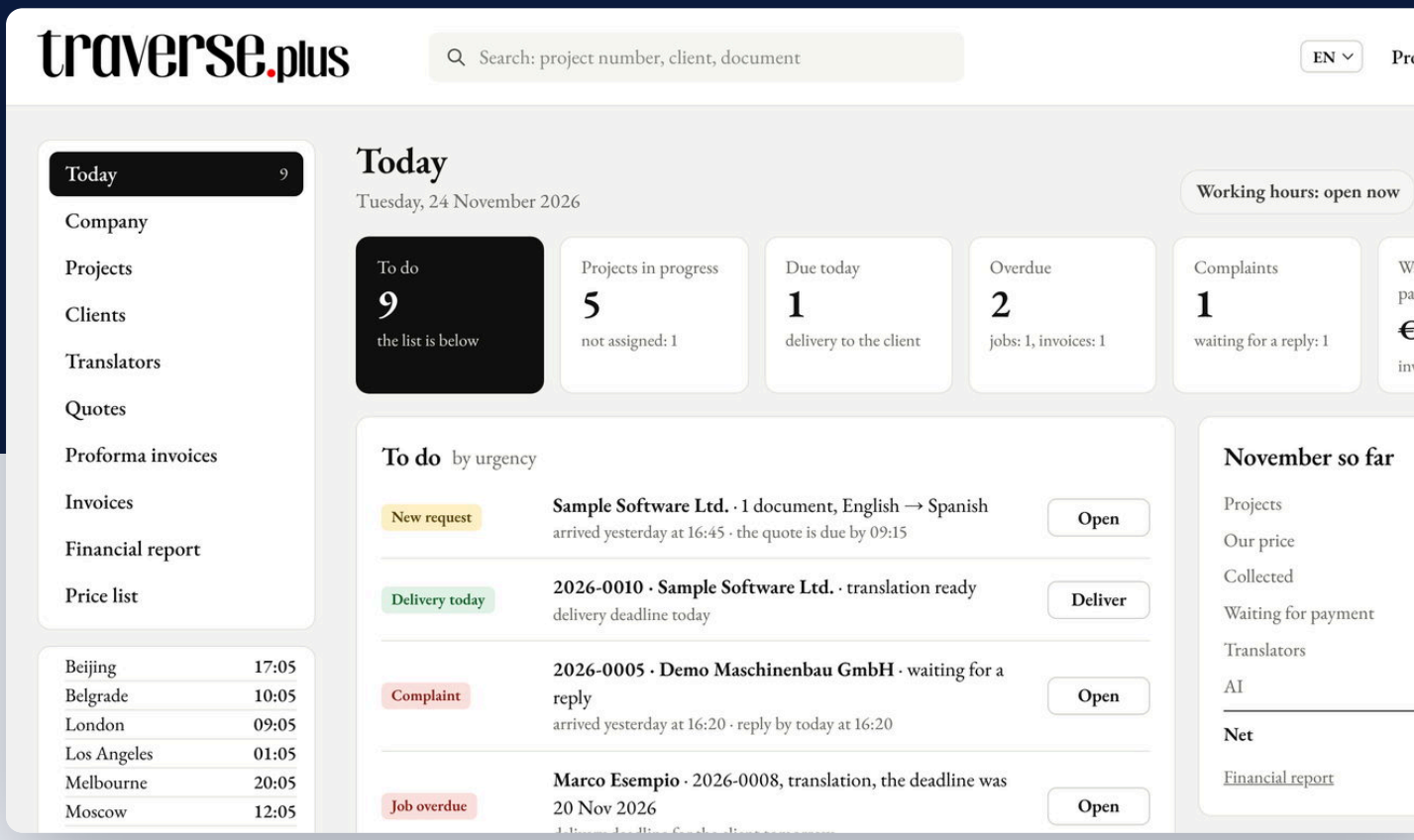
traverse.plus

User manual

The central system, the client portal and the translator portal: installation, set-up and daily work.



Edition November 2026
For program version 38 and later

Traverse Limited
traversetranslations.com

Contents

1 What TRAVERSE.PLUS is ... 3
- 1.1 Three parts, one system ... 3
- 1.2 How a project moves ... 3
- 1.3 About this manual ... 4

2 Installation ... 5
- 2.1 What you need ... 5
- 2.2 What is in the package ... 5
- 2.3 Installing the program ... 6
- 2.4 Connecting your e-mail ... 6
- 2.5 Regular jobs ... 8
- 2.6 Your licence ... 8

3 The central system at a glance ... 9
- 3.1 The window ... 9
- 3.2 Today ... 10
- 3.3 Search ... 11
- 3.4 Your profile ... 11

4 Setting up your company ... 13
- 4.1 Basic details and logo ... 13
- 4.2 Company details on all documents ... 13
- 4.3 Tax ... 14
- 4.4 Payment ... 14
- 4.5 Notes on the quote ... 15
- 4.6 Languages ... 16
- 4.7 Working hours, deadlines and files ... 16
- 4.8 Payouts to translators ... 17
- 4.9 Program addresses ... 17
- 4.10 Staff accounts ... 18
- 4.11 Before real work starts: clear the test data ... 18

5 The price list ... 20
- 5.1 Currencies ... 20
- 5.2 Services ... 20
- 5.3 Prices ... 22
- 5.4 File types ... 22
- 5.5 Statistics: what each row costs ... 23

6 A project, step by step ... 24
- 6.1 The list of projects ... 24
- 6.2 The project page ... 24
- 6.3 A request arrives ... 25
- 6.4 Statistics and the quote ... 26
- 6.5 The client's answer ... 28
- 6.6 Proforma invoice and payment ... 29
- 6.7 Translators ... 30
- 6.8 Delivery ... 33
- 6.9 Complaints ... 33
- 6.10 The invoice ... 34
- 6.11 History ... 35
- 6.12 Finding a document ... 36

7 Clients ... 37
- 7.1 The client's page ... 37
- 7.2 Entering a client yourself ... 38
- 7.3 Importing clients from Excel ... 38

8 Translators ... 40
- 8.1 Finding the right translator ... 40
- 8.2 Adding a translator ... 40
- 8.3 Applications from new translators ... 41
- 8.4 Payout details and statements ... 42

9 The financial report ... 44
- 9.1 Projects and the monthly report ... 44
- 9.2 The annual report ... 45
- 9.3 Payouts to translators ... 45
- 9.4 AI ... 46

10 Reminders ... 47

11 The client portal ... 48
- 11.1 Registration ... 48
- 11.2 Sending a request ... 49
- 11.3 The quote ... 49
- 11.4 The translation, complaints and the invoice ... 50
- 11.5 My requests and company details ... 52

12 The translator portal ... 53
- 12.1 Opening an account and applying ... 53
- 12.2 Job offers ... 54
- 12.3 Jobs ... 55
- 12.4 Statements ... 56

13 Card payment ... 57

14 Looking after the system ... 58
- 14.1 Backups ... 58
- 14.2 New versions ... 59
- 14.3 Where your data is ... 59
- 14.4 Moving to another server ... 60
- 14.5 Data transfer ... 60
- 14.6 The log ... 60
- 14.7 A forgotten password or a lost phone ... 60

15 If something does not work ... 61

16 Where to find what ... 62

1 What TRAVERSE.PLUS is

TRAVERSE.PLUS runs the daily work of a translation company, from the client's first request to the translator's payout. It is installed on your own server, carries your logo, and keeps all its data with you.

1.1 Three parts, one system

The program has three parts. Each part has its own address and its own sign-in, and all three work on the same data, so nothing is typed twice.

Central system

for you and your staff

Projects, quotes, proforma invoices and invoices, clients, translators, the price list and the financial reports. Everything is run from here.

Client portal

for your clients

Clients register, send documents for translation, accept or decline quotes, pay, download the finished translation and send a complaint if something is not right.

Translator portal

for your translators

Translators apply to work with you, accept job offers, download files and purchase orders, hand in finished work and see their monthly statements.

The program is one. It is installed once, and it knows by the address which part to show.

1.2 How a project moves

Every project follows the same path. The program does the routine steps by itself and tells you when something needs your decision.

1	2	3	4	5	6	7
Request	**Quote**	**Acceptance**	**Translators**	**Delivery**	**Invoice**	**Payout**
The client sends documents, languages, service and deadline.	You add the statistics; the price list fills in the quote.	The client accepts the quote on the portal.	You assign the jobs or offer them to several translators.	The translator hands in; you deliver to the client.	The program issues it and follows the payment.	Each translator gets a monthly statement.

Whether the client pays before the work starts or after delivery is your choice; you set it once, on the **Company** page. Chapter 6 follows one project through all of these steps.

1.3 About this manual

- Words in **bold** are what you see on the screen: a page, a button or a field.
- **Company → Staff** means: open the page **Company**, then click **Staff**.
- The pictures show an invented company, Sample Translations Ltd., with invented clients and translators. Your own system looks the same, with your logo and your data.
- The program works in English, German and Serbian. The pictures were taken in English.

If you are installing the program, start with chapter 2. If it is already installed and you are a project manager, start with chapter 3.

> **Questions.** Write to office@traversetranslations.com. For a question about your installation, include your licence number; it is at the bottom of every page of the central system.

TRAVERSE.PLUS is developed and sold by Traverse Limited, Nikole Spasića 3/1, 11000 Belgrade, Serbia.

This manual describes program version 38 and later. Pages may look slightly different in newer versions.

2 Installation

You receive the program as one ZIP file. Installation means extracting it on your web hosting, opening the first account and connecting your e-mail. No database server is needed.

2.1 What you need

- **Web hosting with PHP 8.1 or newer** and the PHP extensions `pdo_sqlite`, `mbstring` and `zlib`. Ordinary shared hosting is enough.
- **Three addresses with HTTPS** that lead to the same folder on the server, one for each part of the program. They can be domains or subdomains, for example `portal.yourcompany.com`, `clients.yourcompany.com` and `translators.yourcompany.com`.
- **An e-mail account** from which the program sends messages (SMTP).

The program keeps its own database file, so you do not create a database in the hosting panel.

> **Your three addresses are part of the licence.** You tell us the three addresses before delivery. They are written into your licence file, and the program works only on them. See section 2.6.

2.2 What is in the package

The ZIP file holds the program, your licence and a short README file. After you extract it, the folder contains:

`index.php`	The entry point of the program.
`.htaccess`, `.user.ini`	Settings for the web server and for PHP. Their names start with a dot, so some file managers hide them until you turn on “show hidden files”.
`licence.php`	Your licence. Do not edit it: an edited licence is not valid.
`README.txt`	The installation steps in short form.
`app`, `static`	The folders with the program itself.

2.3 Installing the program

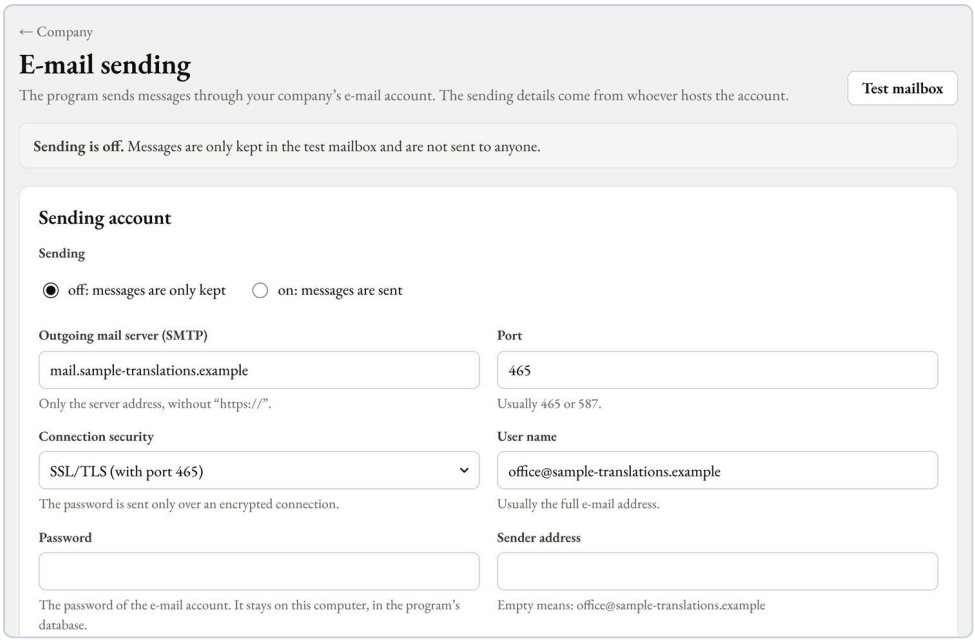
1. **Create the site for the central system.** In your hosting panel create a site for the central system address from your licence. Choose PHP 8.1 or newer.
2. **Upload and extract the files.** Upload the ZIP file to the web folder of that site (usually `public_html`) and extract it there. After that you can delete the ZIP file.
3. **Open the first account.** Open the central system address in your browser. The program asks for your company name, your full name, your e-mail address, a password of at least 10 characters, and a code. The code is in the file `PRVI-KOD.txt` on the server; the page says in which folder. Open that file in the file manager of your hosting panel (the folder name can start with a dot). The code proves that the person opening the first account has access to the server. Once the account is open, the file disappears.
4. **Add the addresses for clients and translators.** These are not new sites. They are additional names of the same site; hosting panels call this a "parked domain", an "alias" or a "domain pointing to the same folder". Add both addresses from your licence to the site from step 1.
5. **Check.** Open the client portal address. You should see its sign-in page. Do the same with the translator portal address.

The first account is an administrator account. You add accounts for your colleagues later, on **Company → Staff**.

> **If you see an error instead of the page for the first account,** the reason is written below it. Usually the PHP version is too old or one of the three PHP extensions is turned off; both are changed in the hosting panel.

2.4 Connecting your e-mail

The program sends its messages through your company's e-mail account: quotes, invoices, job offers, reminders and all notifications. Open **Company → E-mail sending**.



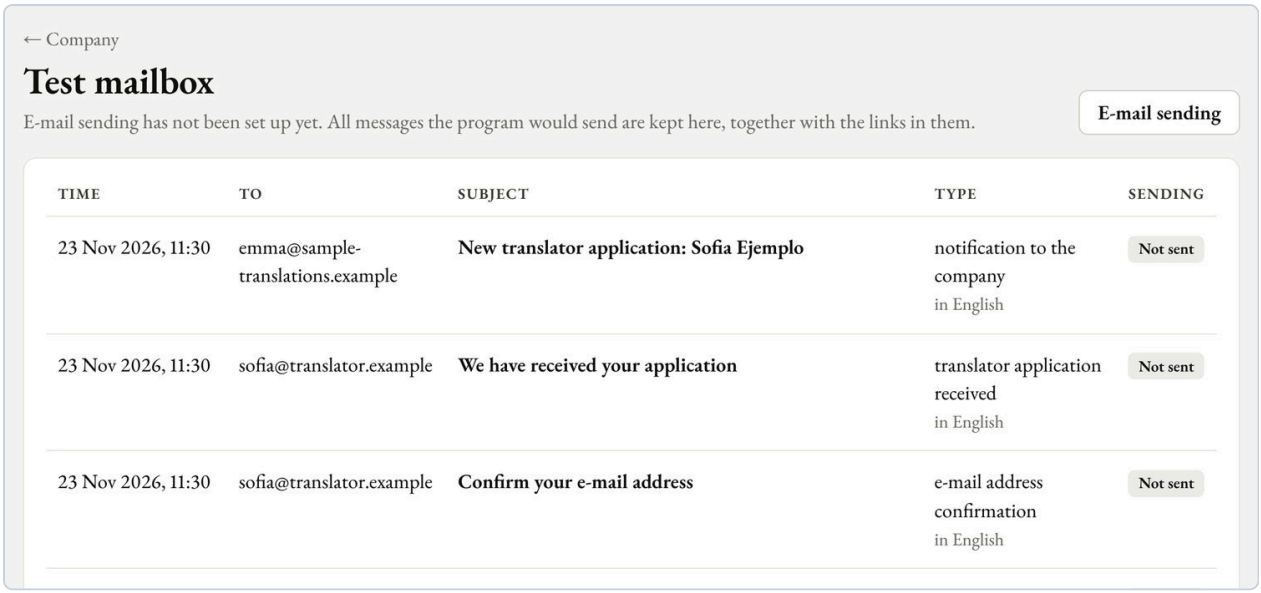
E-mail sending. The details come from whoever hosts your e-mail account.

Outgoing mail server (SMTP)	Only the server address, without "https://". For an account on your own domain it is usually `mail.yourdomain.com`.
Port and Connection security	Usually port 465 with **SSL/TLS**, or port 587 with **STARTTLS**.
User name and Password	The user name is usually the full e-mail address. With some accounts, for example Gmail, the regular password does not work: you create a separate "app password" in the account.
Sender address and Sender name	Optional. If you leave them empty, the program uses your e-mail address for clients and your company name.

1. Enter the details and click **Save and send test message**. This works while sending is still off, so you can check the details first.
2. When the test message arrives, choose **on: messages are sent** and click **Save**.

The test mailbox

Until sending is turned on, nobody receives anything. Every message the program would send is kept in **Company → Test mailbox**, together with the links in it. This lets you try the whole system first: register a test client, send a request, accept the quote, and read each message exactly as the client or the translator would get it.



The test mailbox keeps every message while e-mail sending is off.

2.5 Regular jobs

Some things have to happen on time even when nobody is using the program: reminders, monthly statements to translators, the nightly backup, deleting expired files, cancelling unpaid proforma invoices. For this the server runs the program every few minutes; hosting panels call it a *cron job*.

1. Open the **Company** page and scroll to the card **Regular jobs (cron)** at the bottom. It shows the exact command for your server.
2. In your hosting panel add a cron job with that command, to run every 5 minutes.
3. Open the **Company** page again after a few minutes. The card now says **Cron is working** and when the jobs last ran.

Without a cron job the program still does all of this, but only at the moment somebody opens one of its pages.

2.6 Your licence

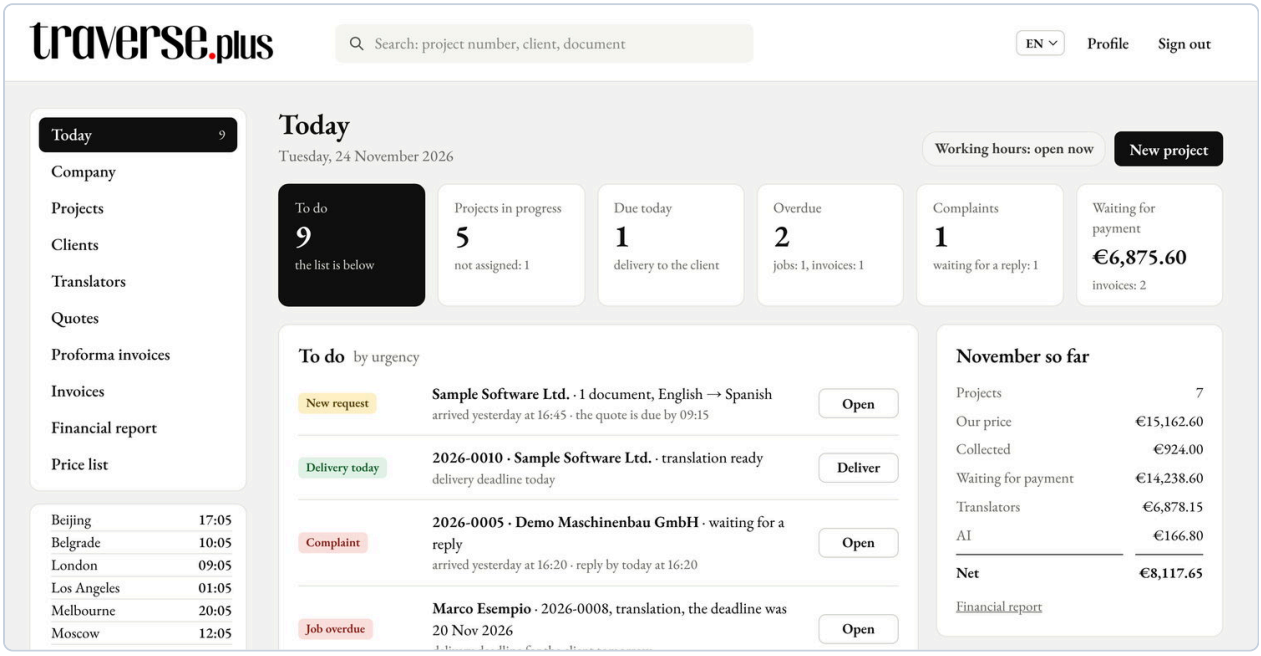
On the **Company** page the card **Licence** shows the licensed company, the licence number and the three addresses. The licence number is also at the bottom of every page. The licence is perpetual and has no limit on the number of staff accounts, clients, translators or projects.

- The program works only on the three addresses in the licence. On any other address it shows the message **This copy is not licensed for this address**.
- If you want to move the program to another address, ask us for a new licence file and put it in the program folder in place of the old `licence.php`. The program and your data stay as they are.
- If `licence.php` was deleted or changed, the program shows **This copy has no valid licence**. Restore the file from the package you received.

3 The central system at a glance

The central system is where you and your staff work. This chapter shows what is where; the following chapters go through each page.

3.1 The window



The central system. The menu is on the left; search, language and your profile are at the top.

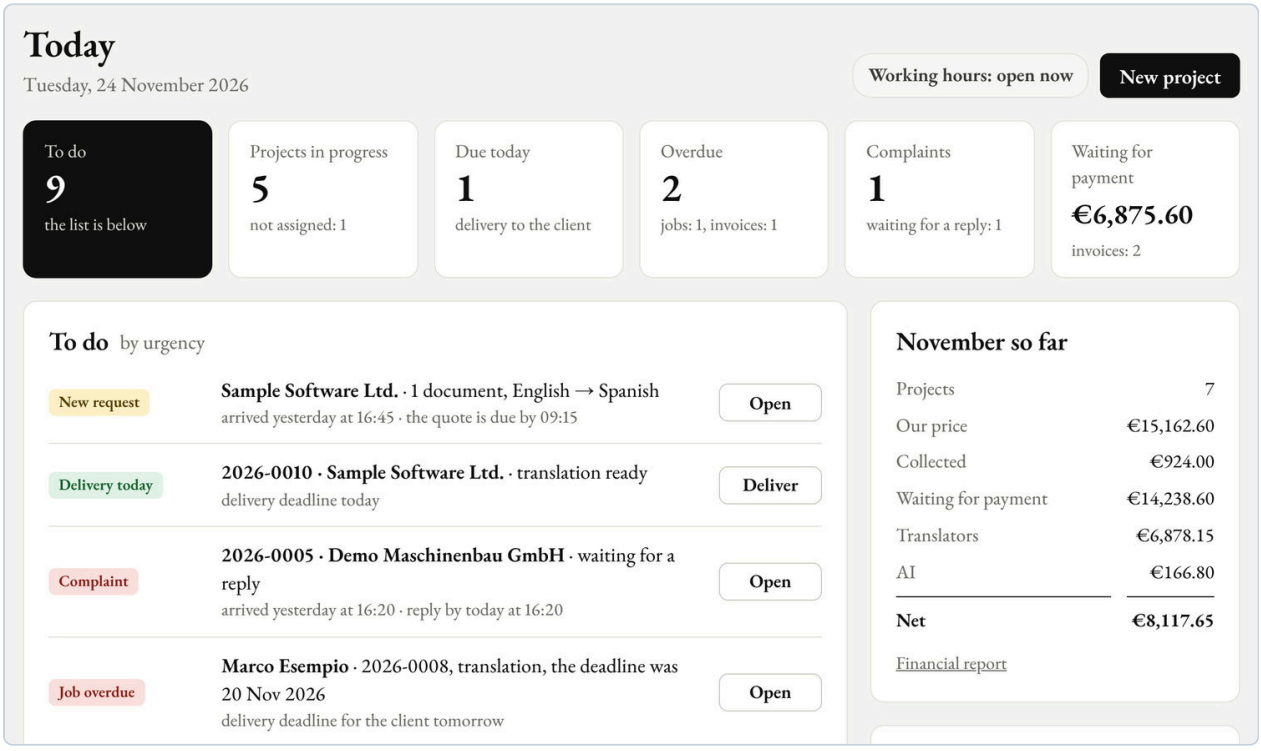
Logo	Top left. Your own logo appears here once you add it on the **Company** page.
Search	Finds a project by its number, a client by name, or a document by its file name. See section 3.3.
Language	Top right. The program works in English, German and Serbian; everyone chooses their own language, and the program remembers it.
Profile, Sign out	Top right. **Profile** is where you change your password and turn on two-step sign-in.
Menu	On the left: the ten pages described below. The number next to **Today** is the number of things waiting for you.
Clocks	Below the menu: the current time in a number of cities, for working with clients and translators in other time zones.

The pages in the menu

Today	What needs doing now, deadlines, and the month so far.
Company	Your company details and all settings. Only administrators can open it.
Projects	Every request and every project, from the first message to the invoice.
Clients	Companies that registered on the portal and those you entered yourself.
Translators	Your translators and revisers, their prices, ratings and payouts; applications from new translators.
Quotes, Proforma invoices, Invoices	Lists of all documents the program has issued, each with its PDF.
Financial report	Income, translator costs and net amount by project, month and year; payouts to translators.
Price list	Your services, prices, currencies, and what each row of the statistics costs.

3.2 Today

Today is the page you see when you sign in. It answers one question: what has to be done now?



Today: six figures at the top, then the list of things to do, sorted by urgency.

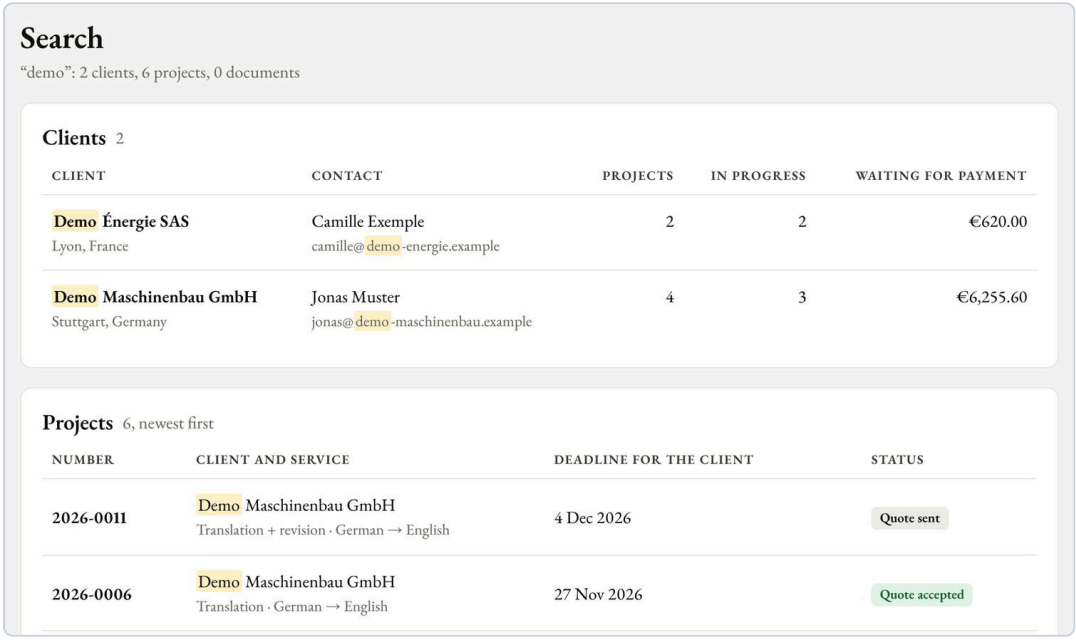
- **The six tiles** at the top count things to do, projects in progress, deliveries due today, what is overdue, complaints, and money you are waiting for.

- **To do** lists everything that is waiting for you, the most urgent first: a new request, a delivery due today, a complaint, an overdue job or invoice, a translator application, a payout that falls due. The button on the right takes you straight to the place where you do it.
- The card for the month so far, for example **November so far**, shows this month's projects, your price, what has been collected, what translators and AI cost, and the net amount.
- **Since yesterday** lists what happened while you were away: new requests, complaints, applications, backups.
- **Delivery deadlines** shows the next ten days: which project is due when, who is working on it, and whether the translator is on time.

If you turn on the morning overview on **Company → Reminders**, the same list arrives by e-mail every working day.

3.3 Search

Type a project number, part of a client's name or a file name into the search box at the top and press Enter. The results are grouped into clients, projects and documents, and the newest projects come first.



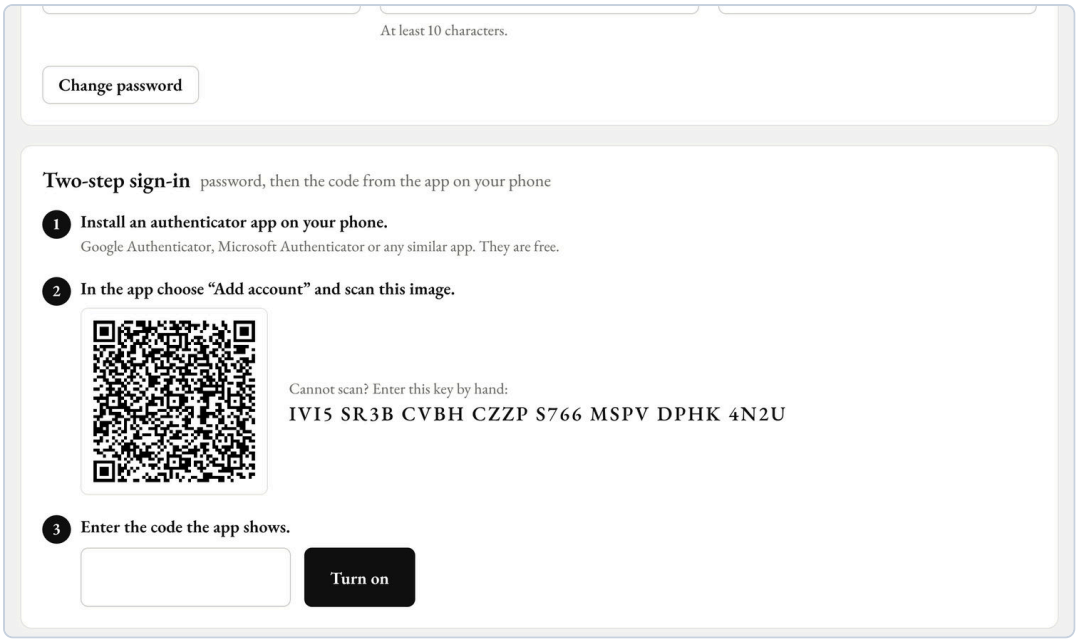
Search results for "demo".

3.4 Your profile

Click **Profile** at the top right. Here you change your password and turn on two-step sign-in.

Two-step sign-in

With two-step sign-in the program asks for your password and then for a code from an app on your phone. Somebody who learns your password still cannot sign in without your phone.



Turning on two-step sign-in takes three steps.

1. Install an authenticator app on your phone, for example Google Authenticator or Microsoft Authenticator.
2. In the app choose "Add account" and scan the image on the page.
3. Enter the code the app shows and click **Turn on**.

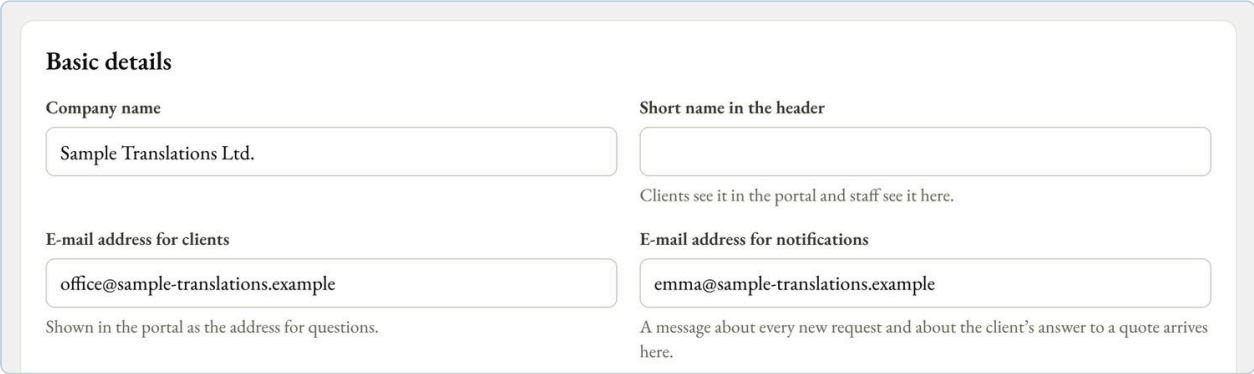
The program then gives you **backup codes**. Keep them somewhere safe: each one replaces the code from the app once, for the day your phone is not at hand.

4 Setting up your company

Everything the program needs to know about your company is on one page, **Company**. Fill it in from top to bottom before the first real project. Your details then appear on every quote, proforma invoice, invoice and purchase order.

The page is long, so this chapter goes through it card by card. One **Save** button at the end of the form saves all cards down to **Program addresses**; **Payouts to translators** has its own button.

4.1 Basic details and logo



The first card of the Company page.

Company name	Your full company name, as it should appear on documents.
Short name in the header	Shown at the top of the central system and the client portal until you add a logo.
E-mail address for clients	Shown on the client portal as the address for questions.
E-mail address for notifications	The program writes to this address about every new request and every answer to a quote, and sends the reminders meant for you here.
Logo	A PNG image. It replaces the short name in the header and appears on your documents.

4.2 Company details on all documents

These details are printed in the footer of every quote, proforma invoice and invoice: **Registered office**, **Company country**, **VAT / tax number**, **Registration number**, **Phone** and **Website**.

> **Company country decides who is a domestic client.** A client from your country is domestic: tax is added to the price and the invoice gets the domestic number. All other clients are foreign. Until you choose a country, the program treats every client as foreign.

Document numbers

Prefix in the quote number	With the prefix QUO the numbers are QUO-2026-0001, QUO-2026-0002 and so on.
Prefix in the proforma invoice number	Proforma invoices are numbered separately, for example PRO-2026-0001.
Prefix in the domestic and in the foreign invoice number	Domestic and foreign invoices have separate prefixes and separate sequences, for example INV-2026-001 and INT-2026-001.
Next domestic / foreign invoice number	Change it only if you have already issued invoices outside the program this year and want to continue their numbers.
Number of digits in the invoice sequence number	With 3 digits the numbers are written 001, 002 and so on.
When the program issues the invoice by itself	Four choices: **according to when the client pays**, **when the full amount has been paid**, **when the translation has been delivered**, or **never; I issue it with the button**. The first one means: after payment when the client pays in advance, after delivery when the client pays after delivery.
Place of issue of the invoice	Printed on the invoice. Leave it empty if your invoices do not need it.

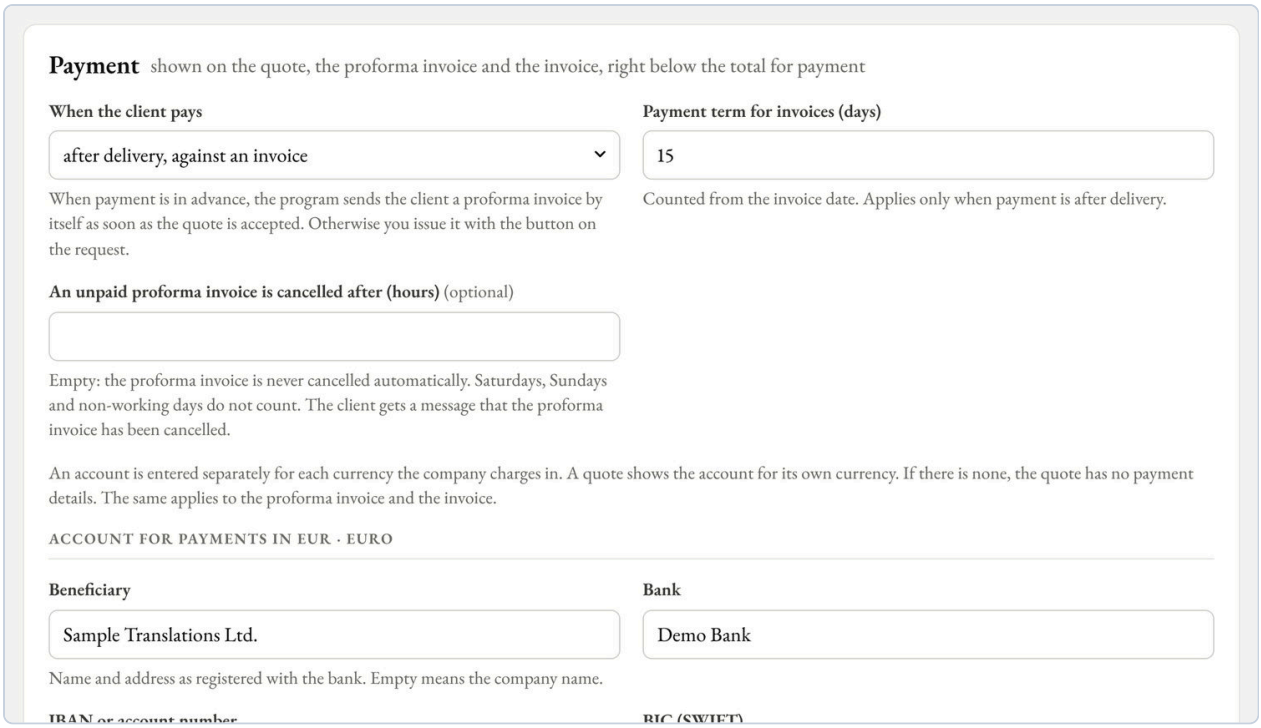
4.3 Tax

In **Tax rates in percent** enter your rates, separated by commas; the first one is the standard rate. If you have two rates, for example 20 and 10, you choose the rate for each service in the price list.

- For a domestic client the program adds the tax by itself on the quote, the proforma invoice and the invoice.
- A foreign client is not charged tax. The tax specification on the documents shows zeros.
- If you leave the field empty, the documents have neither tax nor a tax specification.

4.4 Payment

This card decides how your clients pay and which bank details are printed on your documents, right below the total.



Payment: when the client pays, and an account for each currency.

When the client pays	**in advance**: as soon as the client accepts the quote, the program sends a proforma invoice, and you start the work when it is paid. **after delivery, against an invoice**: work starts when the quote is accepted, and the invoice is due after the number of days you set. **not shown on the quote**: the quote says nothing about payment terms.
Payment term for invoices (days)	Counted from the invoice date. It applies when payment is after delivery.
An unpaid proforma invoice is cancelled after (hours)	Optional. Saturdays, Sundays and non-working days do not count, and the client gets a message that the proforma invoice has been cancelled. Empty means it is never cancelled automatically.

An account for each currency

You enter one bank account for each currency you charge in: **Beneficiary**, **Bank**, **IBAN or account number**, **BIC (SWIFT)** and, if your bank requires them, the bank address and the correspondent bank. A quote in euros shows the euro account, a quote in pounds the pound account. Currencies are added in the price list (section 5.1).

Under **Payment instructions** you can add the rows your bank gives you for international payments, for example "57A: Account with institution" and "59: Beneficiary customer". They are printed in the order you enter them.

4.5 Notes on the quote

Notes are printed at the bottom of the quote, the proforma invoice and the invoice. For each note you choose the documents it appears on (**on all quotes**, or only on quotes in one language) and the clients it applies to (**for all clients**, **for domestic clients only** or **for foreign**

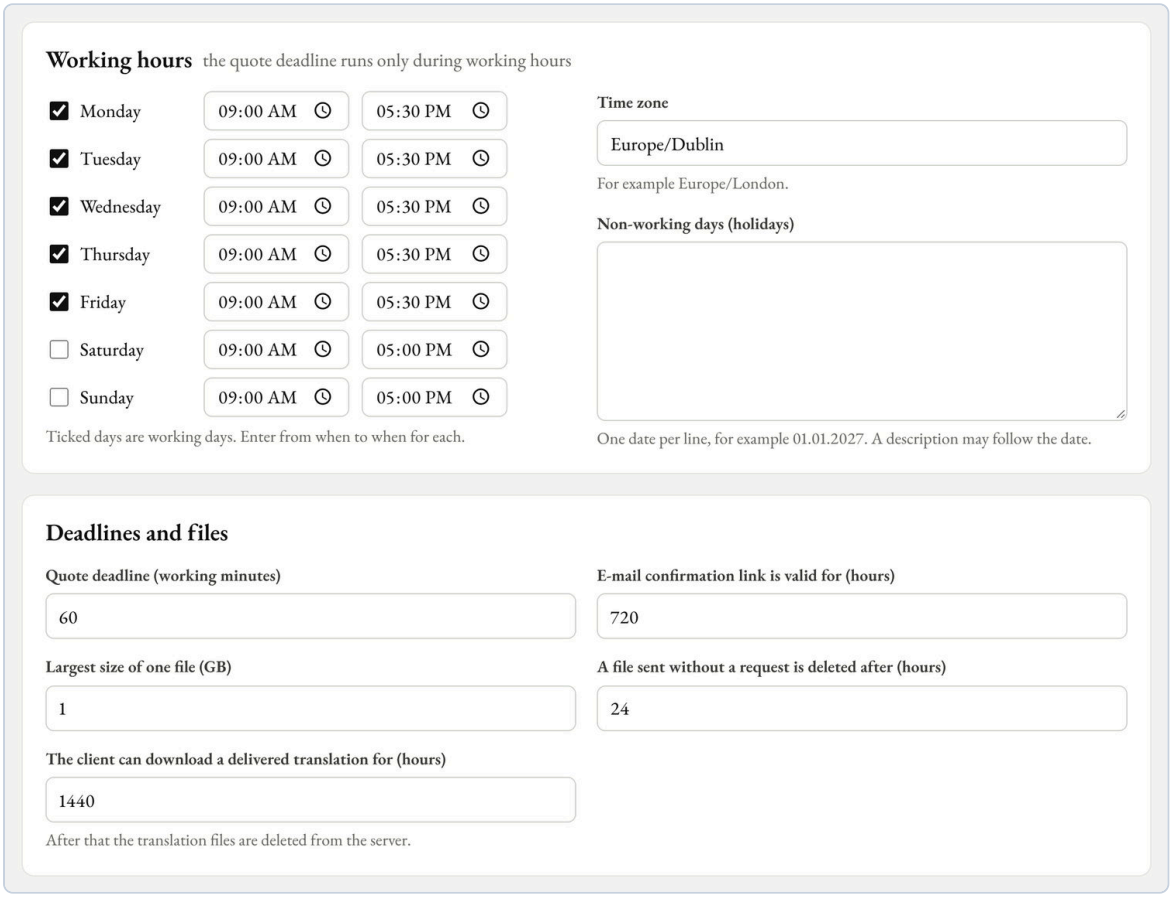
clients only).

A note required by law goes on all quotes, whatever language it is written in. A note saying that tax is not charged goes to foreign clients only.

4.6 Languages

Company language	Notifications to the company arrive in this language and the log is written in it.
Default language of the client portal	The portal opens in it when the language of the client's browser is not one of the three.
Languages the portal offers to clients	Tick the ones you want. The client chooses a language at the top of the portal and receives messages and quotes in it.

4.7 Working hours, deadlines and files



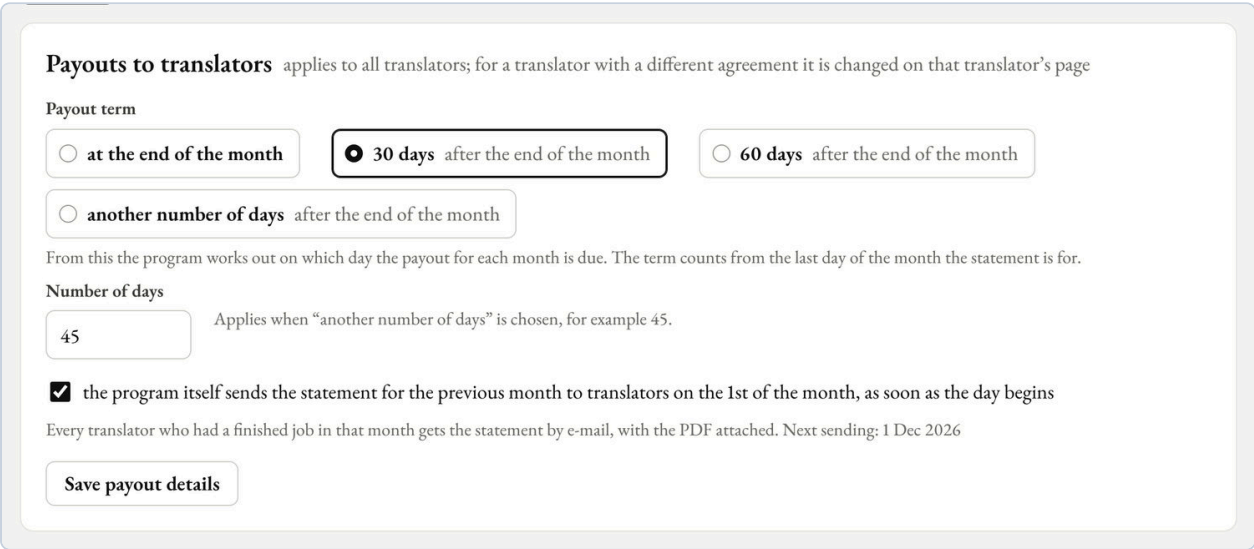
Working hours and the time limits the program keeps for you.

Tick your working days and enter from when to when you work. Enter your **Time zone**, for example Europe/London, and your **Non-working days**, one date per line. The program uses them for the quote deadline and for the cancellation of unpaid proforma invoices, and for reminders if you choose so: these do not run outside working hours.

Quote deadline (working minutes)	How soon you promise a quote. The client is told this when sending a request, and the project page counts down the time you have left.
E-mail confirmation link is valid for (hours)	How long a new client or translator has to confirm their e-mail address.
Largest size of one file (GB)	The largest document a client can send.
A file sent without a request is deleted after (hours)	For files a client uploaded but never sent as a request.
The client can download a delivered translation for (hours)	After that the translation files are deleted from the server.

4.8 Payouts to translators

Choose when you pay your translators: **at the end of the month**, **30 days**, **60 days** or **another number of days** after the end of the month. From this the program works out the day on which the payout for each month falls due. A translator with a different agreement gets their own term on their own page.



The payout term applies to all translators unless you change it for one of them.

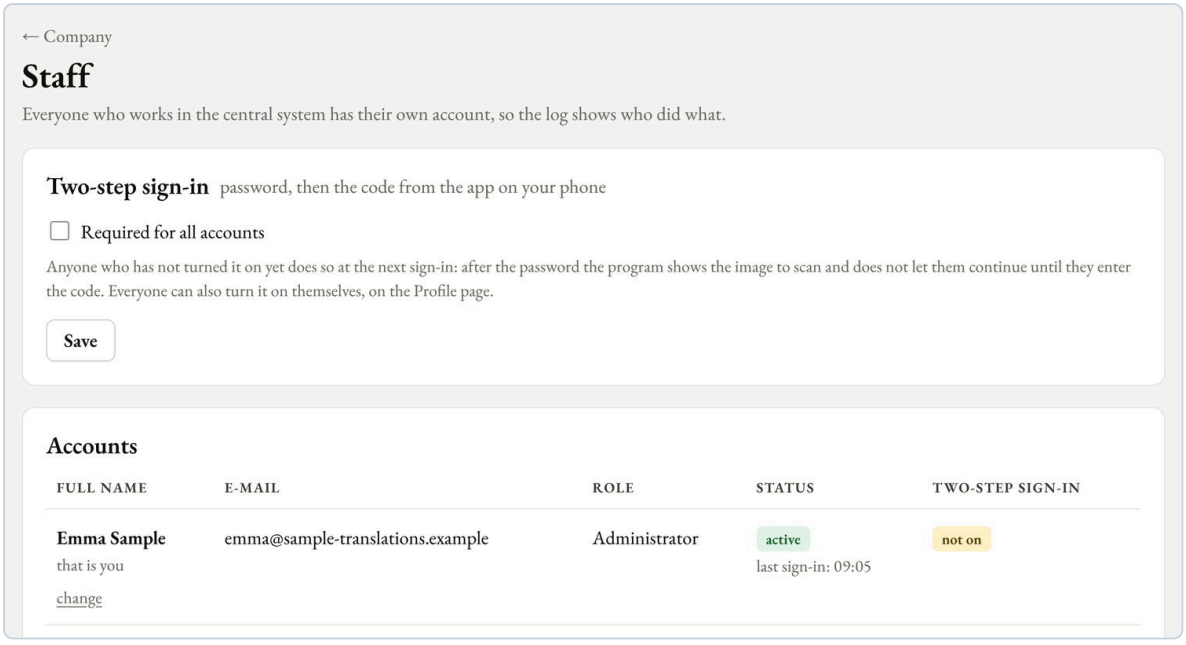
If you tick the last option, the program itself sends every translator the statement for the previous month on the 1st of the month, as soon as the day begins, with the PDF attached. Click **Save payout details**.

4.9 Program addresses

The three addresses in this card come from your licence. You do not need to change them. The program uses them in every link it sends by e-mail.

4.10 Staff accounts

Everyone who works in the central system has their own account, so the log shows who did what. Open **Company → Staff**.



Staff: the rule for two-step sign-in and the list of accounts.

1. Under **New account** enter the full name, the e-mail address, a password of at least 10 characters and the role.
2. Click **Create the account** and tell your colleague the password yourself. They change it under **Profile** after the first sign-in.

Administrator	Can do everything.
Staff	Works with projects, clients, translators, documents and the price list, but cannot open the **Company** page: no company details, e-mail sending, accounts, backups or deleting data.

- An account is never deleted, it is turned off: click **change** next to the account and untick **the account is active**. Documents and the log remember who did what.
- Tick **Required for all accounts** to make two-step sign-in mandatory. Anyone who has not turned it on does so at their next sign-in.
- If a colleague loses their phone, click **change** next to their account and then **Turn off the second step**. They sign in with the password only until they turn it on again on the new phone.

4.11 Before real work starts: clear the test data

It is a good idea to try the whole system with a test client and a test translator first. When you have finished, open the link **Clear test data** at the bottom of the **Company** page.

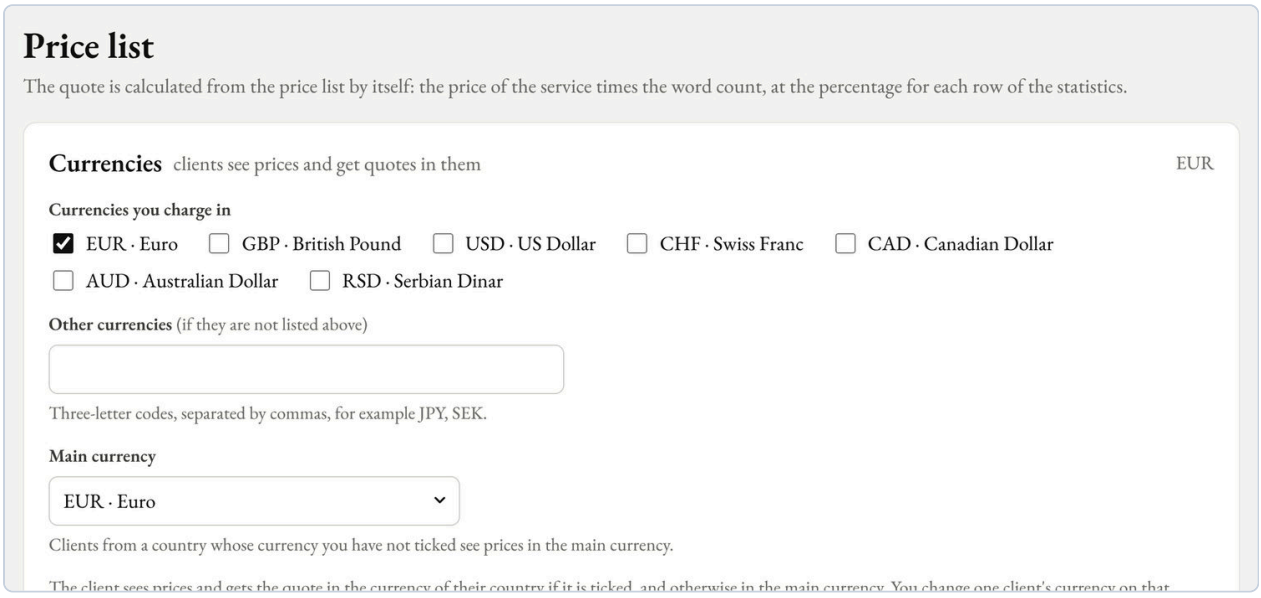
- **Deleted:** projects, quotes, proforma invoices, invoices, payments, deliveries, translator jobs, messages, log entries and the files on the server. The numbers of projects and documents then start again from the beginning.
- **Kept:** company details, logo, payment details, notes, e-mail sending, the whole price list and the staff accounts. Clients and translators also stay, unless you tick that they are to be deleted too.

The program makes a backup first, then asks for your password. If the backup fails, nothing is deleted.

5 The price list

The quote is calculated from the price list by itself: the price of the service, times the word count, at the percentage for each row of the statistics. Set the price list up once and a quote takes one click.

5.1 Currencies



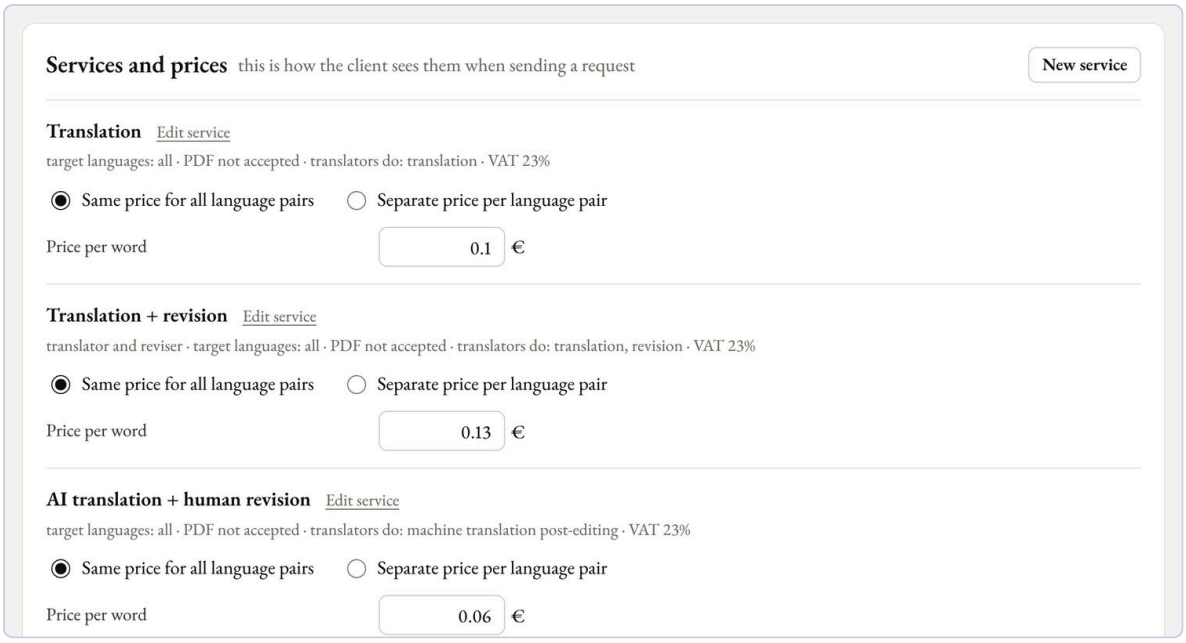
Tick the currencies you charge in and choose the main one.

1. Tick the currencies you charge in. If one is missing, enter its three-letter code under **Other currencies**, for example JPY, SEK.
2. Choose the **Main currency** and click **Save currencies**.

A client sees prices and gets quotes in the currency of their country if you have ticked it, and otherwise in the main currency. You can change the currency of one client on that client's page. You enter the prices for each currency separately; the program does not convert them by exchange rate.

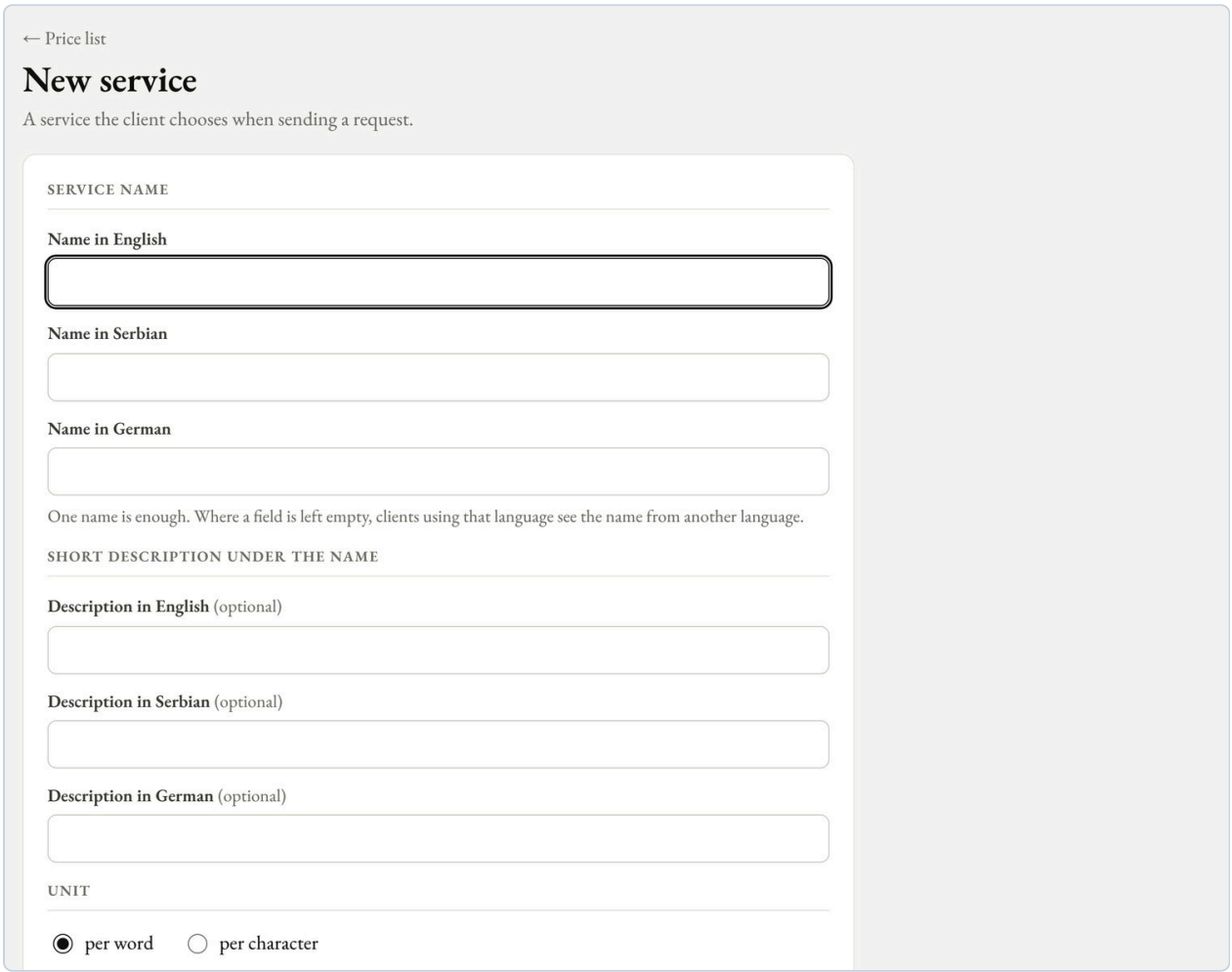
5.2 Services

A service is what the client chooses when sending a request: for example Translation, Translation + revision, or Proofreading. The card **Services and prices** shows them exactly as the client sees them.



Services and prices.

Click **New service** to add one, or **Edit service** to change one.



A new service.

Service name	In English, Serbian and German. One name is enough; clients using another language then see that one.
Short description under the name	Optional, one line.
Unit	**per word** or **per character**. Tick the box below it if the client may also send a PDF with this service.
Tax rate	The rate a domestic client is charged for this service.
What translators and revisers do for this service	Tick the kinds of work: Translation, Revision, Machine translation post-editing, Proofreading, Desktop publishing (DTP). From this the program knows which jobs to create for a project, suggests translators and calculates your margin.
AI cost	Optional. If AI does part of the work, enter what it costs you as a percentage of the service price. The program deducts it in the margin and in the financial report. Only staff can see this.
How it is priced	**Same price for all language pairs** or **Separate price per language pair**.

A service you no longer offer is not deleted: open **Edit service** and click **Disable service**. Requests that have already arrived stay as they are, and the service can be enabled again.

5.3 Prices

- For a service with the **same price for all language pairs**, enter one price.
- For a service with a **separate price per language pair**, add the pairs you work in and a price for each. You can also enter a price for all other pairs.
- A row for English → German also applies to variants of those languages, for example English (UK), when they have no row of their own.

Click **Save prices**. A new price applies to requests that arrive after the change; a request that has already arrived keeps the price the client saw.

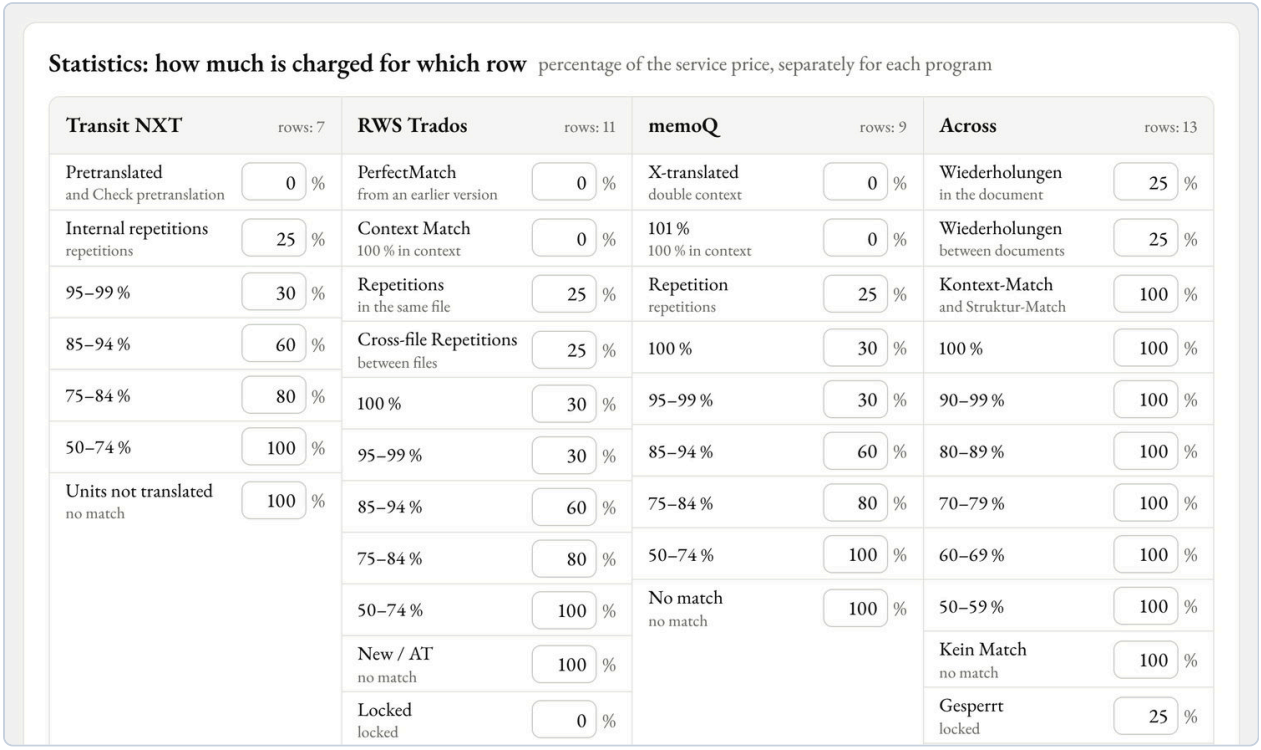
> **A pair without a price.** If a client chooses a language pair that has no price and there is no price for other pairs, the client sees “price in the quote” instead of a price. You cannot send that quote until you enter the price here.

5.4 File types

The card **File types we accept** lists what clients can send: Microsoft Office, OpenDocument, Adobe and prepress formats, translation formats (XLIFF, TMX, Trados, memoQ and Transit packages), web and XML formats, software and text files, and subtitles. PDF is accepted only with a service for which you ticked that option.

5.5 Statistics: what each row costs

Translation tools report how many words are new, how many are repetitions and how many match the translation memory. In this card you set, once, what percentage of the service price you charge for each row. Each program has its own table, with the rows named exactly as in that program's report.



Statistics: how much is charged for which row percentage of the service price, separately for each program

Transit NXT	rows: 7	RWS Trados	rows: 11	memoQ	rows: 9	Across	rows: 13
Pretranslated and Check pretranslation	0 %	PerfectMatch from an earlier version	0 %	X-translated double context	0 %	Wiederholungen in the document	25 %
Internal repetitions repetitions	25 %	Context Match 100 % in context	0 %	101 % 100 % in context	0 %	Wiederholungen between documents	25 %
95–99 %	30 %	Repetitions in the same file	25 %	Repetition repetitions	25 %	Kontext-Match and Struktur-Match	100 %
85–94 %	60 %	Cross-file Repetitions between files	25 %	100 %	30 %	100 %	100 %
75–84 %	80 %	100 %	30 %	95–99 %	30 %	90–99 %	100 %
50–74 %	100 %	95–99 %	30 %	85–94 %	60 %	80–89 %	100 %
Units not translated no match	100 %	85–94 %	60 %	75–84 %	80 %	70–79 %	100 %
		75–84 %	80 %	50–74 %	100 %	60–69 %	100 %
		50–74 %	100 %	No match no match	100 %	50–59 %	100 %
		New / AT no match	100 %			Kein Match no match	100 %
		Locked locked	0 %			Gesperrt locked	25 %

A percentage for each row of the report, separately for Transit NXT, RWS Trados, memoQ and Across.

- 100 means the full price; 0 means the row is not charged.
- **Manual entry of the word count** has one percentage, for repetitions. It is used when you enter the numbers by hand.
- An empty field means the percentage has not been entered. A quote in which that row appears cannot be sent until you enter it.

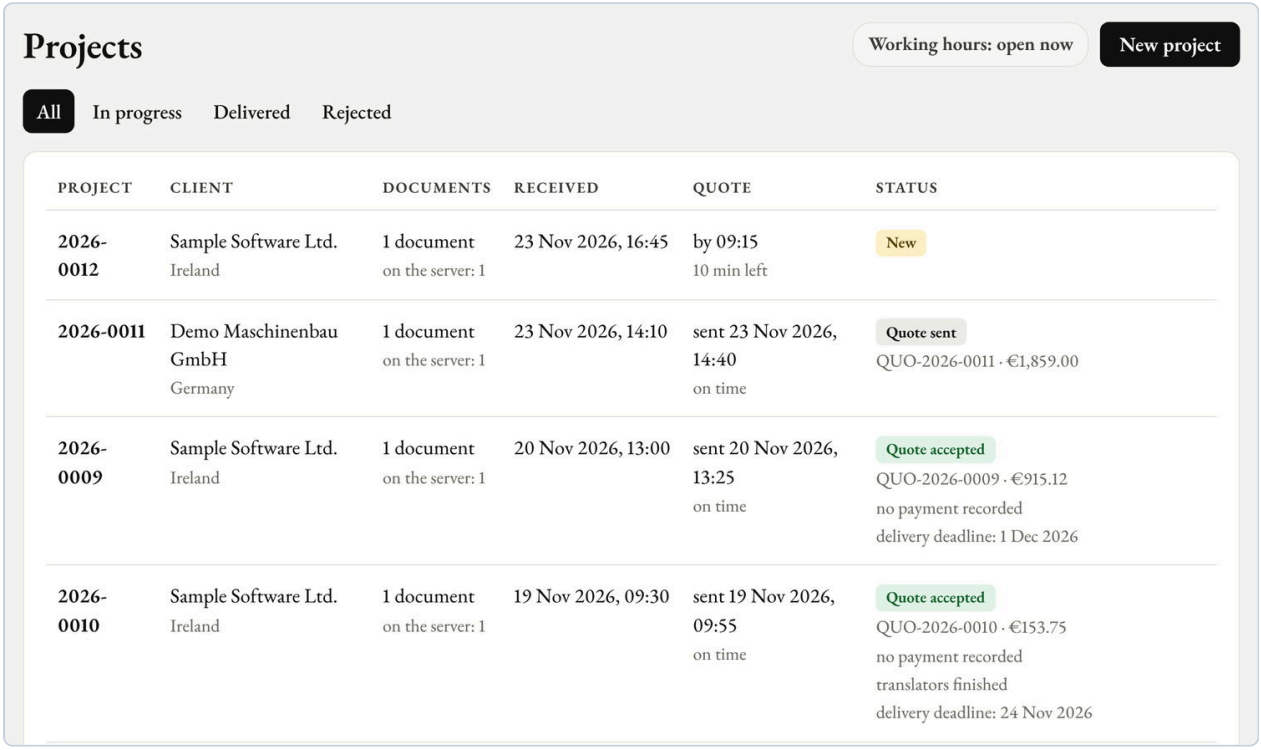
Click **Save percentages**.

6 A project, step by step

This chapter follows one project from the client's request to the invoice. Every project has one page, and that page has seven steps. You always see which step the project is at and what is expected of you.

6.1 The list of projects

Open **Projects**. Each row is one request from a client: who sent it, how many documents, when it arrived, where the quote stands, and the status.



Projects. The tabs at the top filter the list: All, In progress, Delivered, Rejected.

Under the status the program writes what matters at that moment: the quote number and amount, whether payment has been recorded, how far the translators are, and the delivery deadline. Click a row to open the project.

6.2 The project page

At the top of the page are the client, the project number and, on the right, one line that tells you what to do now and how much time you have. Below it are the seven steps:

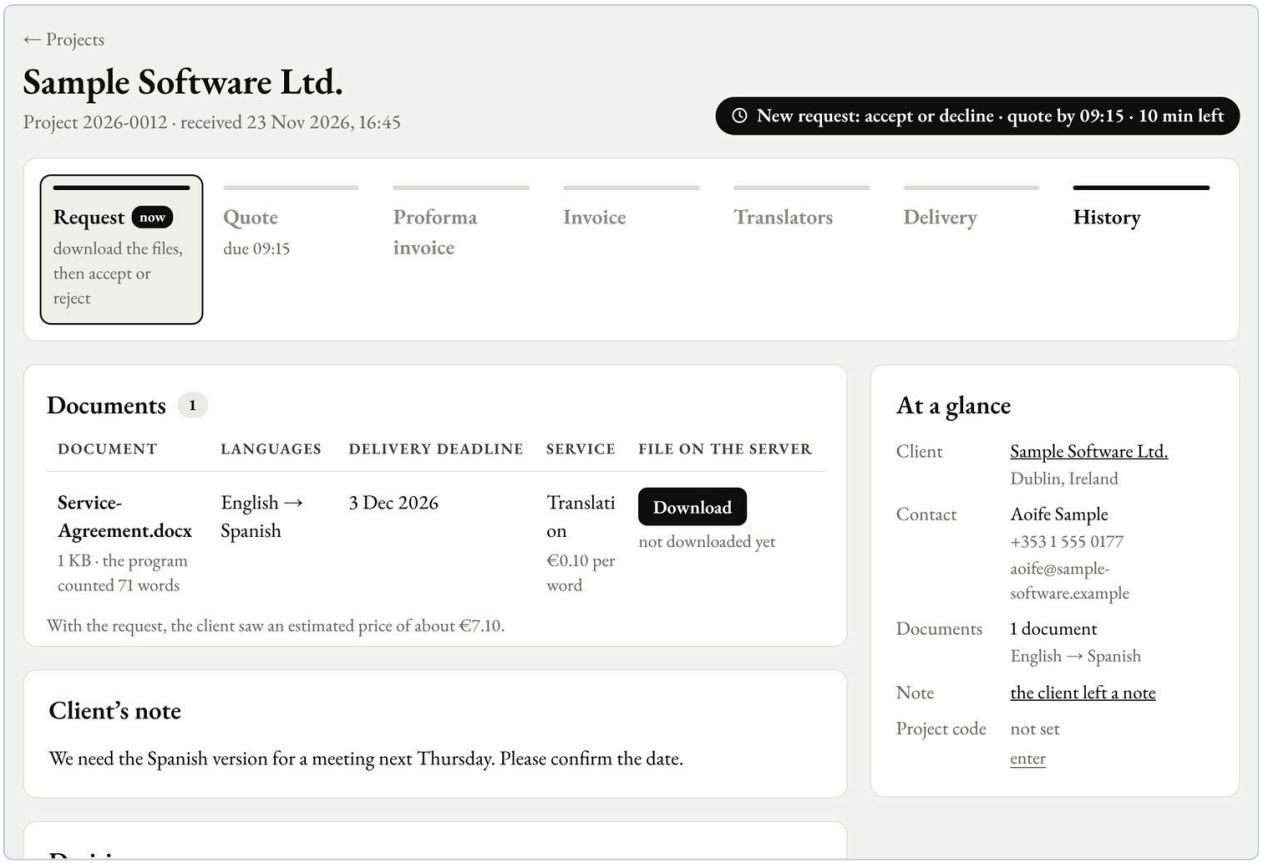
Request	The documents the client sent; you accept or reject the request.
Quote	Statistics, the quote, and the client's answer.
Proforma invoice	The proforma invoice and the payments you have recorded.
Invoice	The invoice and its payment status.
Translators	Who does which job, by when, at what price; your margin.
Delivery	The translation files for the client; complaints.
History	Everything that has happened in the project, with time and name.

The step the project is at carries the mark **now**. On the right, the card **At a glance** always shows the client, the contact person, the documents, the amount, your margin, and links to the PDF of each document issued.

If you keep your own project records, click **enter** next to **Project code** and type your code. It then appears on the quote, the proforma invoice and the invoice, next to the reference the client sent.

6.3 A request arrives

When a client sends a request on the portal, you get an e-mail at the notification address, and the request appears on **Today** and at the top of **Projects**, together with the time by which the quote is due.



A new request: the documents, the client's note, and the decision.

1. Under **Documents** you see each document with its languages, the deadline the client asked for, and the service with its price. Click **Download** to look at the file. The program has already counted the words in it and tells you what estimate the client saw.
2. Read the **Client's note**, if there is one.
3. Under **Decision** click **Accept project** and then **Yes, accept**. The client immediately gets a message that the request has been accepted.

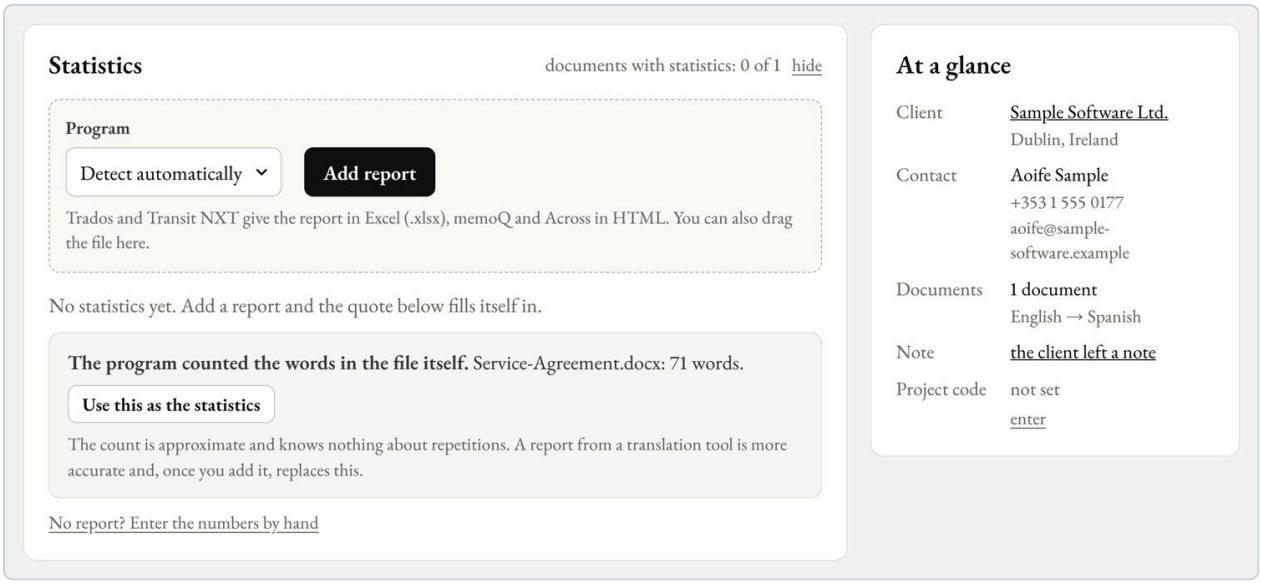
If you cannot take the job, click **Reject project**, write the reason and click **Reject and notify the client**. The client sees the reason, and the files are deleted from the server.

A request that came by e-mail or phone

You can enter a request yourself. Click **New project**, choose the client and click **Next**. Choose the person at the client who will receive the quote, add the documents, and for each one the languages, the service and the delivery deadline, exactly as the client would on the portal. Click **Enter the request**. Such a request is accepted right away and waits for a quote; the client gets no message until you send the quote. A client who is not in the list is entered first, under **Clients** (chapter 7).

6.4 Statistics and the quote

Once the request is accepted, the project moves to the step **Quote**. The quote needs one thing from you: the number of words.

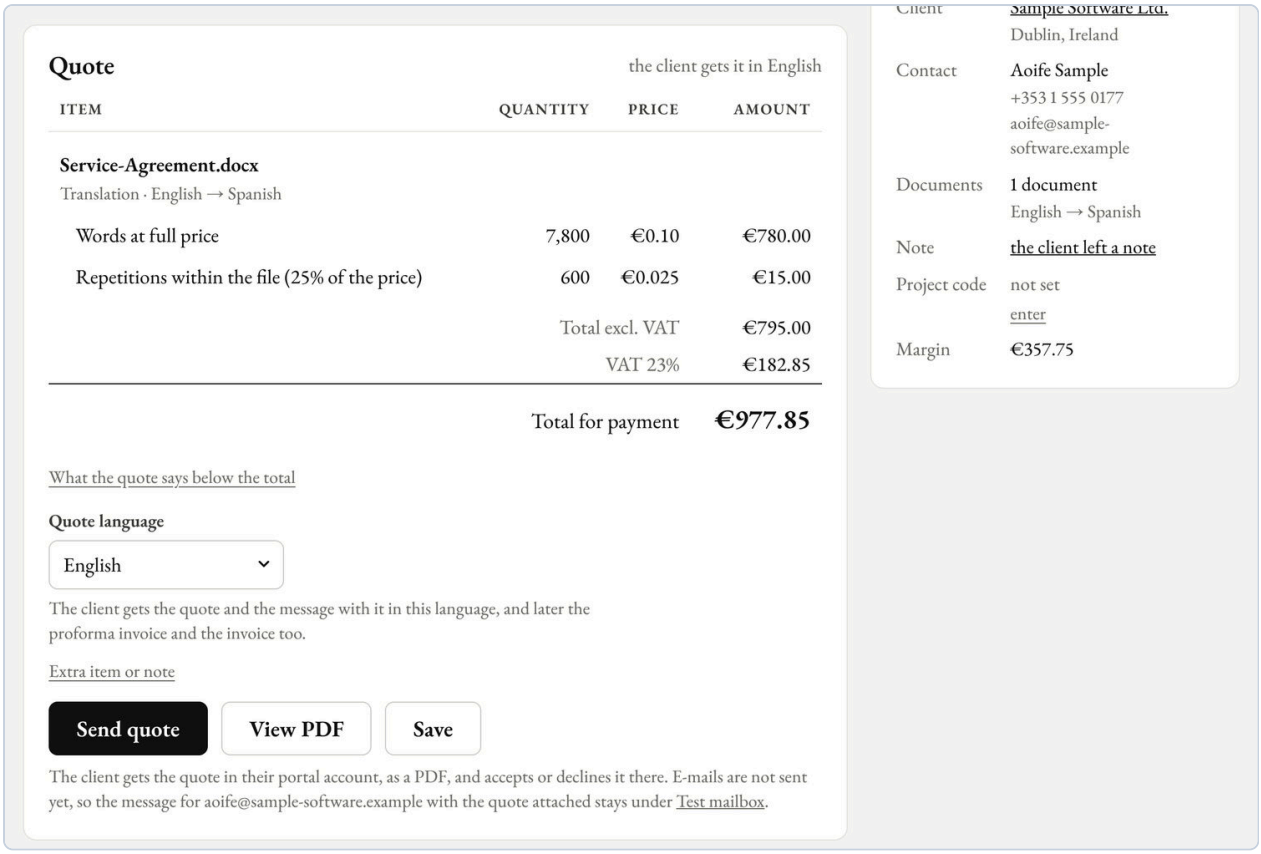


Statistics: a report from your translation tool, the program's own count, or the numbers typed by hand.

There are three ways to give it:

- **A report from your translation tool.** Analyse the document in Trados, memoQ, Transit NXT or Across, save the report and add it with **Add report**, or drag it onto the page. Trados and Transit NXT give the report in Excel (.xlsx), memoQ and Across in HTML. The program recognises the tool by itself. This is the most accurate way, because the report knows about repetitions and matches from the translation memory.
- **The program's own count.** For common file types the program counts the words in the file itself. Click **Use this as the statistics**. The count is approximate and knows nothing about repetitions.
- **By hand.** Click **No report? Enter the numbers by hand**, type the total number of words and how many of them are repetitions, and click **Save numbers**.

If one report covers several documents, the program matches each document to its part of the report; you can correct the match in the table that appears.



The quote fills itself in from the statistics and the price list.

As soon as the statistics are in, the card **Quote** shows the items and amounts: each row of the statistics at its percentage, the total, and the tax for a domestic client. Before you send it you can:

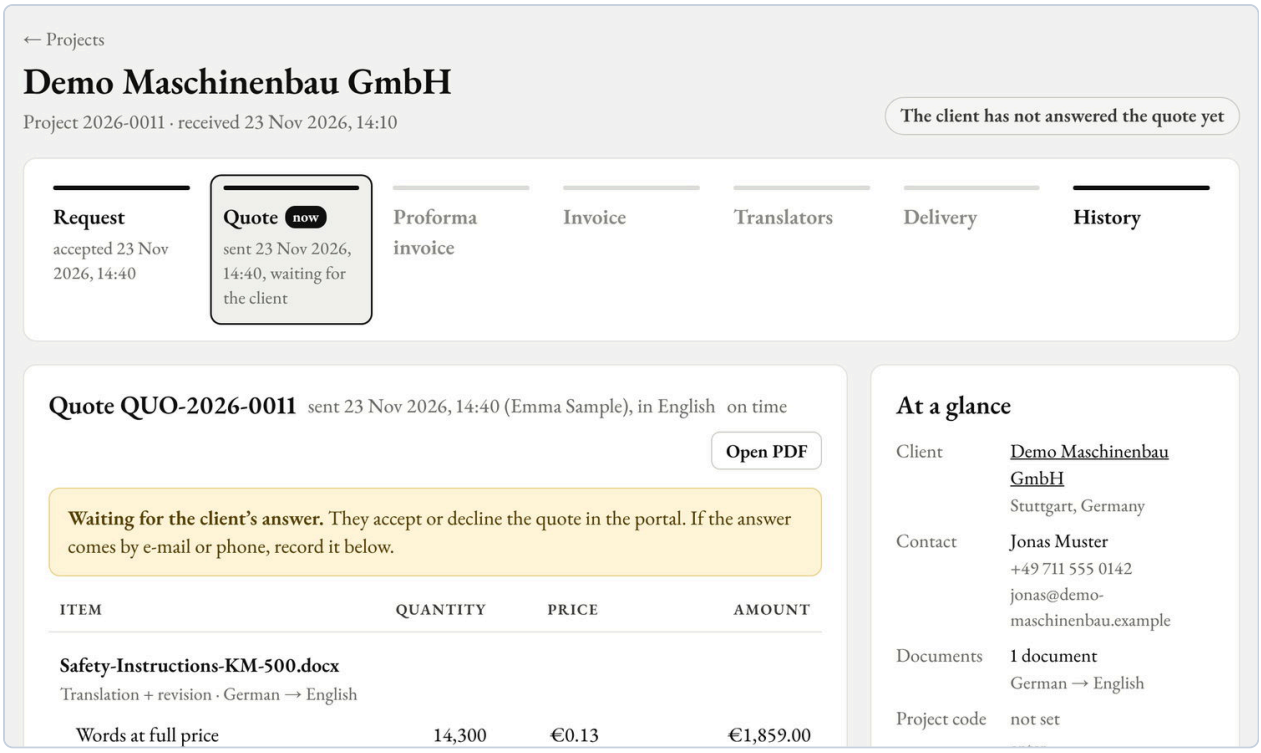
- choose the **Quote language**; the client later gets the proforma invoice and the invoice in the same language;
- add an **Extra item or note** with a description and an amount, for example a discount as −50.00 or a charge for urgent delivery;
- write a **Note on the quote** for this client;
- click **View PDF** to see the quote exactly as the client will get it.

Click **Send quote**. The client gets the quote by e-mail, with the PDF attached, and sees it in their portal account.

> **Send quote is not available?** The page lists what is still needed above the button: statistics for a document, a price for a language pair, or a percentage for a row of the statistics. The last two are entered in the price list (chapter 5).

6.5 The client's answer

The client accepts or declines the quote on the portal, and the project moves on by itself. If the answer comes by e-mail or phone instead, you record it on the same page.



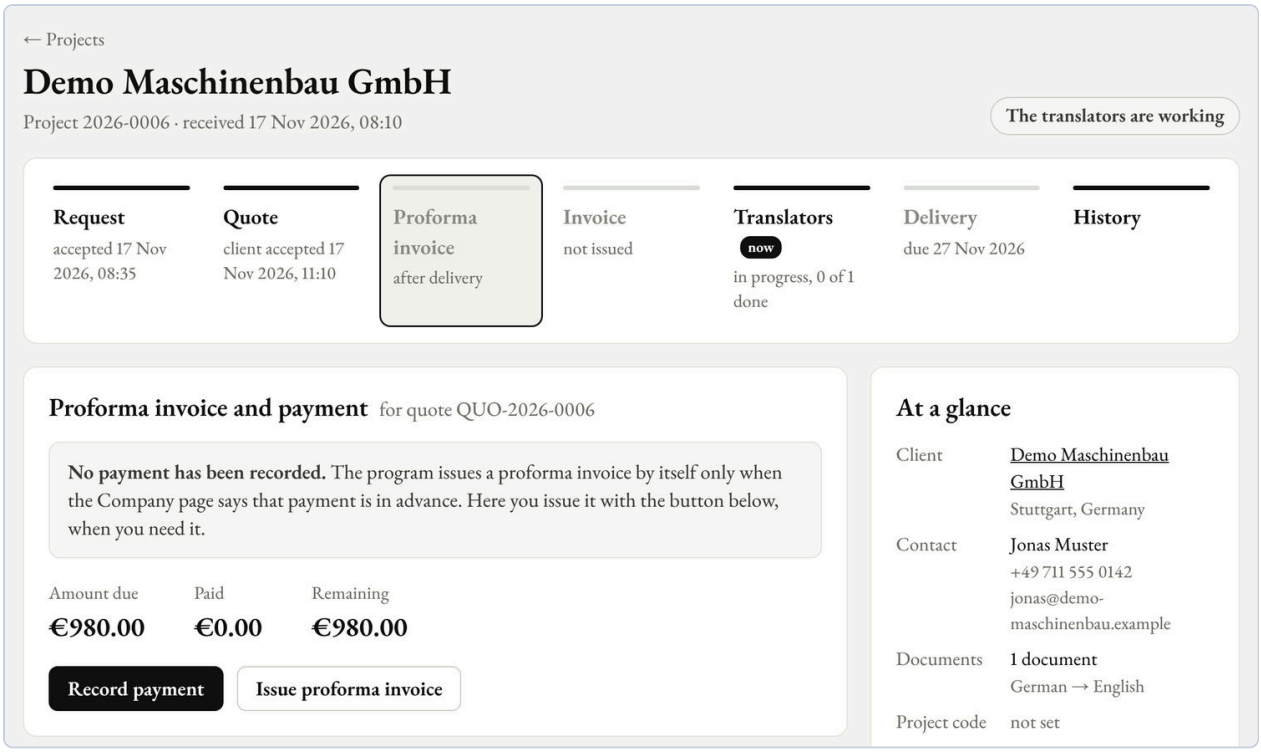
A quote that has been sent. Below the amounts are the buttons for recording the client's answer.

The client accepted	Records that the client accepted the quote. Do this only when the client has told you so.
The client paid based on the quote	The money has arrived, but the client has not answered on the portal. Enter the amount and the payment date; the program records both the acceptance and the payment, and issues no proforma invoice.
The client declined	Records the refusal and the reason. The files still on the server are deleted.
Withdraw quote	For a quote sent with a mistake. The client gets a message and can no longer accept it. The quote goes back to draft; you correct it and send it again under a new number.

6.6 Proforma invoice and payment

What happens after acceptance depends on the choice you made on the **Company** page.

- **Payment in advance.** The program sends the client a proforma invoice by itself as soon as the quote is accepted. When the money arrives, you record the payment.
- **Payment after delivery.** No proforma invoice is needed, and you can assign the jobs straight away. You can still issue one with the button **Issue proforma invoice** when a client asks for it.



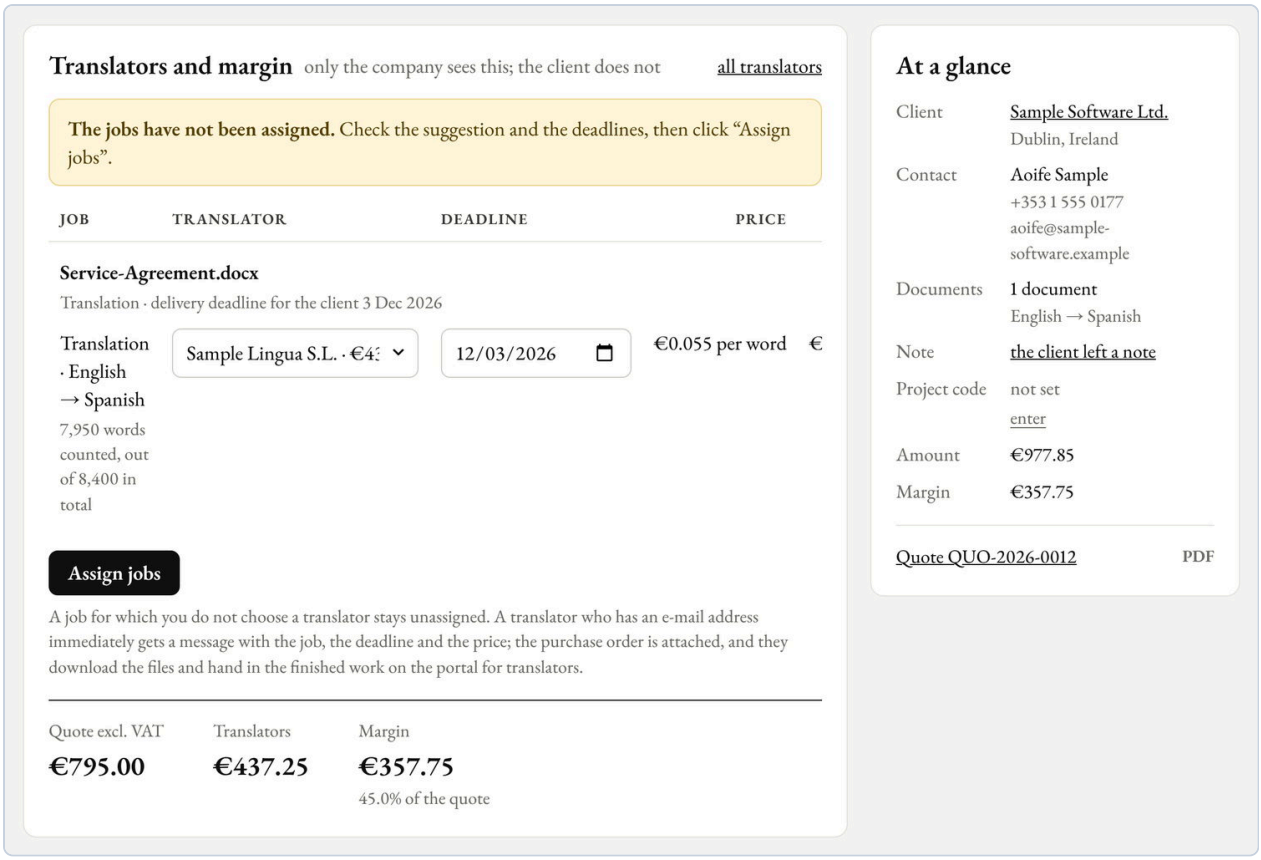
The step Proforma invoice: what is due, what has been paid, and the two buttons.

To record a payment, click **Record payment**, check the amount and the date, add a note such as the bank statement number, and confirm. A payment can be recorded in parts. Once the full amount has been paid, the program sends the client a payment confirmation by itself.

If you have set a time limit for unpaid proforma invoices, the program cancels an unpaid one when the time is up and tells the client. If you accept cards, the client can also pay on the portal; see chapter 13.

6.7 Translators

In the step **Translators** the program has already prepared the jobs for the project, from the kinds of work you ticked for the service: for Translation + revision, a translation job and a revision job for each document and language.



Assigning a job. The program suggests a translator who has a price for this language pair and shows what the job will cost.

Assigning a job to one translator

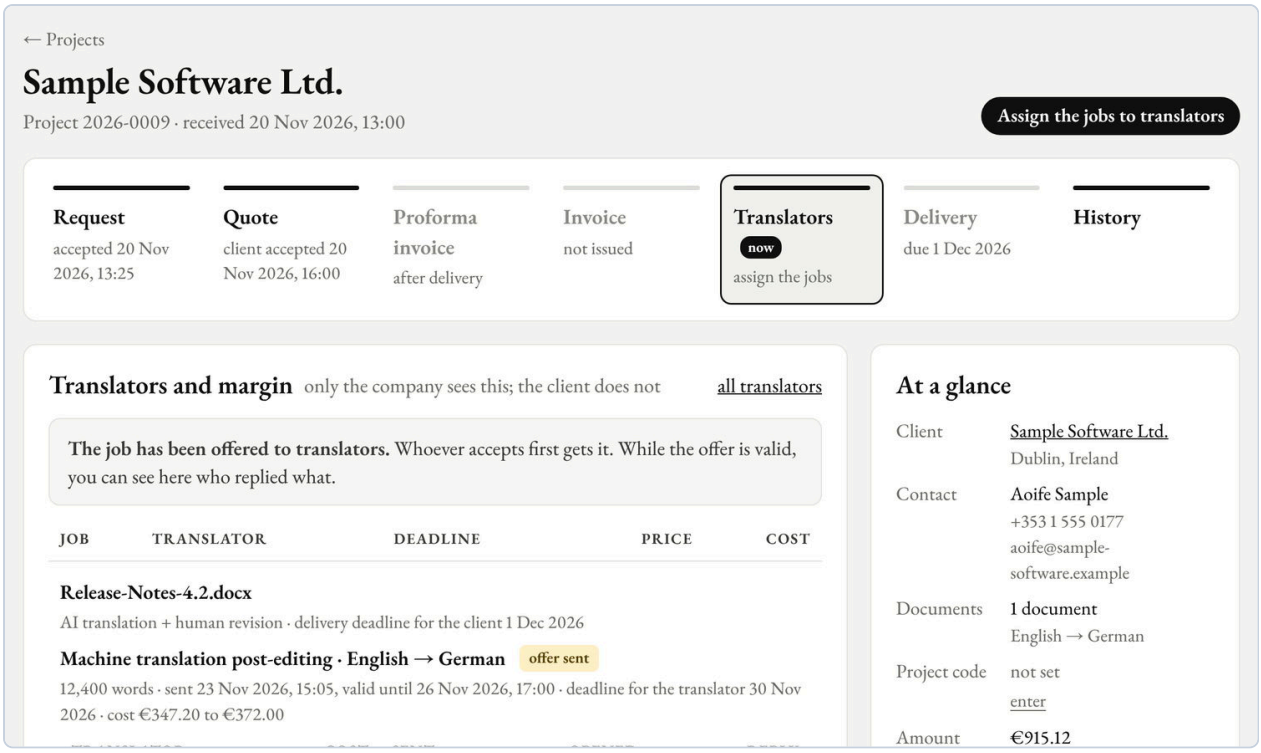
1. For each job choose the translator. The list shows first the translators who have a price for this kind of work and language pair, with the cost of the job, and for everyone how many jobs they have in progress.
2. Check the **deadline** for the translator. The program proposes the client's delivery deadline; set an earlier date to leave yourself time for checking.
3. Click **Assign jobs**.

The translator immediately gets an e-mail with the job, the deadline and the price. The purchase order is attached as a PDF, and the translator downloads the client's document on the translator portal. A translator who has no portal account yet gets a link to set a password in the same message.

The quantity on the purchase order is counted the same way as on the quote: repetitions and matches count at the percentages from your price list. Below the jobs you see the quote amount, the cost of the translators and of AI, and your **Margin**.

Offering a job to several translators

When you do not know who is free, offer the job to several translators at once. Whoever accepts first gets it.



A job offered to two translators. The page shows when each of them opened the offer and what they answered.

1. Choose **Offer to several translators** instead of **Assign to one translator**.
2. Tick at least two translators (twenty at most) and choose until when the offer is valid.
3. Click **Send the offer**.

The offer reaches everyone at the same time, by e-mail and on the translator portal. The first one to accept gets the job at their own price, and the others immediately get a message that the job has been assigned. If nobody accepts before the offer expires, the job stays unassigned and you get a message. You can **Withdraw the offer** at any time.

While the job is in progress

- **change** next to the deadline lets you move the translator's deadline.
- **Take the job away** removes the job from the translator; they get a message that it is no longer theirs.
- **Add a file** sends the translator something more: a translation memory, a glossary, reference material.
- **send a new purchase order** issues a corrected purchase order.

When the translator hands in

The translator hands in the finished files on the translator portal, and you get a message. Download the files, check them and click **Done**. You can give the job a **rating** from 1 (unusable) to 5 (excellent) and add a note. Ratings are seen only by the company; together with punctuality and complaints they form the picture of each translator (chapter 8).

6.8 Delivery

When the translators have finished, the project appears on **Today** as ready for delivery.



The translation file has been added and is ready to be delivered.

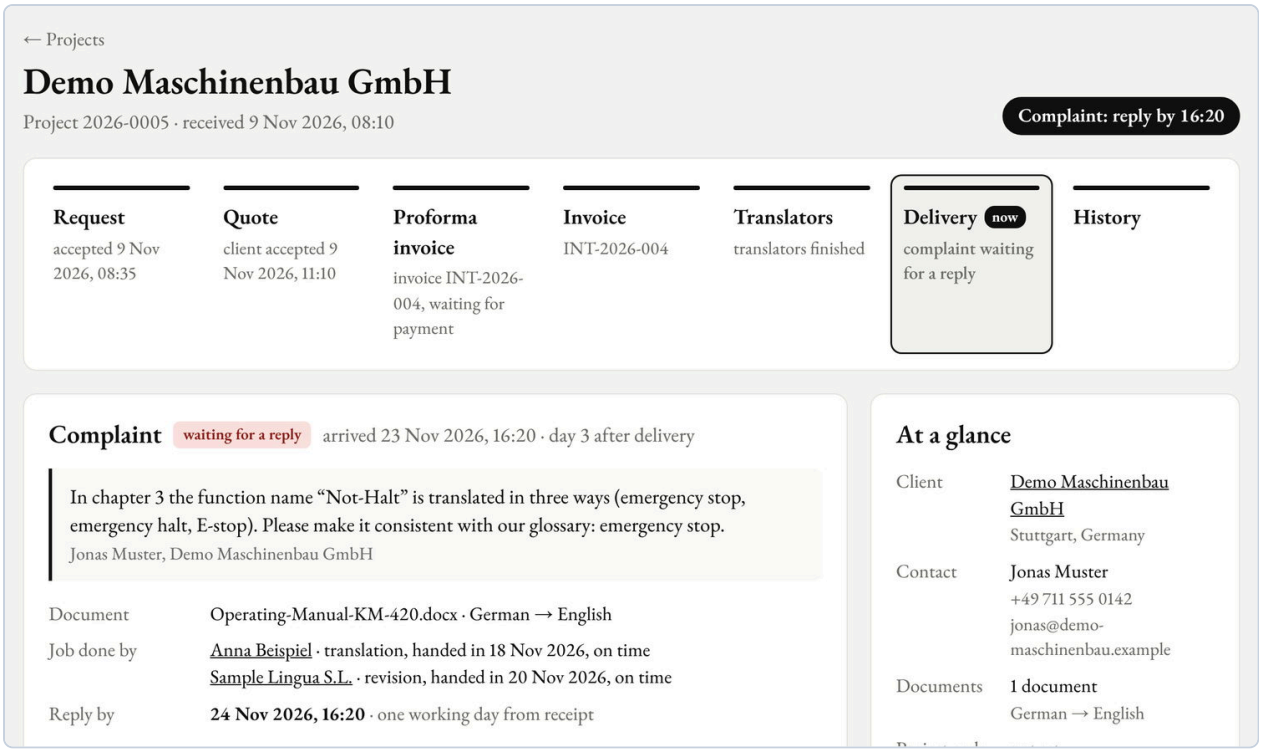
1. Open the step **Delivery** and add the translation files: drag them onto the page or click **Choose files**. The client does not see them yet, and will see the file names exactly as they are here.
2. Click **Deliver to the client**.

The client gets a message that the translation is ready and downloads it from their portal account. The files stay available for the time you set on the **Company** page; after that they are deleted from the server.

- **Wrong file?** Click **withdraw delivery**. The files are deleted from the server immediately and the client is told that the delivery has been withdrawn. Then deliver the correct ones.
- **A corrected version or the rest of the translation** goes out as a **New delivery**. Each delivery has its own download period.

6.9 Complaints

For seven days after delivery the client can send a complaint from the portal, with a remark and a file. You get a message, the project is marked on **Today**, and the page shows by when you should reply: one working day from receipt.



A complaint: the client's remark, who did the job, and the deadline for your reply.

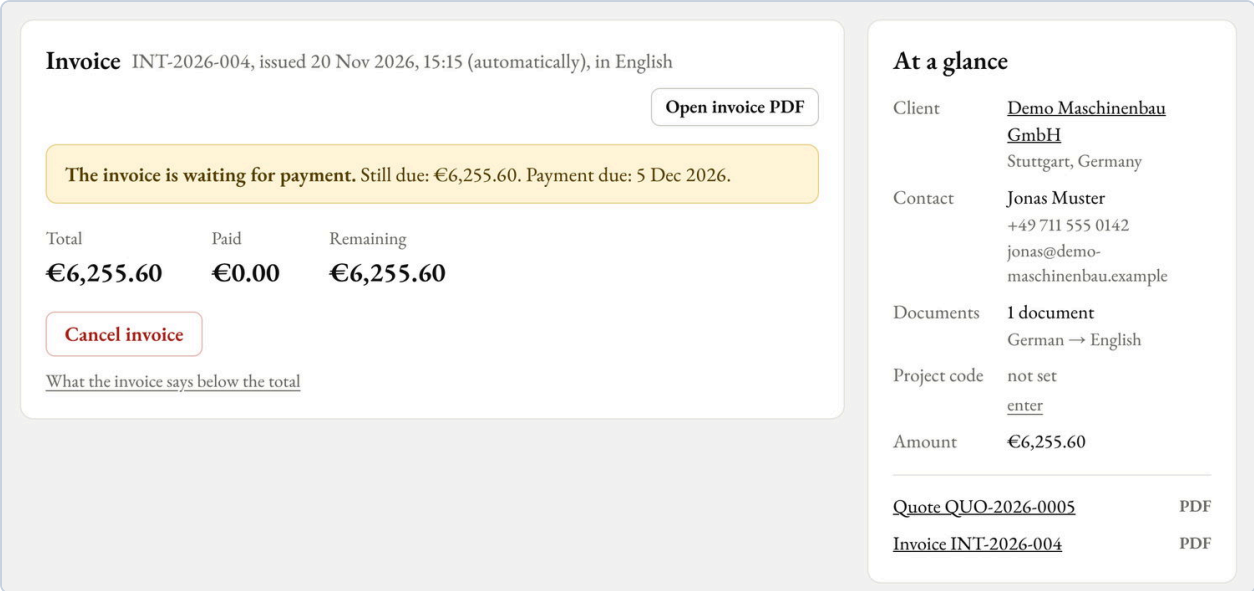
The complaint card offers three actions, in the order in which you usually need them:

1. **Return the job to the translator for correction.** Choose the translator and the correction deadline and click **Return for correction**. The translator gets the client's remark and attachment, and the job is opened for them again. The box **at no extra charge** is ticked unless you decide otherwise.
2. **Reply to the client.** Write the reply and click **Send the reply**. It reaches the client by e-mail and appears on the portal next to their complaint.
3. **Close the complaint** as **justified**, **partly justified** or **unjustified**, and choose the translator it is recorded against, if any. The decision goes into that translator's ratings.

You deliver the corrected translation as a new delivery. A complaint that arrived by e-mail or phone can be recorded with the link at the bottom of the page; the client gets no message about it.

6.10 The invoice

The program issues the invoice by itself at the moment you chose on the **Company** page: after payment, after delivery, or never. In the last case, and whenever you need it earlier, you issue it with the button in the step **Invoice**.



The step Invoice: the amount, what is still due, and the PDF.

- The client gets the invoice by e-mail, with the PDF attached, and sees it on the portal.
- A domestic client gets a number from the domestic sequence and tax is added; a foreign client gets a number from the foreign sequence, without tax.
- Below the total the invoice carries the tax specification, the payment due date, your bank details, the payment reference and your notes.

Correcting an invoice

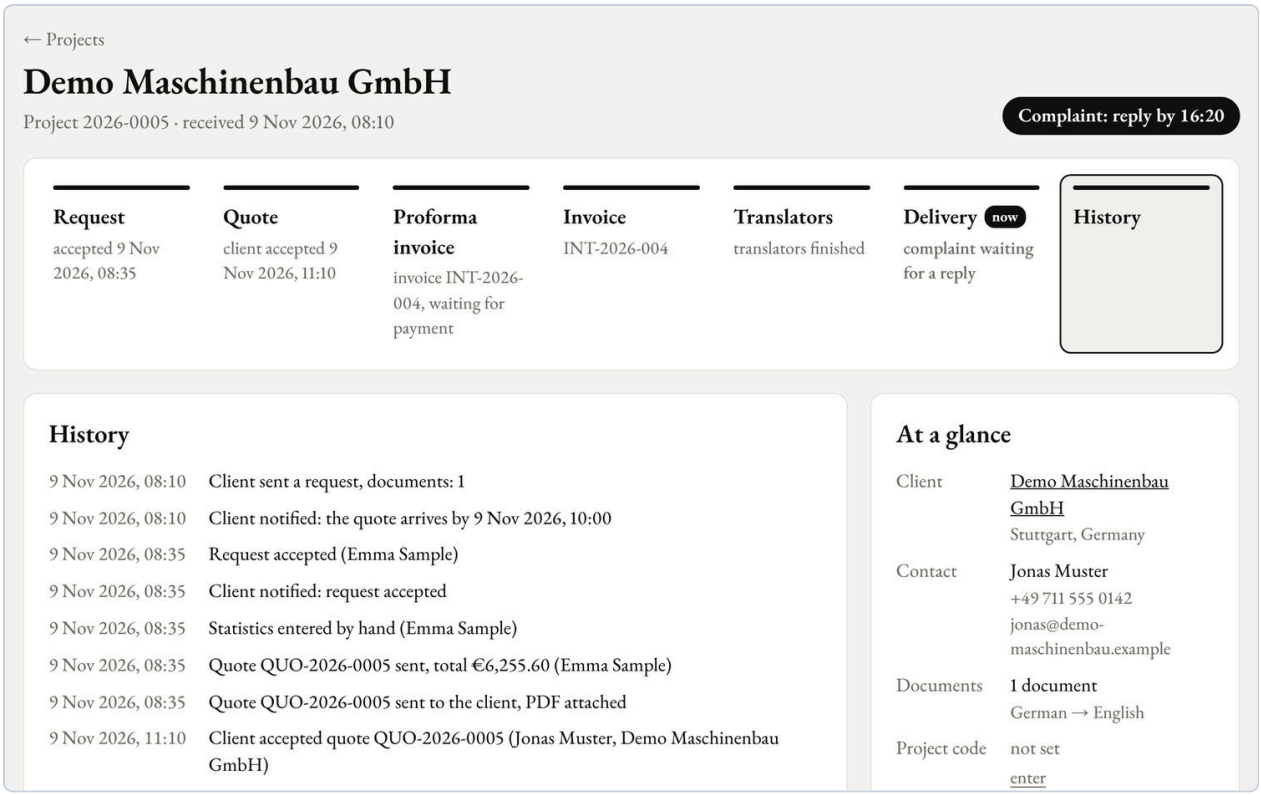
An invoice is not deleted. Click **Cancel invoice**, enter the reason if you want the client to see it, and leave **Issue the corrected invoice right away** ticked. The corrected invoice is issued under the same number and with the same date of issue, with the data as it is now, and the client gets one message saying that it replaces the earlier one. Recorded payments stay.

An invoice for work outside the program

Open **Invoices** and click **New invoice**, choose the client, click **Next** and enter the items. Use this for work that did not go through a project.

6.11 History

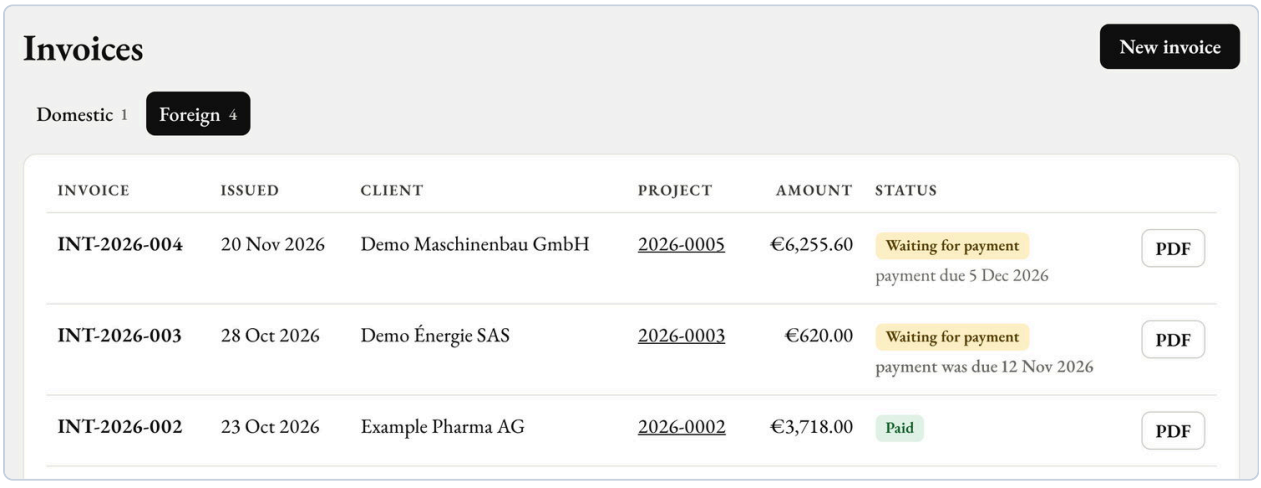
The last step lists everything that has happened in the project: every message sent, every document issued and every decision, with the time and the name of the person. When a client asks “when did you send it?”, the answer is here.



History: the whole project, line by line.

6.12 Finding a document

Three pages in the menu list every document the program has issued: **Quotes**, **Proforma invoices** and **Invoices**. Use them when you are looking for a document, not a project. Each list shows the number, the date, the client, the project, the amount and the status. **PDF** opens the document; the project number takes you to the project.



Invoices for foreign clients. Domestic and foreign invoices are numbered and listed separately.

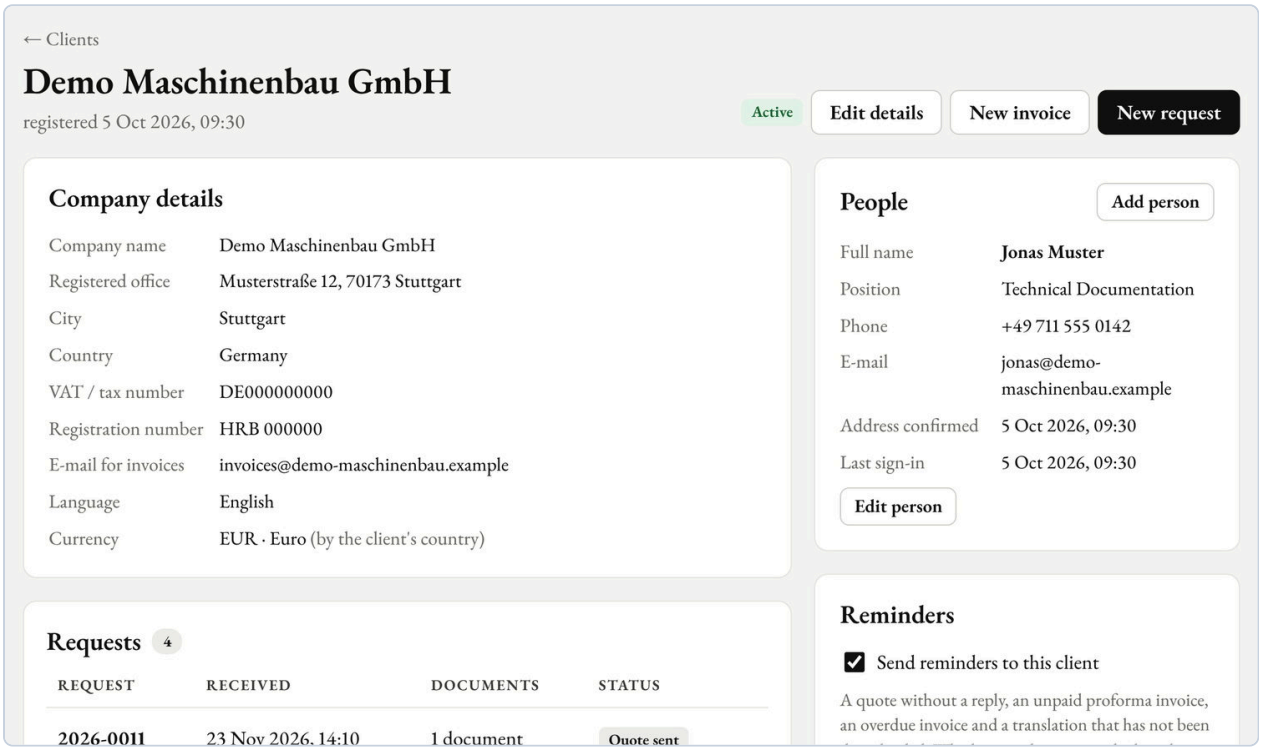
The **Invoices** page has two tabs, **Domestic** and **Foreign**, and shows for each invoice whether it is paid or waiting for payment, with the due date.

7 Clients

A client is a company, with one or more people who send requests on its behalf. Clients register themselves on the client portal, or you enter them.

7.1 The client's page

Open **Clients** and click a company.



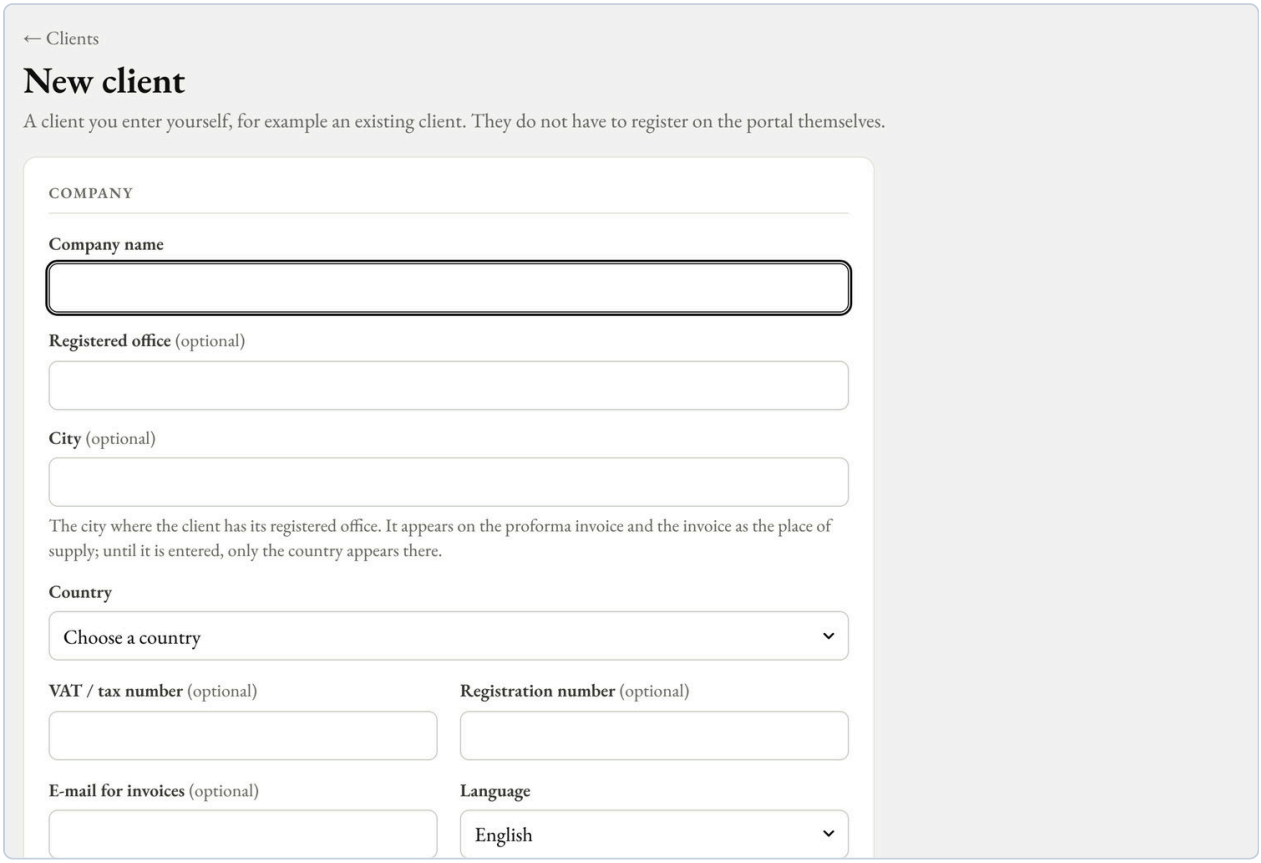
A client: company details, the people, and all requests so far.

Company details	Name, registered office, city, country, VAT / tax number, registration number, e-mail for invoices, language and currency. Click **Edit details** to change them. The language decides in which language the client gets messages and documents; the currency, in which currency they see prices.
People	Everyone at the client who can sign in to the portal. **Add person** adds a colleague; **Edit person** changes their details.
Requests	All requests of this client, with their status.
Reminders	Untick **Send reminders to this client** for a client who should not get automatic reminders.

The buttons **New request** and **New invoice** at the top start a request or a manual invoice for this client.

7.2 Entering a client yourself

Click **New client**. Only the company name and the country are required; everything else can be added later.

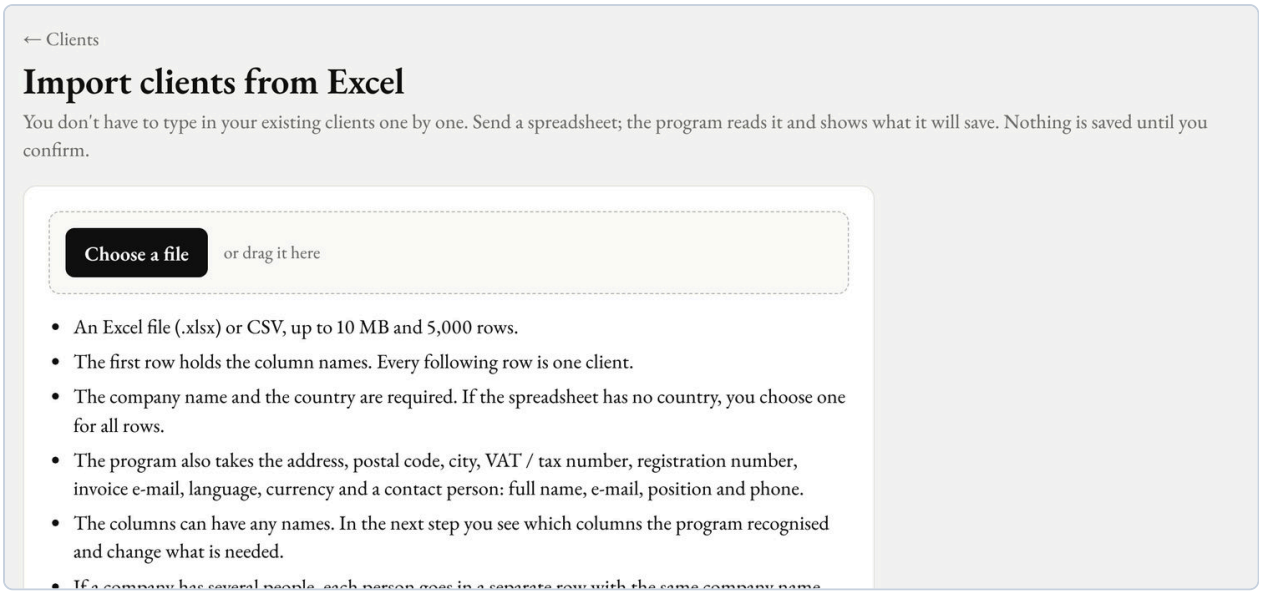


A new client. The contact person receives the quotes.

If you enter a contact person with an e-mail address, quotes go to that address. The person does not have to use the portal: they can answer a quote by e-mail and you record the answer. When they do want to use it, click **Send portal invitation** on the client's page; they get a link and set their own password.

7.3 Importing clients from Excel

You do not have to type in your existing clients one by one. Click **Import from Excel** on the **Clients** page.



Importing clients. Nothing is saved until you confirm.

- The file is an Excel file (.xlsx) or CSV, up to 10 MB and 5,000 rows. The first row holds the column names; every following row is one client.
- The company name and the country are required. If the spreadsheet has no country, you choose one for all rows.
- The program also takes the address, postal code, city, VAT / tax number, registration number, invoice e-mail, language, currency and a contact person.
- The columns can have any names. In the next step you see which columns the program recognised and change what is needed.
- If a company has several people, each person goes in a separate row with the same company name.
- A client that already exists is skipped, so you can send the same file again after fixing it.

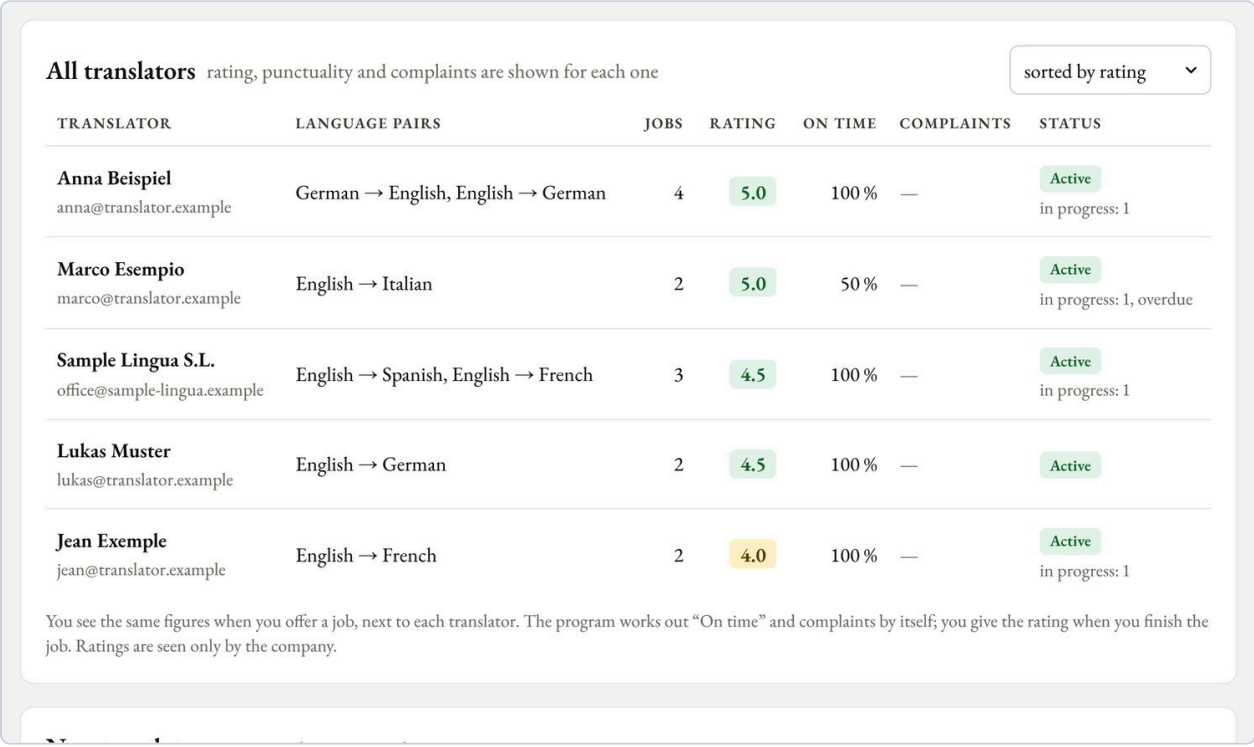
Imported clients are active right away. The people get no message; you send each one a portal invitation when needed.

8 Translators

The **Translators** page holds everyone you work with: translators, revisers, proofreaders and agencies. Each has prices per language pair, a record of jobs and ratings, and payout details. Only your staff can see this page.

8.1 Finding the right translator

At the top of the page, choose a source language, a target language and a type of work, and click **Show**. The program lists the translators who work in that pair, with their prices.



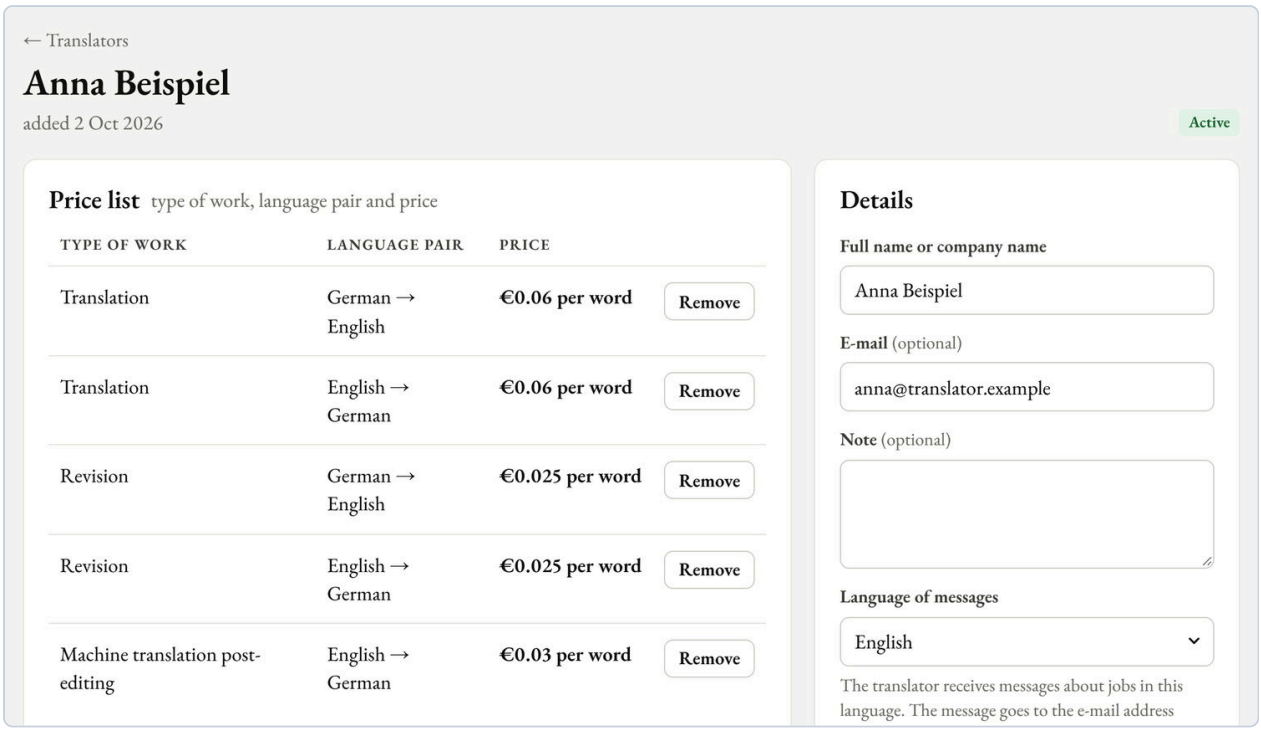
All translators, with rating, punctuality and complaints.

The table **All translators** shows for each one the language pairs, the number of jobs, the average **rating**, the share of jobs handed in **on time**, and justified **complaints**. The program works out punctuality and complaints by itself; you give the rating when you finish a job. You see the same figures next to each name when you assign or offer a job.

8.2 Adding a translator

1 Under **New translator** enter the full name or company name and the e-mail address, and click **Add translator**.

2 On the page that opens, add the prices: type of work, source and target language, price, currency and unit (per word, per character, per standard line, per page or per hour). Tick **same price in the opposite direction too** to add both directions at once. Click **Add price**.

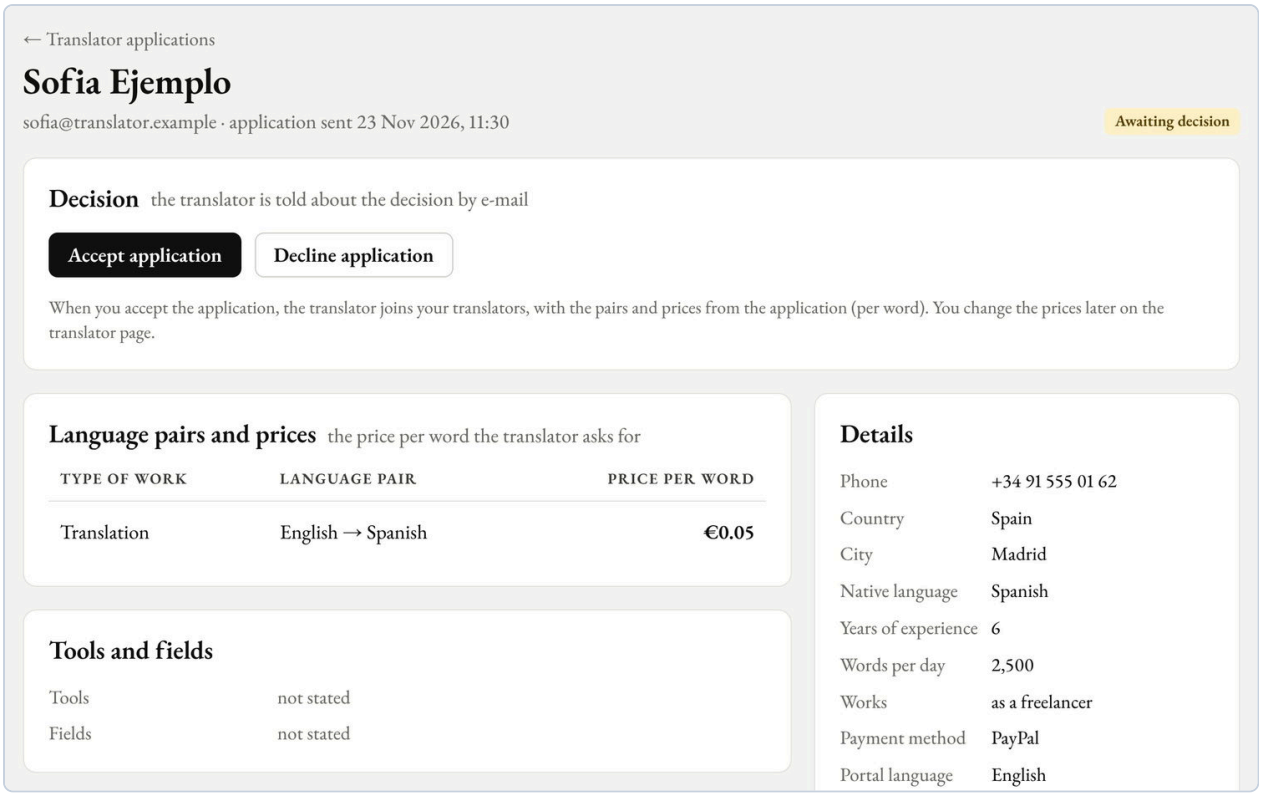


A translator's page: the price list on the left, details on the right.

Under **Details** you set the **Language of messages** for this translator. The translator gets a portal invitation automatically with the first job you assign to them.

8.3 Applications from new translators

Translators can apply to work with you on the translator portal. Put the link to the portal in your job ad; it is shown at the top of **Translators → Translator applications**. Every new application appears on **Today**.



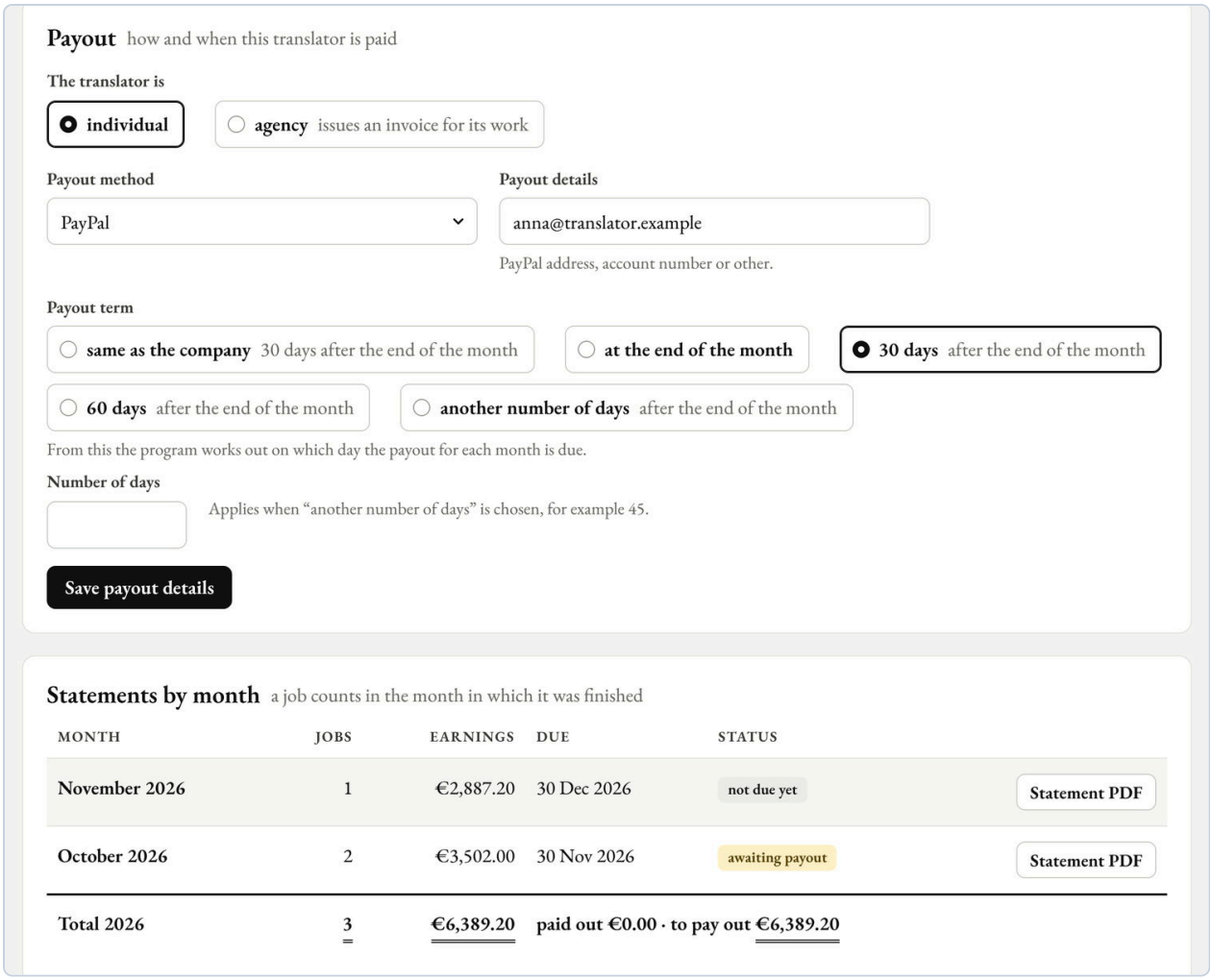
An application: language pairs and the price asked, details, cover letter and documents.

Open the application and read it: language pairs with the price per word the translator asks for, tools and fields, experience, the cover letter, and the attached CV, diplomas and certificates.

- **Accept application**: the translator joins your translators with the pairs and prices from the application, and is told by e-mail. You can change the prices later on the translator's page.
- **Decline application**: the translator is told by e-mail. The reason you enter is seen only by the company.
- **Delete application** at the bottom removes the application, the translator's portal account and all documents.

8.4 Payout details and statements

Lower on the translator's page is the card **Payout**.



Payout details and the statements by month.

The translator is	**individual**, or **agency**: an agency issues an invoice for its work, and you pay against that invoice.
Payout method and details	Bank transfer, PayPal, Wise, Payoneer or other, and the address or account number.
Payout term	**same as the company**, or a term agreed with this translator only.

Under **Statements by month** every month in which the translator finished a job has a statement: the jobs, the quantities, the prices and the total. A job counts in the month in which it was finished. For each month you can download the **Statement PDF**, click **Send the statement to the translator**, and, once you have paid, enter the date, the amount and the method and click **Record payout**. Payouts for all translators together are in the financial report (section 9.3).

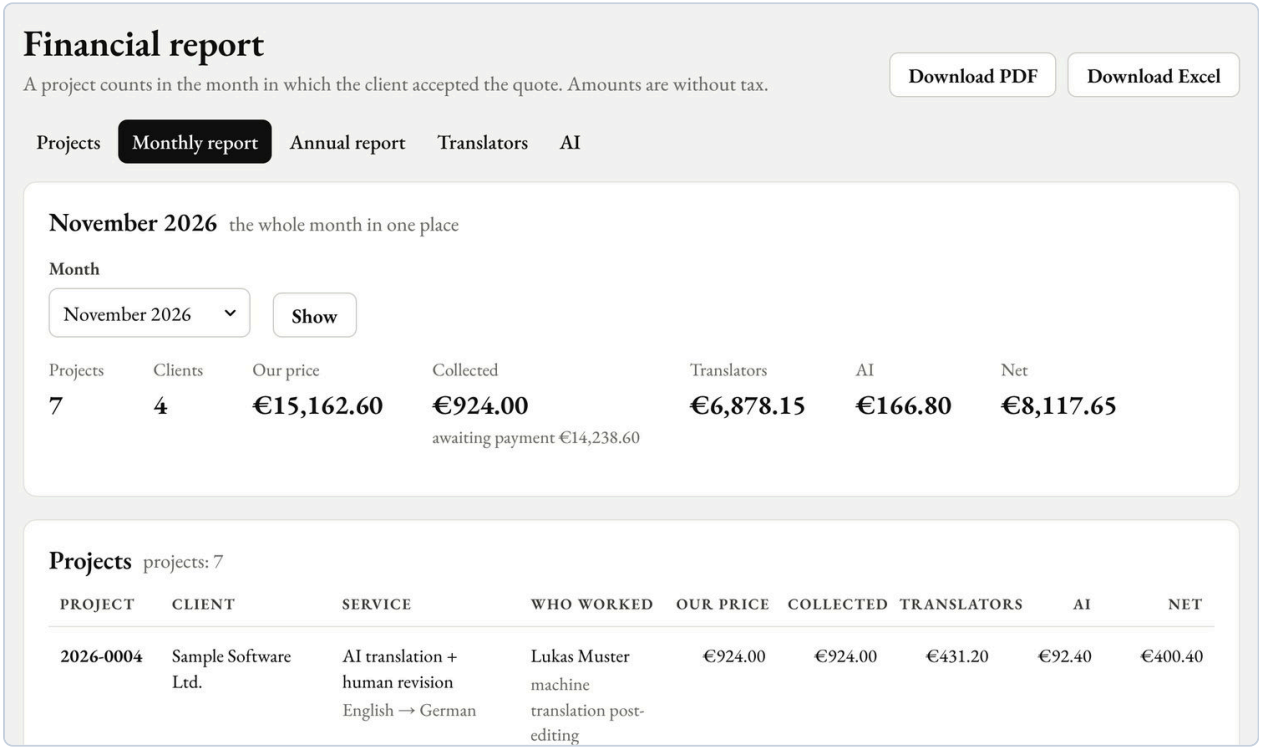
9 The financial report

The financial report shows what each project, each month and the whole year brought in: your price, what was collected, what translators and AI cost, and what is left. It also keeps track of payouts to translators.

Two rules apply to all tabs. A project counts in the month in which the client accepted the quote. All amounts are without tax. On the monthly and the annual report the buttons **Download PDF** and **Download Excel** give you the report you are looking at, for your accountant or your own records.

9.1 Projects and the monthly report

The tab **Projects** lists the projects month by month: your price, the cost of translators and AI, and the margin of each project. The tab **Monthly report** puts one month in one place.



The monthly report: the figures for the month, then every project with who worked on it.

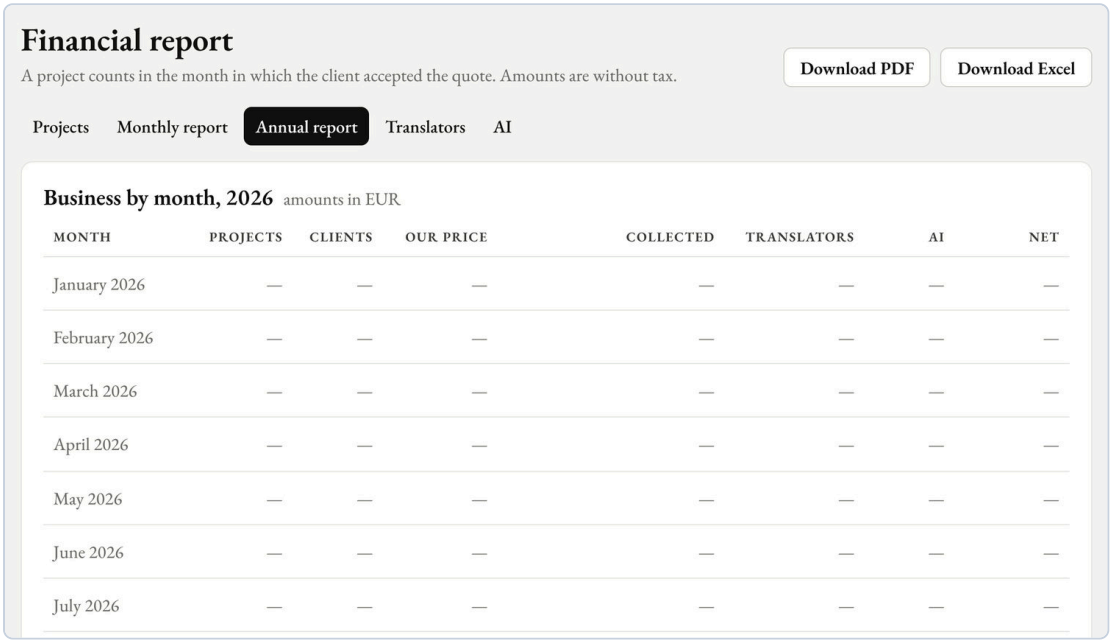
- At the top: the number of projects and clients, **Our price**, **Collected** (what clients have actually paid), **Translators**, **AI** and **Net**. Net is your price less translators and AI.
- **Projects**: each project with the service, who worked on it, and the same amounts.
- **By client**: how much each client brought in and their share of the net amount.

- **By translator**: how many jobs each translator had on this month's projects and what they earned.

> **Cost not known.** If a job was assigned to a translator who has no price for that kind of work, the program cannot know its cost. Such jobs are counted and reported below the table, and the real margin is lower than shown. Enter the missing price on the translator's page.

9.2 The annual report

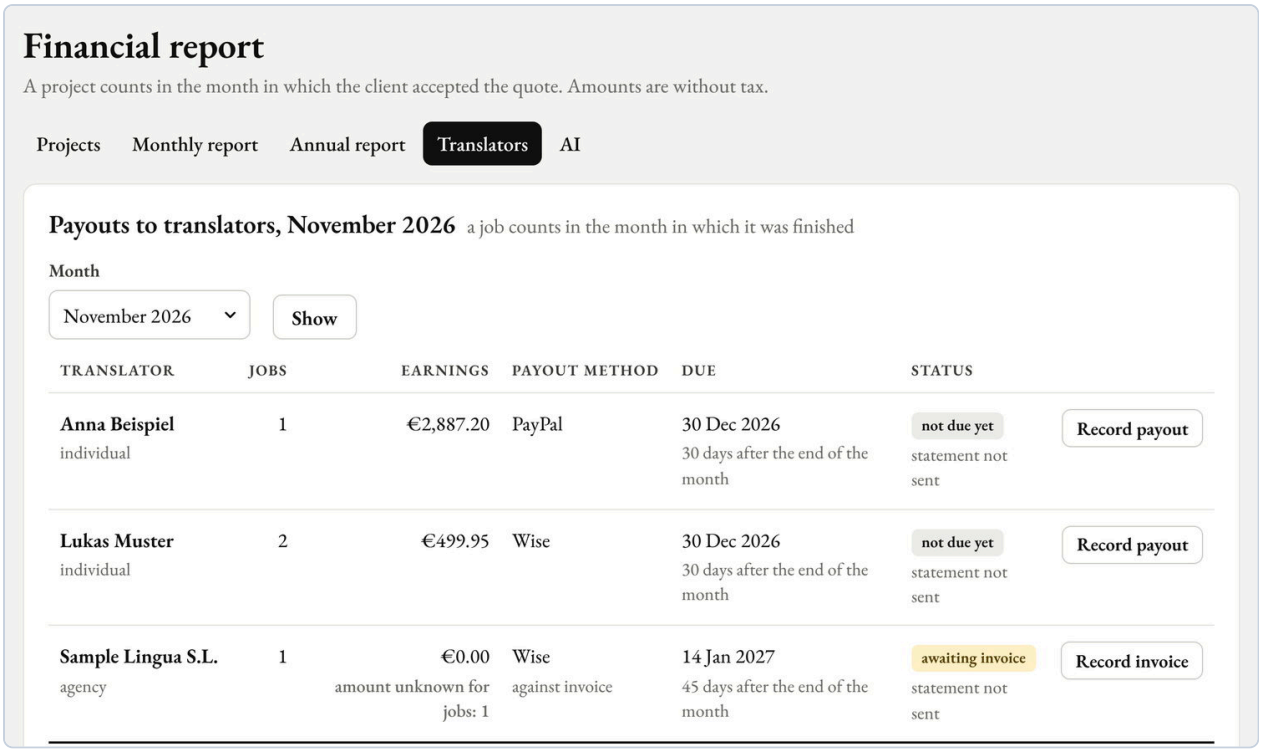
The tab **Annual report** shows the year month by month, with totals, and the same year by client, sorted by net amount.



The annual report.

9.3 Payouts to translators

The tab **Translators** is where you see whom you owe how much, and when. Here a job counts in the month in which it was finished.



Payouts for one month: earnings, payout method, due date and status for each translator.

1. Choose the month and click **Show**. Each translator who finished a job in that month has a row with earnings, payout method, the day the payout falls due and the status.
2. Click **Send statements to all**. Every translator gets the statement for the month by e-mail, with the PDF attached, and sees it on the translator portal. The button sends only the statements that have not been sent yet.
3. When you have paid a translator, click **Record payout** in their row and enter the date, the amount and the method.

- An **agency** is paid against an invoice. Its row says **awaiting invoice** until the invoice arrives; the agency attaches it on the portal, or you click **Record invoice** when it comes by e-mail.
- **Download the payout list** gives you the list for the month in one file, for making the payments.
- **Unpaid from earlier months** lists everything that is still open.
- **Translators by month** shows the year for each translator.

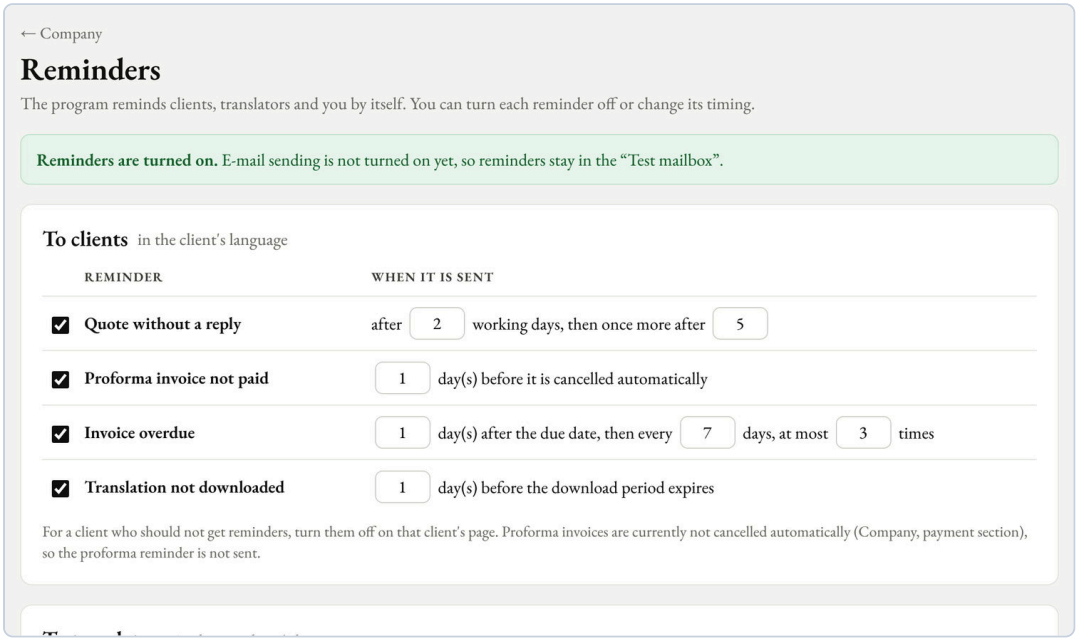
If you ticked the option on the **Company** page, the program sends the statements by itself on the 1st of each month (section 4.8). Payouts that fall due appear on **Today**.

9.4 AI

The tab **AI** shows, month by month, the number of projects in which AI did part of the work and what it cost. The cost is the percentage you entered with the service in the price list; when you change it, the report is recalculated for earlier months as well.

10 Reminders

The program can remind clients, translators and you by itself, so that nothing waits because somebody forgot. Open **Company → Reminders**.



Reminders to clients. Each one can be turned off, and its timing changed.

To whom	Reminder
To clients	A quote without a reply; a proforma invoice not paid; an invoice overdue; a translation not downloaded. Sent in the client's language.
To translators	A deadline approaching; a deadline passed; for agencies, an invoice that has not arrived. Sent in the translator's language.
To you	A request waiting for a quote; a job not assigned; a translator payout falling due; the morning overview of the day. Sent to the notification address.

1. Look through the reminders, untick the ones you do not want and change the timing where you wish, for example after how many working days a client is reminded of a quote.
2. Leave **Send to clients and translators only on working days, during working hours** ticked if you do not want messages to go out at night or at the weekend.
3. Click **Save and turn on**. Until then the program sends no reminders.

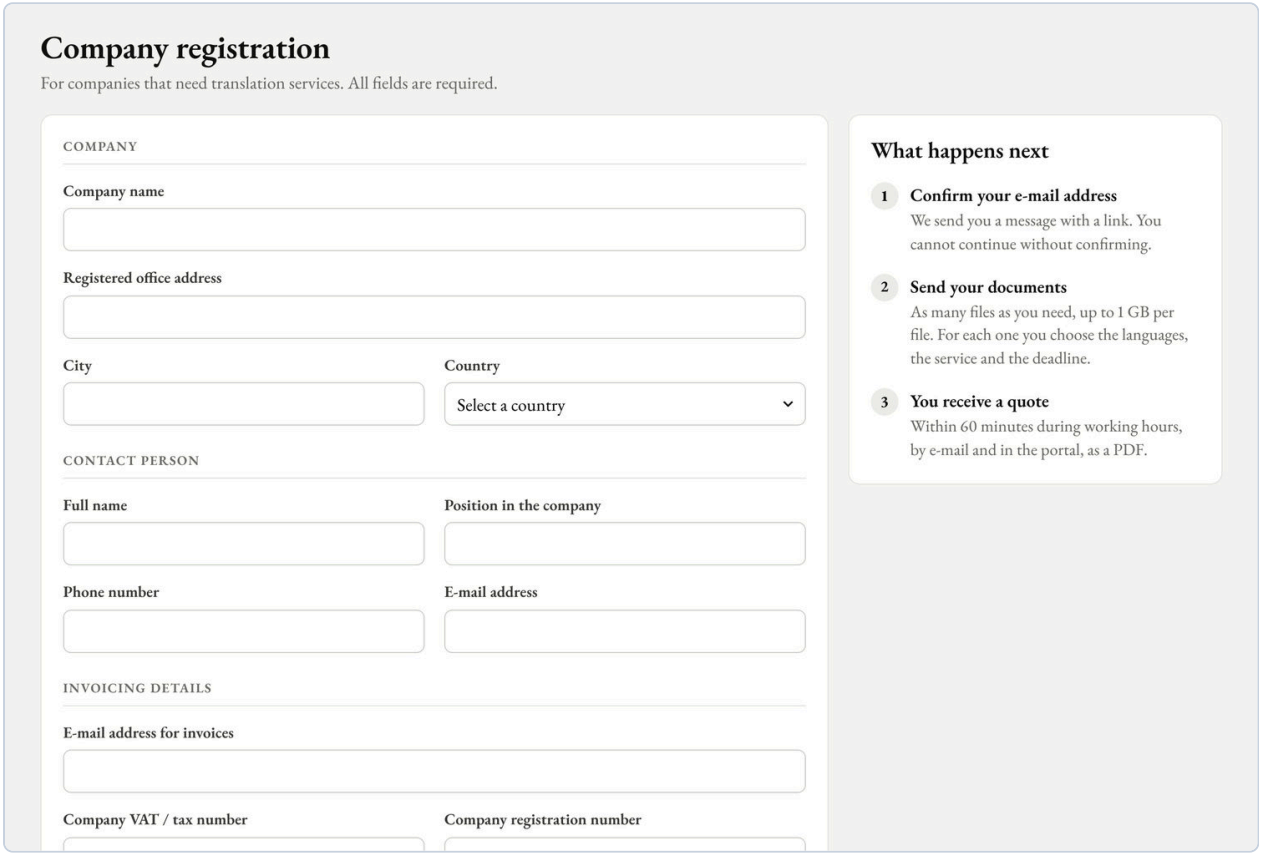
Every reminder is recorded in the project history and is never sent twice. When you turn reminders on, they also cover what is already overdue.

11 The client portal

This chapter shows the system from your client's side, so that you can answer their questions. The portal carries your logo, opens at your second address, and speaks the languages you chose.

11.1 Registration

A new client clicks **Register your company** on the sign-in page and fills in the company, the contact person and the invoicing details. All fields are required.

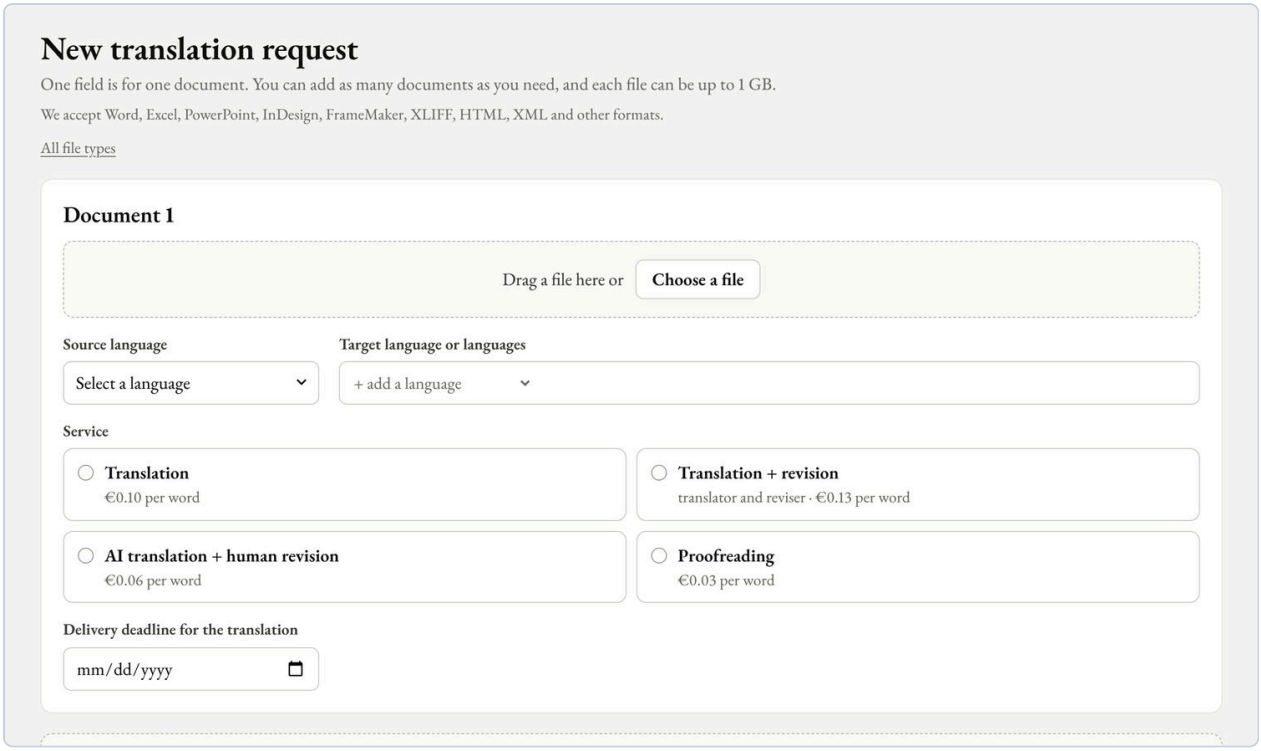


Company registration on the client portal.

1. After **Send registration** the client checks the details once more.
2. The program sends a message with a link. The client opens the link, confirms the e-mail address and sets a password. Without this they cannot continue.
3. The client can now send the first request.

The new company appears in your list of clients. If the confirmation message does not arrive, the client clicks **Did not get the confirmation e-mail?** on the sign-in page.

11.2 Sending a request



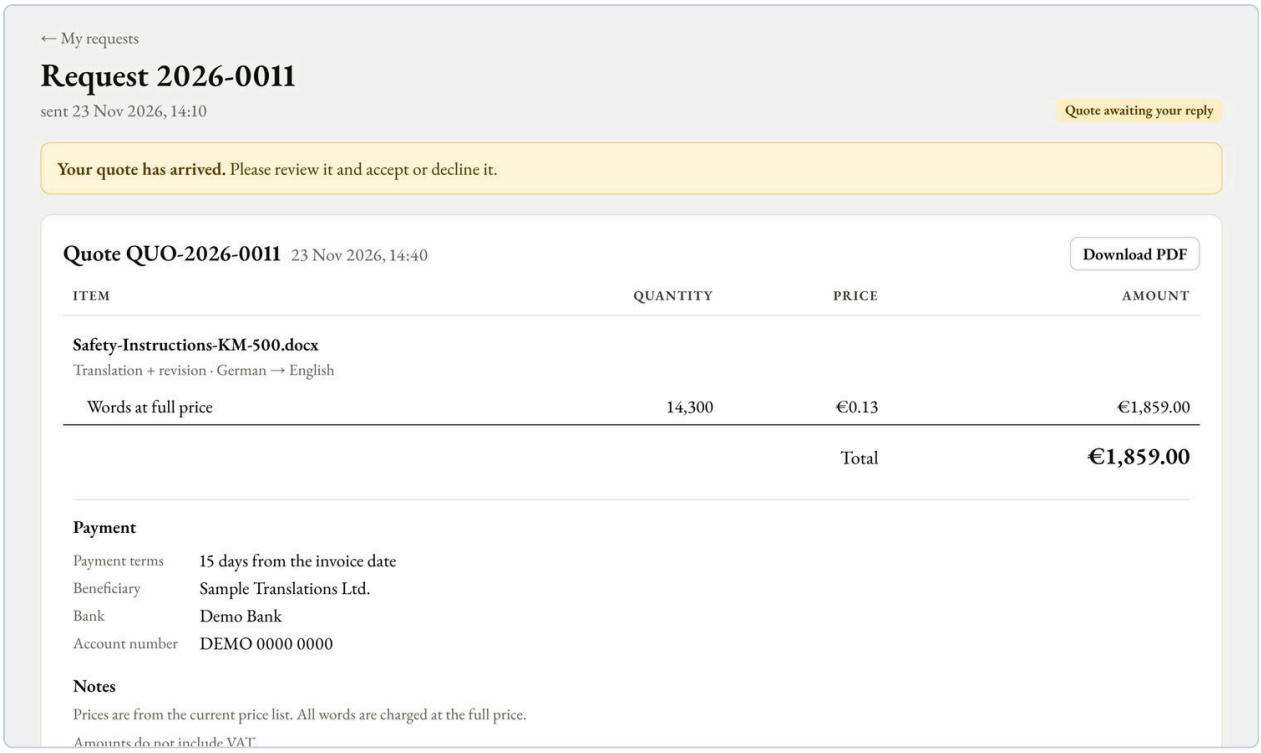
A new translation request. One field is for one document.

1. The client clicks **New request** and adds a document: drags it onto the page or clicks **Choose a file**.
2. For that document they choose the source language, one or more target languages, the service and the delivery deadline. Each service shows your price.
3. **Add a document** adds another one. There is no limit on the number of documents.
4. They can add their own reference for the project and a note, and click **Send request**.

The client is told that the quote will arrive by e-mail and on the portal within the time you set as your quote deadline, during working hours.

11.3 The quote

The client gets the quote by e-mail, with the PDF attached, and on the portal.



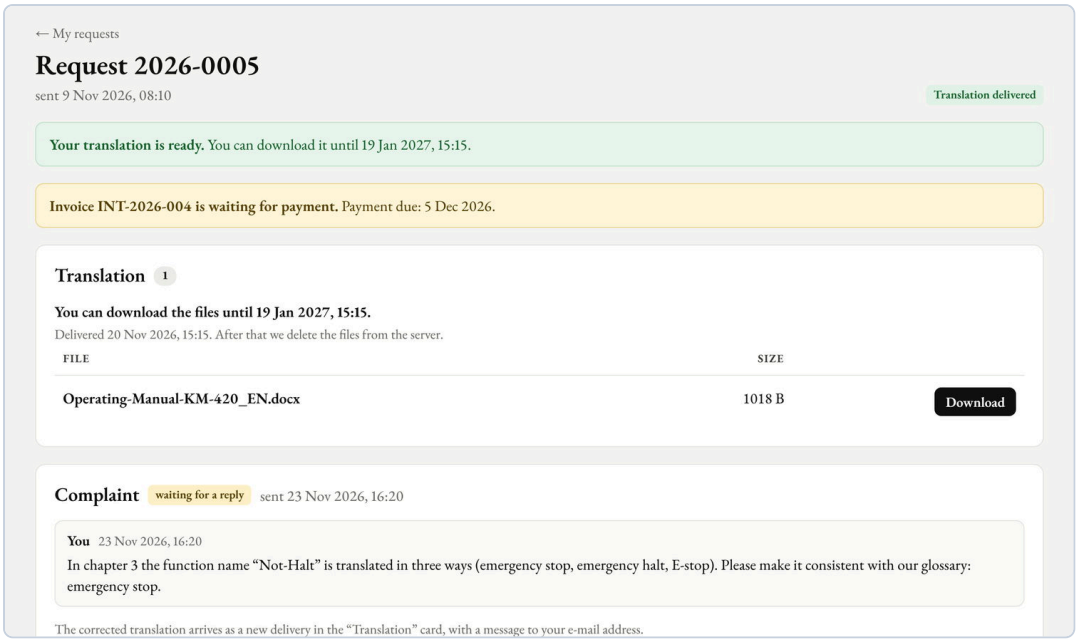
The quote on the portal, with the buttons to accept or decline it.

- **Accept the quote**, then **Yes, I accept the quote**: the project starts.
- **Decline the quote**: the client can give a reason. The files they sent are deleted from the server.

If the client pays in advance, the proforma invoice appears on the same page, with your bank details and, if you accept cards, the button **Pay by card**.

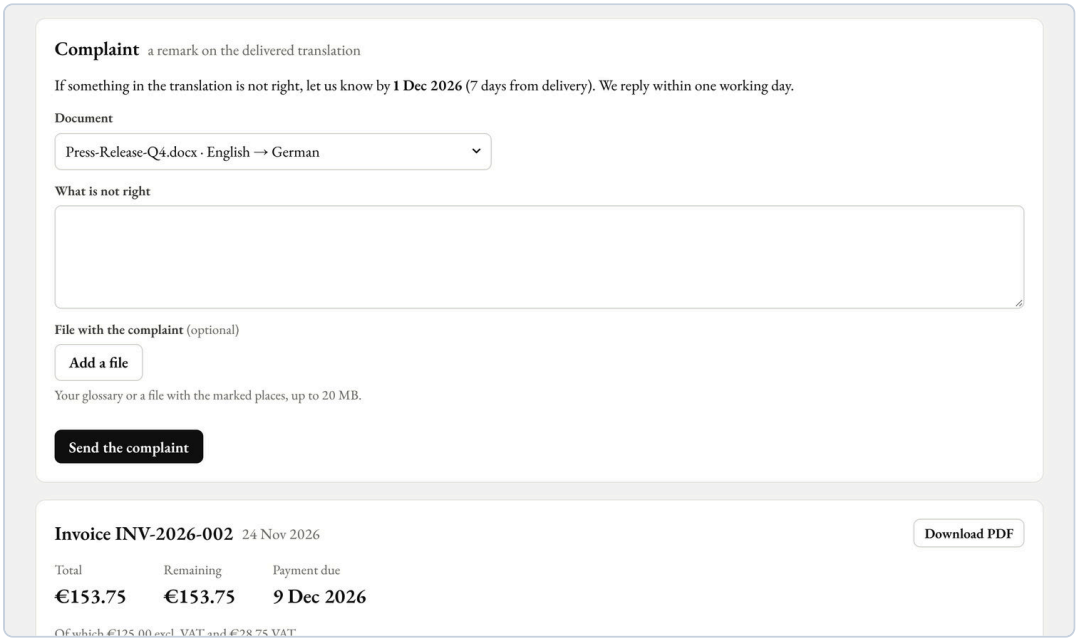
11.4 The translation, complaints and the invoice

When you deliver, the client gets a message and downloads the files from the request page. The page says until when the files are available.



A delivered translation on the portal.

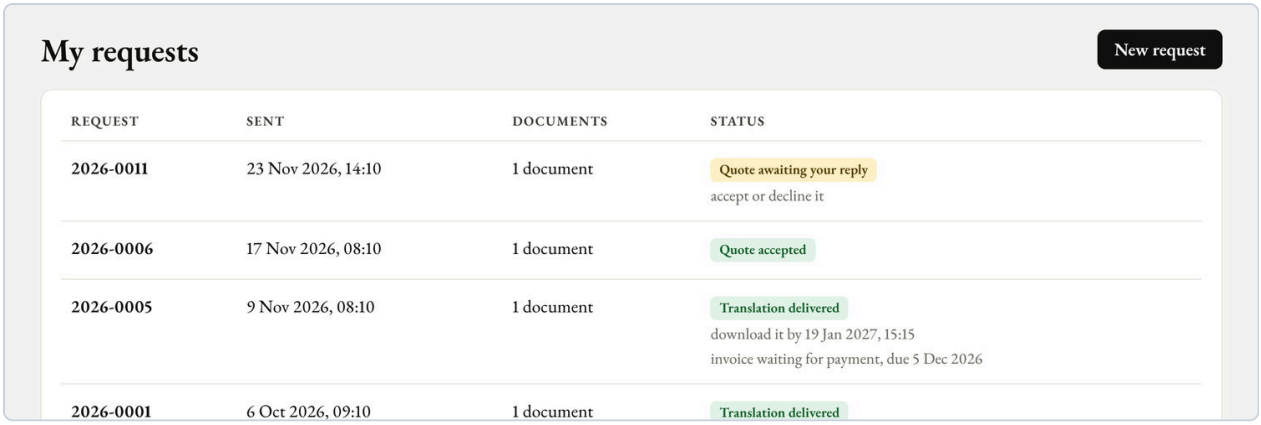
For seven days from delivery the client can send a complaint: they choose the document, write what is not right and can attach a file, for example a glossary or the document with the places marked. Your reply appears in the same place, and a corrected translation arrives as a new delivery.



The complaint form, and below it the invoice.

The invoice is on the same page as a PDF, with the amount still due and the payment due date.

11.5 My requests and company details



My requests: every request with its status and what the client should do next.

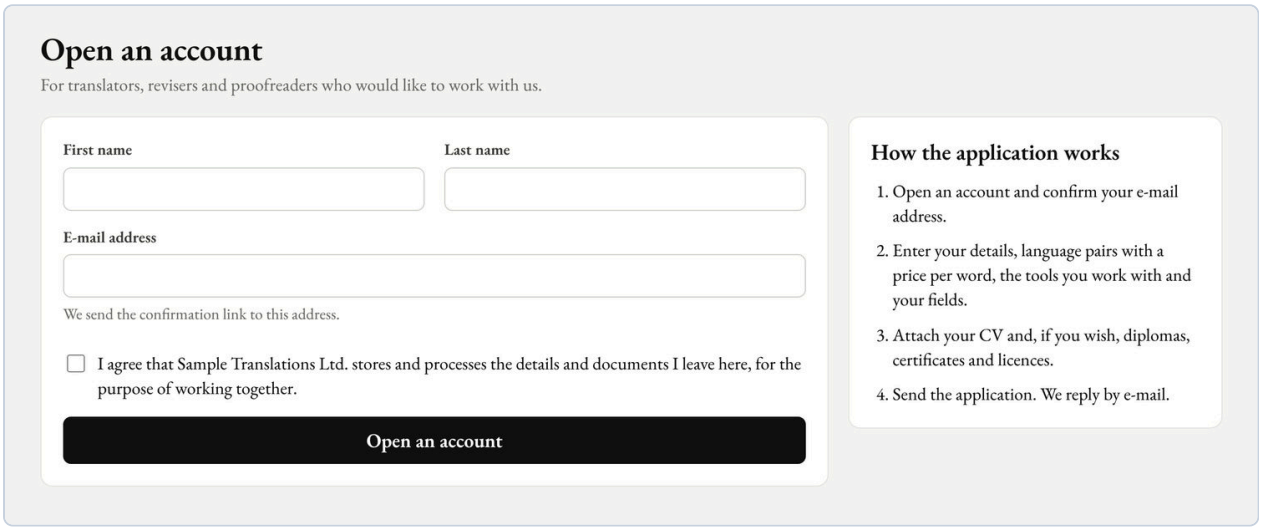
My requests lists all requests of the company. **Company details** shows what the client entered at registration; to change the details they write to your e-mail address for clients. On the same page they change their password. A client who has forgotten the password clicks **Forgot your password?** on the sign-in page and gets a link by e-mail.

12 The translator portal

The translator portal opens at your third address. Translators use it to apply, to accept offers, to get their files and purchase orders, to hand in their work and to see what they have earned.

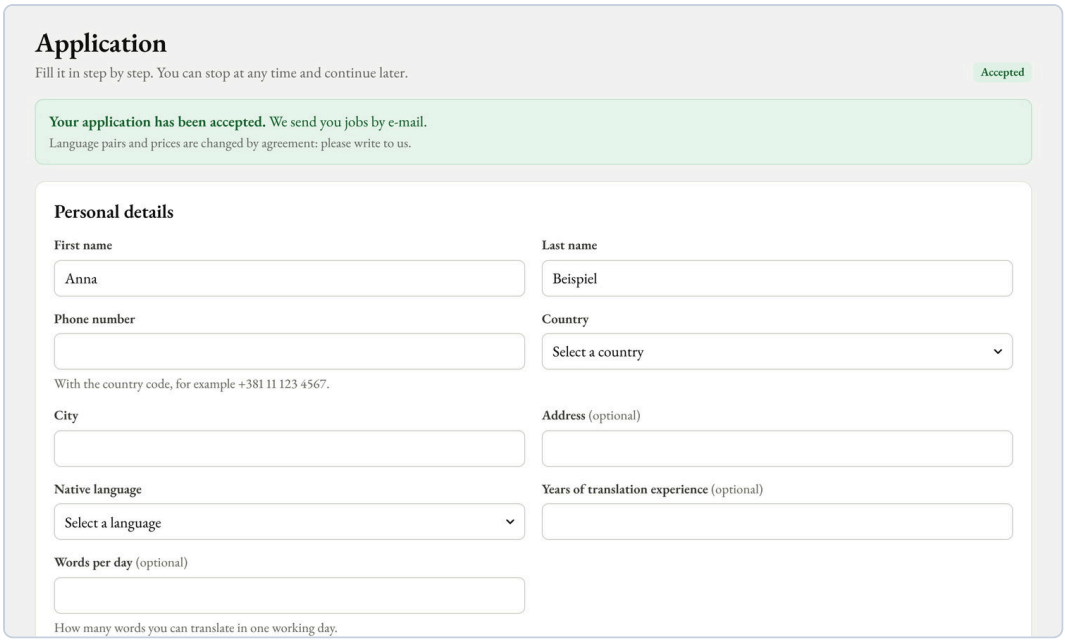
12.1 Opening an account and applying

A translator who wants to work with you clicks **Open an account** on the sign-in page, enters their name and e-mail address and agrees that you store their details. They confirm the address by the link in the message they receive, and set a password there.



Opening an account on the translator portal.

Then they fill in the application, step by step. They can stop at any time and continue later.



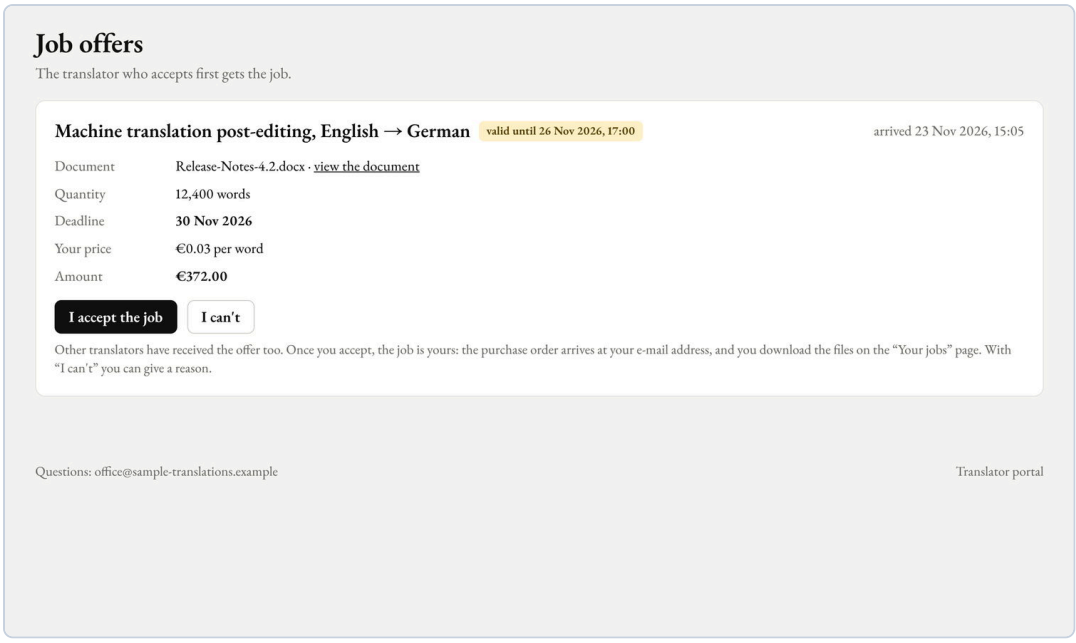
The application form.

Personal details	Name, phone, country, city, native language, years of experience, words per day; whether they work as a freelancer or have their own agency; the payment methods they accept; a cover letter and internships.
Language pairs and prices	Each pair with the type of work and the price per word of the source text, excluding tax.
Tools and fields	The translation tools they work with and the fields they translate.
Documents	A CV is required. Diplomas, certificates, courses and licences are optional. PDF, Word, ODT, RTF, JPG or PNG, up to 20 MB per document.

When they send the application, you get a message and decide (section 8.3). A translator you added yourself does not apply: they get an invitation with their first job and only set a password.

12.2 Job offers

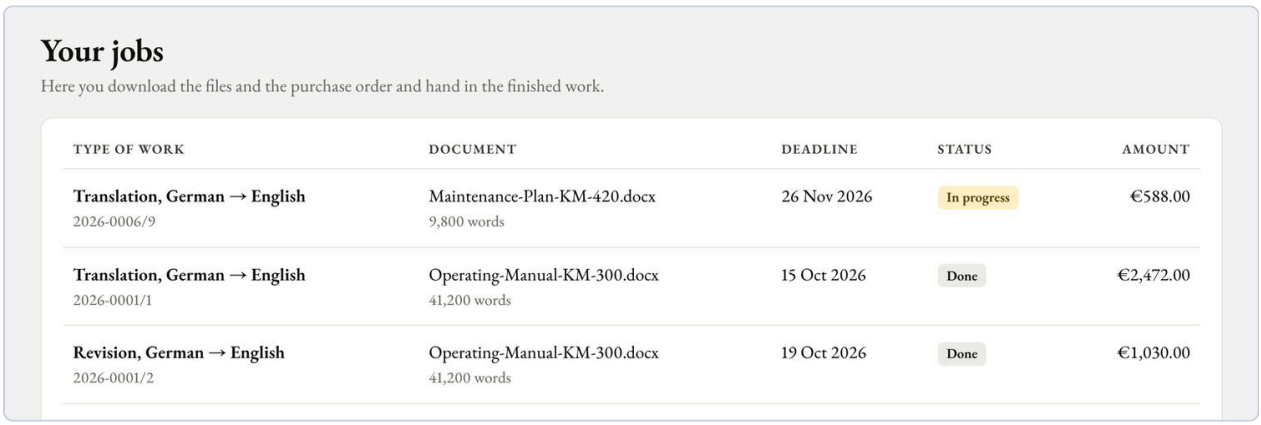
When you offer a job to several translators, each of them gets an e-mail and sees the offer on the page **Job offers**.



A job offer: the document, the quantity, the deadline, the translator's own price and the amount.

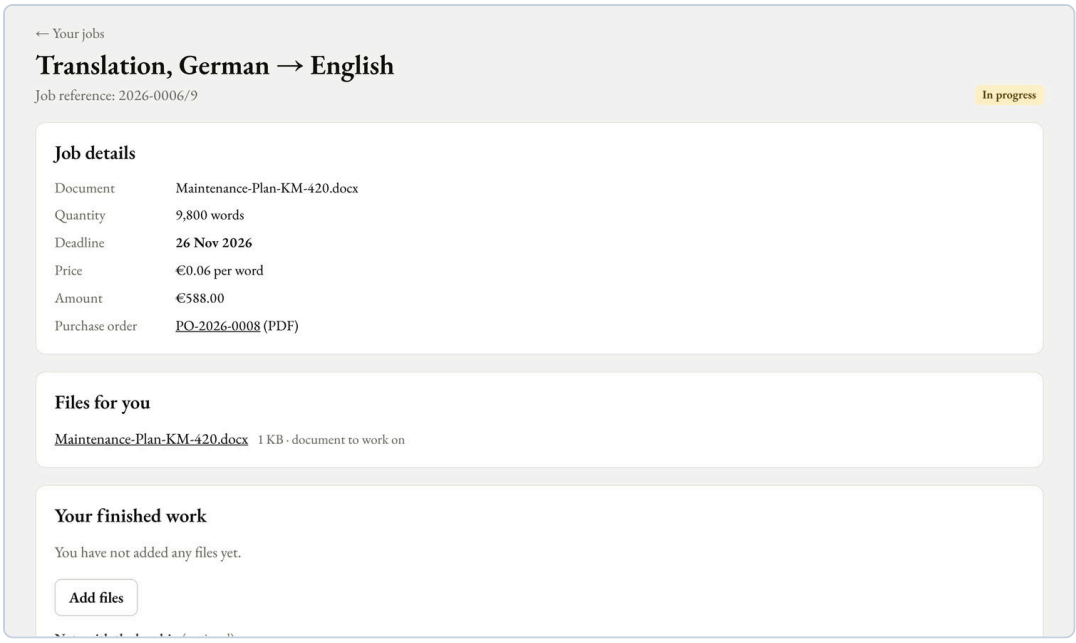
The translator can view the document before deciding. **I accept the job** makes the job theirs: the purchase order arrives by e-mail and the files are on the page **Your jobs**. With **I can't** they decline and can give a reason: busy, the deadline is too short, not their field.

12.3 Jobs



Your jobs on the translator portal.

Your jobs lists all jobs with document, quantity, deadline, status and amount. A job opens on its own page.



One job: the details, the purchase order, the files, and the place to hand in the finished work.

1. Under **Job details** the translator sees the quantity, the deadline, the price and the amount, and downloads the **Purchase order** as a PDF.
2. Under **Files for you** they download the document and anything else you added.
3. Under **Your finished work** they add the finished files, write a note if needed, and click **Hand in the job**.

You get a message, and the job waits for you in the project (section 6.7).

12.4 Statements

The page **Statements** shows the translator's earnings by month, with the status of the payout and the due date. Each month has a PDF with all jobs.



Statements on the translator portal.

A translator who works through their own agency attaches the invoice for the month next to the statement. You see it in the financial report, and the payout is made against it.

Under **Account** the translator changes their password. Language pairs and prices are changed by agreement with you, on the translator's page in the central system.

13 Card payment

If you have an account with the payment provider Paddle, your clients can pay by card on the client portal. This is optional: without it clients pay by bank transfer, as your documents say.

Open **Company → Card payment**. The page first lists what to enter at Paddle: the domain Paddle must approve, the payment page, the notification address, and the two events Paddle sends. Copy these into your Paddle account.

1. Choose the **Mode**: **test** uses Paddle's sandbox and no real money; **live** takes real payments. Test and live use different keys. Try it in test mode first.
2. Enter the three keys from your Paddle account: the **Client-side token**, the **API key** and the **Secret key of the notification destination**. The page says where to find each one. The program keeps the keys and never shows them back.
3. Choose how tax is handled at Paddle and the tax category Paddle approved for your services. If you are not sure, keep the first choice.
4. Click **Save**, then **Check the connection to Paddle**.

What changes for the client and for you

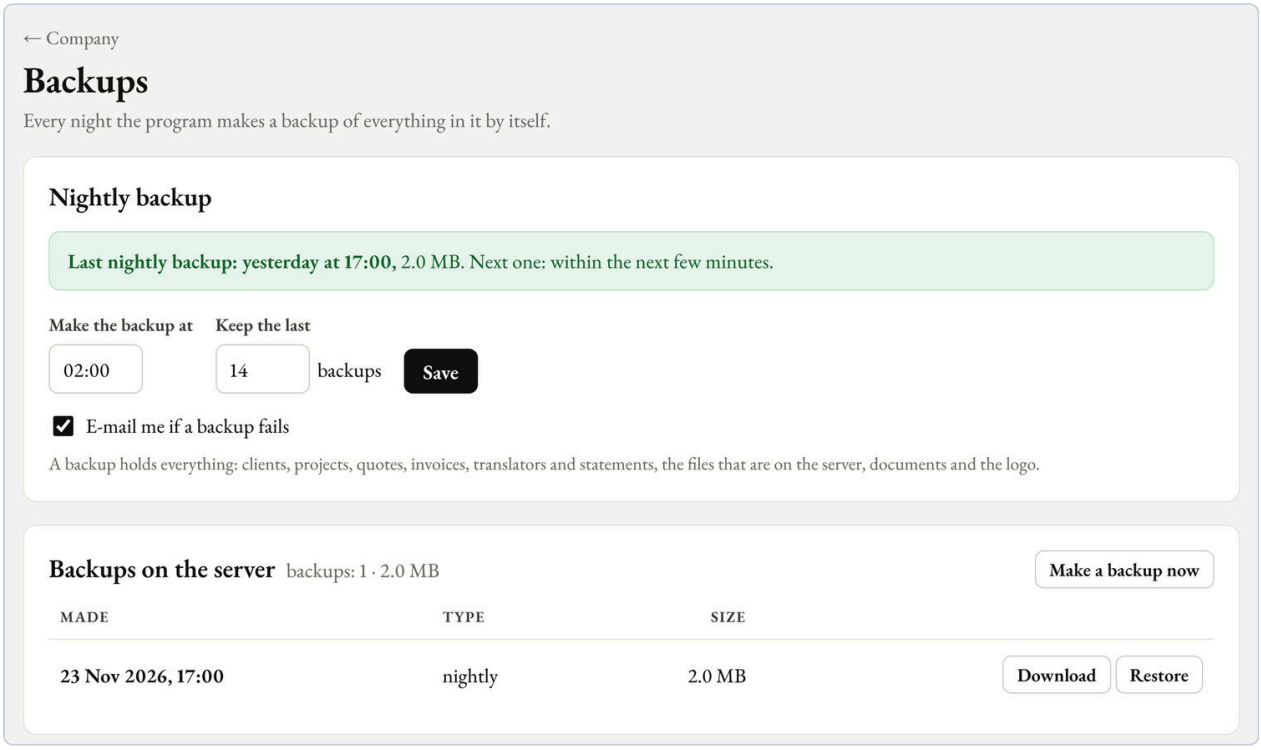
- Clients see the button **Pay by card** on the portal while a project is waiting for payment by quote or proforma invoice, if the quote is in a currency Paddle charges in.
- The program learns from Paddle that the payment was made, records it in the project and sends the client a confirmation. The project page also has the button **Check with Paddle**.
- For a card payment Paddle is the seller towards the client: Paddle issues the invoice to the client and pays you out. The program therefore does not issue an invoice to the client for such a project. You issue your own invoice to Paddle as a manual invoice, under **Invoices**.

14 Looking after the system

The program runs on your server, so its data is in your hands. A few minutes a week are enough to keep it safe.

14.1 Backups

Every night the program makes a backup of everything in it: clients, projects, quotes, invoices, translators and statements, the files on the server, documents and the logo. Open **Company → Backups**.



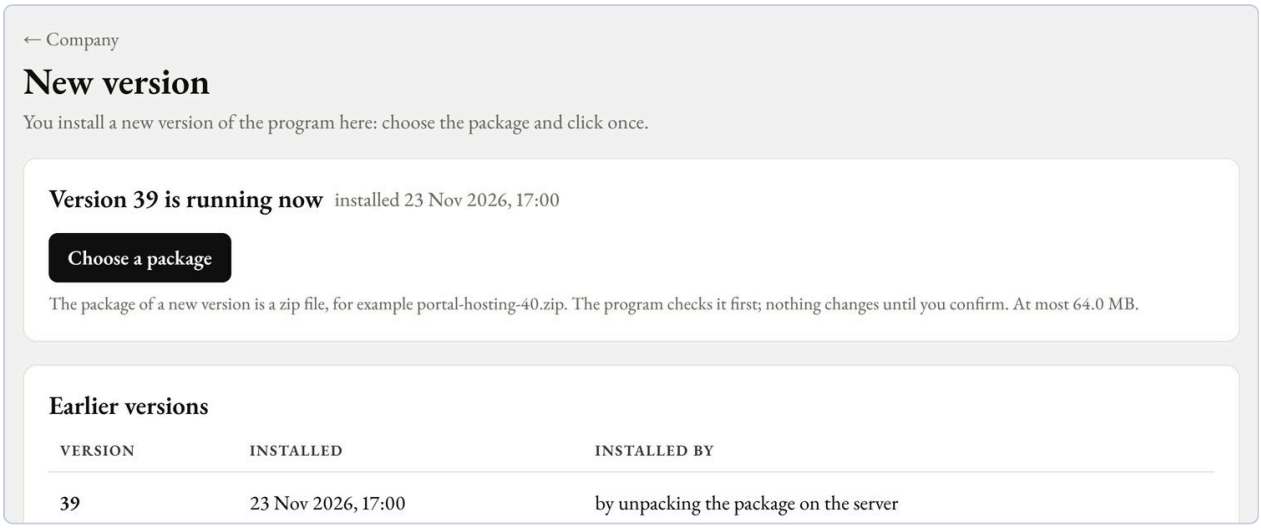
Backups: the nightly backup and the list of backups on the server.

- Set the time of the nightly backup and how many backups to keep. Leave **E-mail me if a backup fails** ticked.
- **Make a backup now** makes one at once, for example before a large change.
- **Download** saves a backup to your computer.
- **Restore** returns the program to the state of that backup. The program first shows what is in the backup; nothing changes until you confirm.

> **Download a backup at least once a week.** The backups are on the same server as the program. If the server fails, they fail with it. A copy on your own computer is the only one that is certainly safe.

14.2 New versions

You receive a new version as a ZIP file and install it from the program itself.



New version: the version running now and the earlier ones.

1. Open **Company → New version** and click **Choose a package**.
2. Click **Check the package**. The program checks the file; nothing changes yet.
3. Click **Install version**.

Before installing, the program makes a backup by itself, marked “before a new version”. If the new version does not start, the program returns the previous one by itself. Your licence and your data stay as they are.

- If the program says it cannot change its own files, extract the ZIP file in the file manager of your hosting, over the existing files. Do not delete anything before that.
- To go back to the previous version later, restore the backup “before a new version” on the **Backups** page.
- The program installs only packages made for it. Use the file you received from us.

14.3 Where your data is

The database and all files are in the *data folder*: next to the web folder, or in a hidden folder inside the program folder that cannot be reached over the internet. The **Backups** page shows the folder in which the backups are kept. Never delete the data folder, and never delete anything in it by hand.

14.4 Moving to another server

1. On the old server make a backup and download it.
2. Install the program on the new server, as described in chapter 2.
3. Open **Company → Backups** and, under **Restore from a file**, choose the backup. A large backup is copied into the backup folder with the file manager instead; the page shows the folder, and the backup then appears in the list by itself.

If the addresses stay the same, your licence stays the same. If they change, ask us for a new licence file first.

14.5 Data transfer

Company → Data transfer moves the set-up, without the work, from one installation to another: the price list, services, translators with their prices, company details and the logo. **Download the file** saves them to one file; **Choose a file** on the other installation loads them, after showing you what is in the file. The file holds no accounts, clients, projects or passwords.

14.6 The log

Company → Log records who did what and when: every sign-in, every document issued, every change. It is written in your company language and cannot be edited.

14.7 A forgotten password or a lost phone

A staff member forgot the password	An administrator opens **Company → Staff**, clicks **change** next to the account and sets a new password.
A staff member lost the phone	They use a backup code. If they have none, an administrator clicks **Turn off the second step** next to their account.
The only administrator is locked out	On the sign-in page click **Forgot your password?**. The program writes a code into the file `KOD-ZA-LOZINKU.txt` in the data folder on the server. Open it in the file manager of your hosting; the code is valid for 30 minutes. With it you set a new password, and the second step is turned off until you turn it on again.
A client or a translator forgot the password	They click **Forgot your password?** on their sign-in page and get a link by e-mail.

15 If something does not work

Most questions have one of a few causes. Find what you see in the left column.

What you see	What to do
Nobody receives messages from the program	Open **Company → E-mail sending**. If it says **Sending is off**, the messages are only kept in the test mailbox. Send a test message; when it arrives, turn sending on.
The test message does not arrive	Check the server address, the port and the connection security with whoever hosts your e-mail account. With accounts such as Gmail, create an "app password" and enter that one.
One message did not reach a client	Open the project and look at **History**: it shows when each message was sent. Ask the client to look in the spam folder.
The Send quote button is not available	The page lists what is missing above the button: statistics for a document, a price for a language pair, or a percentage for a row of the statistics.
The client sees "price in the quote" instead of a price	The service has no price for that language pair. Enter it in the price list.
Reminders, statements or backups are late	The cron job is not running. Look at the card **Regular jobs (cron)** at the bottom of the **Company** page and add the command in your hosting panel.
No reminders are sent at all	Reminders are off until you click **Save and turn on** on **Company → Reminders**.
A new client did not get the confirmation message	The client clicks **Did not get the confirmation e-mail?** on the sign-in page of the portal.
The margin of a project looks too high	A job has no known cost: the translator has no price for that kind of work. Enter it on the translator's page.
This copy is not licensed for this address	You opened the program at an address that is not in your licence. Use one of your three addresses, or ask us for a new licence file.
This copy has no valid licence	The file `licence.php` is missing or was changed. Restore it from the package you received.
An error page right after installation	The reason is written on the page: usually the PHP version or a missing PHP extension. Change it in your hosting panel.

If none of this helps, write to office@traversetranslations.com. Include your licence number, the page you were on, and the message you saw.

16 Where to find what

A short index of the most common tasks.

To do this	Go here
See what has to be done today	**Today**
Accept or reject a request	**Projects** → the project → **Request**
Enter a request for a client	**Projects** → **New project**
Add statistics and send a quote	The project → **Quote**
Record a client's answer or payment	The project → **Quote** or **Proforma invoice**
Assign or offer a job	The project → **Translators**
Deliver a translation	The project → **Delivery**
Answer a complaint	The project → **Delivery**
Issue, correct or find an invoice	The project → **Invoice**; or **Invoices**
Add a client or import clients	**Clients**
Add a translator or change prices	**Translators**
Decide on a translator's application	**Translators** → **Translator applications**
Send statements and record payouts	**Financial report** → **Translators**
Change prices, services or currencies	**Price list**
Change company details, bank account or tax	**Company**
Add a colleague	**Company** → **Staff**
Turn reminders on or off	**Company** → **Reminders**
Download a backup	**Company** → **Backups**
Install a new version	**Company** → **New version**
See who did what	**Company** → **Log**; the project → **History**
Change your password	**Profile**