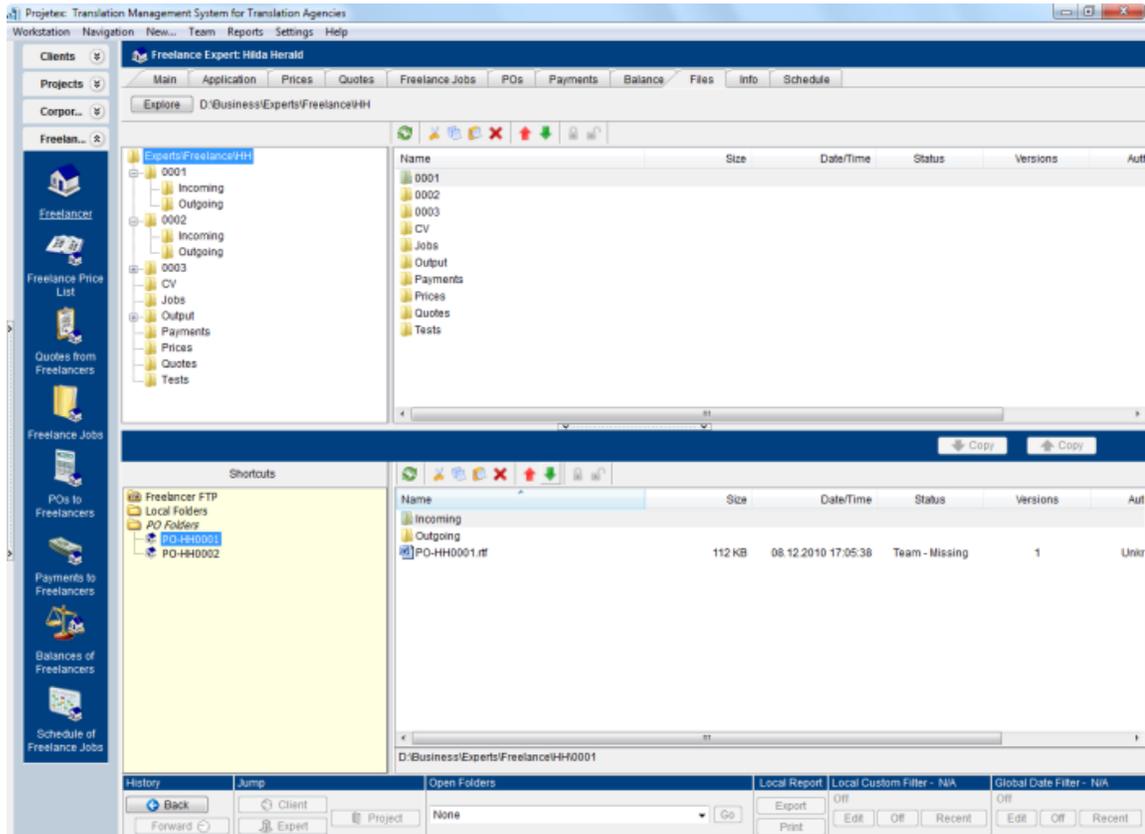
Balance tab of the **Freelancer** window displays a brief summary of selected freelancer's accounts.

This balance includes *total of purchase orders*, issued to this freelancer, *total of payments*, paid to this freelancer, and *account balance* (total POs minus total payments).

Pie diagram represents the share of this freelancer in overall purchase orders issued to all freelancers.

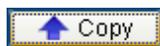
6.1.9 Files Tab of Freelancer Window

Files tab of the **Freelance Expert** window can be used to create an expert folder with one click, create, view and search for files and folders related to this expert. This tab can also be used to access remote FTP folders.



Window contains two horizontal panes. Upper pane shows the folder tree for selected freelancer's folder and content of the currently selected subfolder. Pane underneath allows to open shortcuts. Clicking any of the **Shortcuts** will create a second file view field to the right, and open appropriate folder there. This allows to simultaneously work with two opened folders in the same window.

Files between freelancer folder and external resources (local folders, FTP) can be exchanged through **Copy** buttons.



- is used to copy file from path currently opened in Shortcuts pane to freelancer folder.



- is used to copy file from freelancer folder to path currently opened in Shortcuts pane.

Context menu contains the following specific file operations:

Open command opens the file in the appropriate application

Upload command uploads the file from local *Business* folder to *BusinessServer* folder on Projex Server Administrator PC.

Download can be used to download the file *BusinessServer* folder on Projex Server Administrator PC to *Business* folder on Workstation PC.

Download version opens window that contains information about all versions of particular files.

Each file can have one of the following statuses:

Current - the files stored in *BusinessServer* folder on server and in local storage are identical.

Modified - local copy of the file has been modified, the file on server has not been updated.

Out of date - file on the server has been modified, local copy has not been updated.

Missing - file exists on the server, but has not been downloaded to local PC yet (or have been deleted locally).

Not in view - file exists locally, but has not been uploaded to server yet (or have been deleted on server).

6.1.10 Info Tab of Freelancer Window

Info tab of the **Freelancer** window can be used to enter any additional information regarding the selected freelance expert in plain text format. These notes will be available for all project managers.

Each note has the following attributes:

Subject — can be maximum 100 characters long.

Category — to add more categories of notes on the **Settings** menu click **Current user** command, then click **Categories**.

Information — plain text note, any number of characters long.

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

6.1.11 Schedule Tab of Freelancer Window

Schedule tab of the **Freelancer** window displays schedules of this expert's *freelance jobs*.

Double-click any schedule representing the freelance job to open this job for editing.

Settings for Schedule view

The following settings for the schedule page are available:

Selected period: - enter start and finish date of date range using calendars. Any changes to this setting will take into effect only after clicking **Apply** button.

Column scale - changes the scale of a schedule. **1 hour**, **8 hours**, **12 hours** and **1 day** options are allowed.

Column width drop-down menu allows to configure the width of columns to **Short**, **Normal** or **Large**.

Sort by option sorts the items in the schedule either by **Job name** or **Job assigned** date.

Job schedules colors

Just like the jobs they represent, job schedule bars can have different colors, depending on the statuses of respective jobs:

Green — freelance job is *not completed* yet, but its *deadline is in the future*.

Blue — freelance job is *not completed* and *due today*.

Red — freelance job is *not completed* and *overdue* (its deadline is in the past).

Grey — freelance job is *completed*.

 **Note:** To customize status colors on the **Settings** menu select **Current User** section. Click **Colors: Statuses** section of **User Settings** window.

Filtering Schedules of Corporate Jobs

Use **Job Status** filter to display schedules of freelance jobs only with certain status, such as *vacant* (no expert assigned), *overdue*, *completed* and so on.

Use **Project Manager** filter to display schedules of freelance jobs only led by certain project managers.

6.2 Freelance Price List

Freelance Price List window contains your general *price list* for services offered by your freelancers. These prices can be used when creating freelance quotes, freelance jobs and *POs* for any freelancer in your database.

Prices from this window can be copied to any individual freelancer price list.

You can *print* your general freelance services price list or save it in a text file by selecting the template and clicking **Save**, **Save & Open** or **Print** buttons at the bottom of the window.

To configure price list templates on the **Settings** menu click **Corporate** command, then click **Templates** section. Templates for prices are stored in *D:*
\BusinessServer\Templates\EXPERTS\FREELANCE\Prices folder.

6.3 Quotes from Freelancers Window

Quotes from Freelancers window provides an overview of all freelancer quotes. The options available for this window are the same as those for **Quotes** tab of **Freelancer** window. The major differences are:

- **Quotes from Freelancers** window displays all quotes from freelancers.
- New quote from freelancer cannot be created using this window.
- Existing quotes from freelancers cannot be deleted using this window.

Quote Filters

Status filter drop-down list can be used to display only quotes with a certain status.

A quote can have one of the following statuses — *unknown*, *accepted* and *rejected*. Depending on its current status, the quote will be marked with different color in the quotes list:

Blue — for unknown quote status.

Green — for accepted quote status.

Red — for rejected quote status.

 **Note:** You can change colors on the **Colors: Status tab** of the **Current User Settings**.

6.4 Freelance Jobs Window

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

- **Freelance Jobs** window displays all freelance jobs of all projects.
- New freelance jobs cannot be created using this window.
- Existing freelance jobs cannot be deleted using this window.

Freelance Jobs Filters

Using **Status** drop-down list you can select to view only jobs with a particular status: *vacant*, *not completed*, *due today* and so on.

Using **PO Issued** drop-down list you can select to view only jobs for which purchase order was issued or these, for which was not issued, or free jobs.

Freelance jobs may also be filtered by *Project Manager* responsible for them.

Freelance Jobs statuses

Color of freelance jobs in the list is determined by their status. By default these are:

Green — freelance job is *not completed* yet, *deadline in the future*.

Blue — freelance job is *not completed* and *due today*.

Red — freelance job is *not completed* and *overdue*.

Black — freelance job is *completed*.

 **Note:** You can change colors on **Colors: Status** tab of the **Current User Settings**.

Also, if a job has any status other than Normal, it will be highlighted either in red or in green:

Job Name	
Engine shceme ER-34221	This Job has On Hold status
Veni Vidi Vici	This Job has Planned status
Nam tempus	

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

6.5 POs to Freelancers Window

POs to Freelancers window provides a general list of all purchase orders issued to all freelancers in the database. Use this window to identify currently unpaid POs, obtain a total of balance due according to all purchase orders issued, as well as to quickly issue a large amount of POs.

The options available for this window are the same as those for **POs** tab of **Freelancer** window. The major differences are:

- **POs to Freelancers** window displays all POs for all freelancers.
- New POs cannot be created using this window.
- Existing POs cannot be deleted using this window.

To create a new purchase order, open **Main** tab of **Projects** window, select required project, and click **POs** tab.

To quickly create a large number of purchase orders, click **Mass POs** button.

PO Statuses

Purchase order statuses change depending on your payment terms to freelancers and your payment to freelancers linked to purchase orders.

Green — purchase order is *outstanding* and is expected *to be paid soon*.

Blue — purchase order is *outstanding* and is expected *to be paid today*.

Red — purchase order is *outstanding* and its *payment is overdue*.

Black — purchase order has been *settled* (paid).

 **Note:** You can change colors on the **Colors: Status tab** of the **Current User Settings**.

Projex automatically assigns statuses to POs depending on each freelancer's payment terms.

Filtering POs

Use **Status** drop-down list to filter out only those **Purchase Orders** which have selected status.

Use **Approved** drop-down list to filter out those **POs** which have or have not been approved by project managers.

POs can also be filtered by *Project Manager* responsible for them.

6.6 Payments to Freelancers Window

Payments to Freelancers window displays all *payments* received from all *freelancers*. This window can be used to edit payments, create **Mass payments to freelancers** and calculate totals of all *Payments to Freelancers* in base currency.

Use **Status** filter drop-down list to display only payments with a particular status. Use this filter to view either the payments which are still to be linked with invoices, or only those, which whole amounts have been linked to *purchase orders*.

6.7 Balances of Freelancers Window

Balance of Freelancers window presents a simplified balance sheet of your freelancers based on your payments made to freelancers and freelancer purchase orders. Accounting staff can use this window to identify freelancer's account which require attention.

Accounts can be viewed both in freelancers' currencies and your base currency: use **View** drop-down list to select a currency in which records should be displayed.

Alternatively you can right-click the table and use **Customize columns** option to add freelancer currency columns to view.

 **Note:** To view global balance, select **Base Currency** option in **View** drop-down list.

6.8 Schedule of Freelance Jobs Window

Schedule of Freelance Jobs window displays job schedules of all the freelancers in the database. This particular schedule can be used to get the picture of all freelance jobs for the specified period. At a glance you see what jobs need immediate attention.

To open **Schedule of Freelance Jobs** window click **Schedule of Freelance Jobs** icon in the **Freelancers** section of **Navigation Panel**.

Settings for Schedule view

The following settings for the schedule page are available:

Selected period: - enter start and finish date of date range using calendars. Any changes made to these settings will take into effect only after clicking **Apply** button.

Column scale - changes a scale of the schedule. **1 hour**, **8 hours**, **12 hours** and **1 day** options are allowed.

Column width drop-down menu allows to configure a width of the column to **Short**, **Normal** or **Large**.

Sort by option sorts the items in the schedule either by **Expert name** or **Job assigned** date.

Job schedules colors

Just like the jobs they represent, job schedule bars can have different colors, depending on the statuses of respective jobs:

Green — freelance job is *not completed* yet, but its *deadline is in the future*.

Blue — freelance job is *not completed* and *due today*.

Red — freelance job is *not completed* and *overdue* (its deadline is in the past).

Grey — freelance job is *completed*.

Filtering schedules of freelance jobs

Use **Job Status** filter to display schedules of freelance jobs only with certain status,

Use **Project Manager** filter to display schedules of freelance jobs only led by certain project managers.