OCLanguage 7.0 documentation

Contents

| 1. | About OCLanguage | 5 |
|----|-----------------------------------|----|
| 2. | What is CRM | 6 |
| 3. | System configuration management | 7 |
| | 3.1. Session information | 7 |
| | 3.2. Documentation | 15 |
| | 3.3. Technical support | 16 |
| | 3.4. System configuration | 17 |
| | 3.5. User management | 21 |
| | 3.6. Search | 25 |
| | 3.7. Payment methods | 27 |
| | 3.8. Languages | 31 |
| | 3.9. Translation domains | 35 |
| | 3.10. Cities | 39 |
| | 3.11. Programs | 42 |
| | 3.12. Branches | 46 |
| 4. | Finance data management | 50 |
| | 4.1. Sales report | 50 |
| | 4.2. Revenue report | 54 |
| | 4.3. Vendor payments report | 57 |
| | 4.4. Payments to vendors history | 60 |
| | 4.5. Settlements with Customers | 63 |
| | 4.6. Statistics | 66 |
| 5. | System documents management | 74 |
| | 5.1. Invoices | 74 |
| | 5.2. Purchase orders (PO) | 80 |
| | 5.3. Acts of Acceptance | 85 |
| | 5.4. Agreements with Customers | 91 |
| | 5.5. Appendix to agreement | 93 |
| 6. | Customers | 94 |
| | 6.1. How to create a new Customer | 94 |

| | 6.2. How to edit or delete Customer's data | |
|----|--|-----|
| | 6.3. Customers table | |
| 7. | . Project management | |
| | 7.1. How to add a new written translation project | |
| | 7.2. Management of existing project | |
| | 7.3. How to add task | |
| | 7.4. Task type | |
| | 7.5. How to add new pricelist | 115 |
| | 7.6. How to issue appendix to agreement | |
| | 7.7. How to issue invoice for project | |
| | 7.8. How to send invoice to Customer | |
| | 7.9. How to issue Act of acceptance document | |
| | 7.10. How to send Act to Customer | |
| | 7.11. Discount management | |
| | 7.12. How to save payment to vendor | |
| | 7.13. How to save incoming funds from Customer | 146 |
| | 7.14. How to issue PO document for vendor | |
| | 7.15. How to send PO to vendor | 153 |
| | 7.16. How to add a new oral translation project | |
| | 7.17. How to add new task to oral translation project | |
| | 7.18. Project table | |
| 8. | . Vendor management | |
| | 8.1. How to add translator | |
| | 8.2. How to edit translator's data | |
| | 8.3. How to use autonomic payment rates for translator | |
| | 8.4. Translators rating and feedback | |
| | 8.5. Translators statistics | |
| | 8.6. Translators schedule | |
| | 8.7. Translators document management | |
| | 8.8. Translators table | |
| | 8.9. CV of translator | |
| | 8.10. How to add notary | |
| | 8.11. How to edit notaries' data | |

| 8.12. Notaries table | |
|---|--|
| 8.13. How to add designer | |
| 8.14. How to edit designer's data | |
| 8.15. Designers table | |
| 9. E-mails | |
| 9.1. System automatized e-mails | |
| 9.2. Work with macros | |
| 9.3. Customer and Translators templates | |
| 10. System requirements | |
| 10.1. General information | |
| 10.2. Software | |
| 10.3. Hardware | |
| 10.4. Data storage | |

1. About OCLanguage

The idea of developing a single platform for supervising translation agency management process was born in Riga (year 2007). SIA "OCL" worked 2 years in close cooperation with a few European translation agencies to release first version of the software in 2009. Today our system is one of the most popular solutions in the world, having a lot of unique features to cope with translation agency tasks. OCLanguage consists of CRM, project and vendors' management, sales and statistics reports and wide set of business monitoring features.

The solution is based on Web technologies, which allows users to access the system any time from any location. OCLanguage is recognized as user-friendly, easy to modify and reliable solution for TAs. Today OCLanguage has Customers and partners in CIS and CEE regions. The main course of action is selling one time purchase solution along with the modification of it according to every TA needs. As well, Customers tend to purchase the system as Software-as-a-service (SaaS) solution.

OCLanguage is a warranty for those who value efficiency, strive for innovations and seek for business processes improvements on daily basis.

Our vision – we will be recognized as a leading software solutions supplier for Translation Agencies worldwide.

Our strategy is based on the following cornerstones:

- 1. we are a company with a Customer driven approach;
- 2. we collect the ideas from our Customers to add new system modules, which ensures that OCLanguage has translation business specific functionality only;
- 3. our outstanding experience and striving for perfection allows us to deliver maximum value of OCLanguage solution to every Customer.

2. What is CRM

CRM (Customer Relationship Management) – corporate information system, which is purchased with a purpose to improve quality of services, to optimize marketing activities and increase sales revenue. Companies are looking for solution that would allow to save money, but increase efficiency. Let us emphasize just a few benefits of CRM system:

- 1. CRM system has full information about the Customer this allows management to allocate proper amount of resources for handling particular tasks
- 2. CRM system represents tool for managing marketing related data analysis and actions planning
- Automatized sales process automatic operations management and control over orders being processed
- 4. Continuous analysis of cooperation with Customers setting priorities, based on importance and weight of action impact on the company
- 5. Decreased response time to quote requests
- 6. Contact management
- 7. Time management
- 8. Reporting for top management and human resources management
- 9. Integration with third-party systems etc.

OCLanguage has all aforementioned CRM features, besides that it represents the tool with many unique translation management features, which lead to finance and time savings and increased profitability. All orders in system are handled according to OCLanguage workflow, which includes translation quality management and one-click translated document-sharing option with Customers.

3. System configuration management

3.1. Session information

After logging into the system, one can browse user information by clicking on "User" icon. The system will reveal the following data:



When clicking each of options, the system opens the specific section.

1. Profile

In this section the user can do the following:

- change e-mail address;
- set a new password;
- change his avatar.

! Please note that fields in grey color are not editable.

| My data Main⇒Users⇒ My data | |
|--------------------------------|----------------------------|
| Karlis | |
| Position | |
| Login name | Karlis |
| E-mail | karlis.lucs@oclanguage.com |
| Password | |
| Repeat password | |
| Picture | |
| | Save |

2. Private messages

In this section the user can do the following:

• Create a new message by clicking "Send a message".



Start typing user name and the system will reveal all usernames that have typed letters:

| Private messages | | | | | | | | | |
|------------------------|-----------------------------------|----------------|------------------|------------|------|--------|--------------|---------|---|
| Main > Private message | Main > Private messages | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| Recipient | Alex | | | | | | | | |
| | Alexander | | | | | | | | |
| Subject | | | | | | | | | |
| ⊁ ▼ B | I U x ² x ₂ | § Ø | Helvetica Neue 🔻 | A - | ≡)≡ | ∎. Ti. | ■ ▼ 9 | - × | ? |

Click "Send" to send a message to the recipient.

| Private messages | | | | | | | |
|---------------------------------------|---|--|--|--|--|--|--|
| Recipient | Alex | | | | | | |
| Subject | Urgent task | | | | | | |
| ⊁ - B I <u>U</u> | x ¹ x ₁ \oplus \mathscr{F} "OpenSer"- A - \equiv \equiv Ξ - \square - Θ Θ \square - X \bigcirc ? | | | | | | |
| Here is <mark>urgent task</mark> to o | ope with. | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | Send | | | | | | |

• Review the message list

Once a new message is received, you will see a notification in the control panel.



Click on the message icon to open the message.

Click "Show all messages!" to view the message list.

| Private messages Main > Private messages | | | | | | | | | |
|---|------------------------|----------------|------------------|--|--------|--|--|--|--|
| Acti | on 👻 OK Send a message | | | | Search | | | | |
| | Subject | Sender | Time | | Status | | | | |
| | test | Jegorovs Olegs | 10.06.2017 12:53 | | | | | | |
| | Good morning | Alexander | 10.06.2017 12:04 | | New | | | | |

User can filter data in the Messages database by using 3 methods:

1. Type letters or numbers in "Search" field and click "Enter"

| Private messages | | | |
|---|--------|------------------|--------------------|
| Main > Private messages | | | |
| Action - OK Send a message | | | ₩ ▼ 65-0002 |
| Subject | Sender | Time | Status |
| Additional details required for project 65-0002 | Rarlis | 28.06.2017 18:56 | New |

The System searches for the messages according to message name and content.

! Please note that data filter can be removed by deleting text in "Search" field and clicking "Enter".

2. Filter data by sorting data from A to Z and vice versa by clicking on a column name.

| Priva | ate messages | | | |
|-----------|---|--------|------------------|-------------------|
| Main > Pr | vate messages | | | |
| Ac | tion CK Send a message | | | Ⅲ ▼ Search |
| | Subject | Sender | Time 🔺 | Status |
| | Additional details required for project 65-0002 | Karlis | 28.06.2017 18:56 | New |
| | Remove Daria from recipients list | Karlis | 28.06.2017 18:58 | New |

3. Review the columns that you want to see in the Messages table. To add or remove particular column from the table, simply click and select the columns that you want (or do not want) to view in the Messages database. This feature is especially relevant if there are big databases with many columns and/or relatively small monitor/tablet/smartphone screen.

! Please note that the system will save these settings for upcoming user sessions.

| Private messages Main > Private messages | | | |
|---|--------|----------|---|
| Action - OK Send a message | | | HI - Search |
| Subject | Sender | Time | ✓ Subject ✓ Sender |
| Remove Daria from recipients list | Karlis | 28.06.20 | Sender Time Status |
| Additional details required for project 65-0002 | Karlis | 28.06.20 | 017 18:56 |

• In order to delete a message, mark the message that you would like to delete, click "Action", choose "Delete" and click "OK".

| Private messages Main > Private messages | | | |
|---|----------------|------------------|------------|
| | | | |
| Action CK Send a message Mark as read | | | Search |
| Delete | Sender | Time | Status |
| 🕑 test | Jegorovs Olegs | 10.06.2017 12:53 | |
| Good morning | Alexander | 10.06.2017 12:04 | New |

• In order to mark a message as read, mark the message that you wouldn't like to open, but mark as already read, click "Action", choose "Mark as read" and click "OK".

| Priv | ate messages | | | |
|--------|------------------|----------------|------------------|-------------------|
| Main ⇒ | Private messages | | | |
| | Itark as read | | | Ⅲ ▼ Search |
| | elete | Sender | Time | Status |
| | test | Jegorovs Olegs | 10.06.2017 12:53 | |
| | Good morning | Alexander | 10.06.2017 12:04 | New |

3. Personal settings

Click "Personal settings" and the system will automatically open the OCLanguage interface configuration window (in the middle of desktop).

| OCLanguage 7.0 | | | Animations | Aside | Color Themes | | English language Karlis | |
|-----------------------|--------------------|---------------|---|---|--------------|---------|-------------------------|---|
| Navigation | D | | Enable Animations | Visible | | | A Profile | |
| 🛱 Projects | Proj Main > Pro | | Transition effects ease (Default) | Fixed Aside on the left side | | | Private messages | |
| 🖻 Customers | | | | Bright Theme | | | Personal settings | |
| 😰 Translators | De | lete Add proj | | | | | 🕜 Help | |
| 🖌 Designers | | | Navigation — | Header / Navbar | | | 🔒 Lock screen | |
| 🔦 Notaries | | Project | Fixed Collapsed | Fixed | | Custor | 😔 Logout | t |
| Documents > | | 90-001 | | Footer | • | Smith J | | _ |
| Accounting > | | 65-001 | Off Canvas Navigation | Fixed | | SIA OCL | Karlis | |
| ull Management > | | 95-007 | Select Mode 👻 | | | МТИ | Jegorovs Olegs | |
| 🖈 Mailing templates 🛛 | | 95-002 | | | | МТИ | Jegorovs Olegs | |
| ⊊ Configuration → | | 95-008 | * All settings will be saved automatically. | | | МТИ | Jegorovs Olegs | |
| | | 95-003 | Restore Default Settings | | | МТИ | Jegorovs Olegs | |

! Please note that every user sets his own interface settings. Click "Restore default settings" to return to the initial interface settings.

| Animations | Aside | Color Themes |
|---|--|--------------|
| C Enable Animations Transition effects ease (Default) | Visible Fixed Aside on the left side Bright Theme | |
| Navigation Fixed Collapsed | Header / Navbar | |
| Off Canvas Navigation Select Mode | Fixed | |
| * All settings will be saved automatically. | | |

4. Help

By clicking "Help" OCLanguage automatically opens its Documentation portal, from where you can download either specific part of the user manual or download full manual in one document.

| Support +371 26-07-56-84 | | | | | | |
|--------------------------|----------------------|------------|--------------------|------------------|--|--|
| - CO | inguage | HOME | FEATURES CUSTOMERS | PRICING CONTACTS | | |
| | Docu | mentation | | | | |
| | | | Quick search | | | |
| Nr | Title | Date | Size | | | |
| 1. | About OCLanguage | 22.10.2015 | 202.61 KB | PDF | | |
| 2. | What is CRM | 22.10.2015 | 199.72 KB | PDF | | |
| 3.1 | Session information | 22.10.2015 | 213.01 KB | PDF | | |
| 3.2 | Documentation | 22.10.2015 | 207.83 KB | PDF | | |
| 3.3 | Technical support | 22.10.2015 | 212.13 KB | PDF | | |
| 3.4 | System configuration | 22.10.2015 | 363.87 KB | PDF | | |
| 3.5 | User management | 22.10.2015 | 366.13 KB | PDF | | |

To download a document click on the PDF icon (the system will download the .pdf file to your computer).

| | Inguage | | HOME | FEATURES | CUSTOMERS | PRICING | CONTAG |
|----|---------|-----------------------|------|----------|--------------|-----------|--------|
| | | | | TENTONES | COSTOMERS | - Hicking | contra |
| | Decu | una a la tratia la la | | | | | |
| | Docu | imentation | | | | | |
| | Docu | imentation | | | Quick search | | |
| Nr | Title | imentation | Date | | Quick search | | |

Use "Quick search" form to find the needed document by writing key words. The System will automatically provide all documents, whose names contain key word(s).



Documentation

| | | | Invoice | |
|------|---|------------|-----------|-----|
| Nr | Title | Date | Size | |
| 5.1. | Invoices | 22.10.2015 | 213 KB | PDF |
| 7.8. | How to issue invoice for all project | 22.10.2015 | 479.67 KB | PDF |
| 7.9. | How to issue invoice for selected project tasks | 22.10.2015 | 562.54 KB | PDF |

5. Lock screen

1

Click "Lock screen" to lock your workstation.

Unlock it by submitting a password and clicking "Log in".



3.2. Documentation

User can browse documentation locally via software interface or via our website (<u>www.oclanguage.com/documentation</u>). Besides the documentation portal, a user can download the system documentation via OCLanguage interface.

To download the system documentation log in into OCLanguage and browse User details -> Help.

| OCLanguage 7.0 | ≡ ⊠ ♣ | English language Karlis |
|----------------|---|-------------------------|
| Navigation | Translators | Profile |
| 🛱 Projects | Main > Translations | Private messages |
| 💼 Customers | | 🏟 Personal settings |
| 🞓 Translators | Delete Add translator | 😧 Help |
| 🖌 Designers | | Lock screen |
| 🔦 Notaries | Name, surname / Photo Type Company name Address Available Languages | 🕞 Logout |
| | | / STITIN TN/ |

3.3. Technical support

OCL is a Customer-driven Company always available for addressing inquiries from its Customers.

Our Customers can benefit from dedicated technical support package that one can rent as a service. See more information <u>here</u>.

3.4. System configuration

To open system configuration, click "Configuration" -> "System settings" on the Navigation pane.



By default, system has one main configuration.

See the description below, where the data of system configuration are used.

| Field | Description |
|---------------------------|--|
| Name | Name of particular configuration |
| Administrative e-mail | E-mail for receiving system notifications |
| ICQ number | ICQ number (for information purpose) |
| Skype username | Skype username (for information purpose) |
| Domain name | Server authorization name |
| Company name | Company name (included in Acts of acceptance) |
| Registration No. | Company registration No. |
| Name (in English) | Company name in English |
| Legal address | Legal address |
| Actual address | Actual address |
| Legal address in English | Legal address in English |
| Actual address in English | Actual address in English |
| Bank name (requisites) | Bank name (used for system documents) |
| Bank account (requisites) | Bank account number (used for system |
| | documents) |
| Contact details | Contact details (used for system documents) |
| Payment details | These data are used in e-mail templates (under |
| | section Mail). You might want to contact a Support |
| | team to discuss this functionality. |
| Country | Country name |
| Currency | Currencies that a translation agency operates with |
| | (will be revealed in system documents) |
| VAT | Default VAT rate |
| Primary language | System interface language, that OCLanguage will |
| | have by default |
| Status | Status of the configuration. At one time only one |
| | configuration can be primary. |

After all fields are filled, click "Save".

| Country | RUSSIAN FEDERATION |
|------------------|--------------------|
| Currency | RUR 🛠 USD 🛠 EUR 🏵 |
| VAT | 18% |
| 101 | |
| Primary language | Русский язык 🔻 |
| Status | |
| | |
| | Save Delete |

In general view of the System settings, you can see all system configurations. The one with a checkmark is considered as primary system configuration.

| System settings | | | | | | |
|--------------------------|--|--------|--------------|--------|--|--|
| Main > System settings | | | | | | |
| Delete Add configuration | | | | | | |
| | | | III • | Search | | |
| Name | | Status | | | | |
| The main configuration | | Active | | | | |

Click on "The main configuration" to review the system configuration data.

| System settings | | |
|-------------------------------|---------|--------|
| Main > System settings | | |
| Delete Add configuration | | |
| | | Search |
| Name Status | | |
| | | |
| The main configuration Active | | |

In order to delete particular configuration, check the box next to configuration that you want to delete and click "Delete".



Click "Add configuration" to add a new system configuration.

| /stem settings > System settings | | | |
|-------------------------------------|--------|------------|--------|
| Delete Add configuration | | Ⅲ ▼ | Search |
| Name Name | Status | | |
| The main configuration | Active | | |

OCLanguage allows to have not one, but several system configurations. This might be a relevant option if the user wants to issue the system documents from different Legal names.

3.5. User management

To open system configuration click "Configuration" -> "Users" on the Navigation pane.



In the table below you will see the description of each field in users' data.

| Field | Description |
|--------------------------------|--|
| Login | Set username for the manager |
| Name | Name of the manager |
| Surname | Surname of the manager |
| Patronymic name | Patronymic name of the manager |
| E-mail | E-mail address of the manager |
| Position | Position of the manager |
| Password | Password |
| Repeat password | Repeat password |
| Branches | By marking branch you assign this manager to be able to work with the Customers belonging to a particular branch |
| Rights | Grant rights for particular actions |
| Administration rights | Administrator rights grant full privileges in the system (access to all system sections and all three rights described below |
| Signature authority | Manager is authorized to sign system documents |
| Rights to add a client manager | User is allowed to add a manager taking care of the Customer (in Client data) |

| Right to delete financial transactions | Manager is allowed to delete the records in |
|--|---|
| | Payments and Income sections |
| Access | Administrator is able to grant access to any of the |
| | system sections. Leave particular "Access" field |
| | empty to prevent the user from access to the |
| | system section. |

After all needed fields are filled, click "Save".

- Access to "Programs" section
 Access to "Branches" section
- Access to "Statistics" section
- Access to "System configuration" section
- Access to "Settlements with Customers" section

In general view of Users you can see all user accounts. The column "Active" shows which user accounts are active, which means that the user is able to log in into OCLanguage and proceed with actions.

| ser | ſS | | | | | | | | |
|--------|--------------|-------------------------------|---------------|---------------------|-----------------|---------------------------------|------|--------------------------|---------------|
| > User | irs | | | | | | | | |
| Dele | ete Add user | | | | | | | | |
| | | | | | | | | Search | |
| | | | | | | | | | |
| _ | Login | Туре | Name | Surname | Patronymic name | Position | Auth | ority for signing | Active |
| | OCLanguage | Type Administration | Name Olegs | Surname Jegorovs | Patronymic name | Position Главный разработчик | Auth | ority for signing Yes | Active Yes |
| | - | | | | Patronymic name | | Auth | | |

Click any place on the text to browse User data.

| ser | S | | | | | | | | |
|-------|------------------|-------------------------------|---------------|---------------------|-----------------|---------------------------------|--------------------|------------|---------------|
| > Use | rs | | | | | | | | |
| Del | ete Add user | | | | | | | Search | |
| | | | | | | | | | |
| | Login | Туре | Name | Surname | Patronymic name | Position | Authority f | or signing | Active |
| | Login OCLanguage | Type Administration | Name Olegs | Surname Jegorovs | Patronymic name | Position Главный разработчик | Authority f Yes | or signing | Active Yes |
| | | | | | Patronymic name | | - | or signing | |

In order to delete a particular User, check the box next to the configuration that you want to delete and click "Delete".

| ser | S | | | | | | | |
|-------|--------------|-------------------------------|------|---------------------|-----------------|---------------------------------|-----------------------|---------------|
| > Use | 75 | | | | | | | |
| | | | | | | | | |
| Dele | ete Add user | | | | | | | |
| | | | | | | | | |
| | | | | | | | Search | |
| | Login | Туре | Name | Surname | Patronymic name | Position | Authority for signing | Active |
| | Login | Type Administration | Name | Surname Jegorovs | Patronymic name | Position Главный разработчик | | Active Yes |
| _ | - | | | | Patronymic name | | Authority for signing | |

Click "Add new user" to add a new system user account.

| Usei | rs | | | | | | | | |
|------------|---------------|------|------|---------|-----------------|----------|--------------|--------|--------|
| Main → Use | ers | | | | | | | | |
| | | | | | | | | | |
| De | lete Add user | | | | | | | | |
| De | Add user | | | | | | III • | Search | |
| De | Login | Туре | Name | Surname | Patronymic name | Position | Ⅲ ▼ | | Active |

User can filter data in the System users database by using 3 methods:

1. Type letters or numbers in "Search" field and click "Enter"

| Usei | ſS | | | | | | | |
|------------|---------------|----------------|-------|-------------|-----------------|----------|-----------------------|---------------------|
| Main > Usi | irs | | | | | | | |
| | lete Add user | | | | | | | Ⅲ ▼ Director |
| | Login | Туре | Name | Surname | Patronymic name | Position | Authority for signing | Active |
| | oclanguage_1 | Administration | llya | Ponomarenko | Vladimirovitsch | Director | No | Yes |
| | oclanguage_10 | Administration | Игорь | | Валерьевич | Director | No | Yes |

Below you will see a list of parameters (column names) the system searches data for:

- Login
- Name
- Surname
- Patronymic name

oclanguage 102

Administration

Maria

Veretina

• Position.

! Please note that data filter can be removed by deleting the text in "Search" field and clicking "Enter".

| 2 | . Filter data b | y sorting d | ata from | n A to Z an | d vice versa l | oy clicking on the | colur | nn na | ame. | |
|------------|-----------------|----------------|----------|-------------|-------------------|--------------------|-------|------------------|--------|--------|
| User | ſS | | | | | | | | | |
| Main > Use | rs | | | | | | | | | |
| De | ete Add user | | | | | | | | | |
| | | | | | | | | III • | Search | |
| | Login | Туре | Name | Surname | Patronymic name 🔻 | Position | Autho | ority for s | igning | Active |
| | | Administration | Олег | Егоров | Владимирович | Support | | Yes | | Yes |
| | oclanguage_10 | Administration | Игорь | | Валерьевич | Director | | No | | Yes |

3. Review the columns that you want to see in the System users table. To add or remove a particular column from the table, simply click and select the columns that you want (or do not want) to view in the users database. This feature is especially relevant if there are big databases with many columns and/or relatively small monitor/tablet/smartphone screen.

Yurevna

CFO

Yes

| Ser ⇒ User | | | | | | | | |
|---------------|--------------|----------------|-------|-------------|---------------------|---------------|---|-----|
| Dele | te Add user | | | | | | Ⅲ ▼ Search | |
| | Login | Туре | Name | Surname | Position | Authority for | 🗹 Login | |
| | OCLanguage | Administration | Olegs | Jegorovs | Главный разработчик | Yes | ✓ Type ✓ Name | |
| | admin | Administration | Admin | Admin | Admin | Yes | Surname | |
| | oclanguage_1 | Administration | llya | Ponomarenko | Director | No | Position Authority for signing | |
| | oclanguage_2 | Administration | | | CEO | Yes | Active | Yes |

! Please note that the system will save these settings for upcoming user sessions.

3.6. Search

Use "Search" section, which is located above the table, to filter data. In order to filter the needed data you will have to fill in the data or choose from the available options.

There is documentation of search options in every section related to the database (vendors, Customers, Invoices etc.).

Click "Search" button to initialize a search process.

| Income Main > Income | | |
|-------------------------|----------------------------------|------------|
| Date from | 07.03.2017 | |
| Date to | 18.03.2017 | *** |
| Payment method | Bank account | • |
| Manager | Ponomarenko Ilya Vladimirovitsch | • |
| | | |
| | | Search |

In every table the user can filter data according to the column. Click the column name to sort all data according to the particular column.

| esi ⇒ Desi | gners | | | | | |
|---------------|----------------|----------|--|-------------|-------------------|-----------|
| Dele | ete Add design | ner | | • | ∎ - Search | |
| | Name | Surname | Address | Pages/day 🗸 | Price | Status |
| | Алина | Исаева | Театральная площадь, д. 5, корп. 2, Москва | 9.0 | 6.50 | Available |
| | Ольга | Букина | Москва, ул. Ладожская, 1/2, стр. 1, 3/4 | 9.0 | 6.00 | Available |
| | Anna | Wooden | Victoria Place, 115 Buckingham Palace Rd, London SW1W 9SJ, | 8.0 | 6.00 | Available |
| | Екатерина | Лисунова | Москва, улица Дорогомиловская Б., 8а | 7.0 | 7.00 | Available |

Use fast search function to type in letters, numbers or words for immediate search of the information.

| Desi | igners | | | | | | |
|-----------|-------------|---------|---------|-----------|--------------------|--------|------|
| Main → De | signers | | | | | | |
| | | _ | | | | | |
| De | lete Add de | signer | | | | | |
| De | lete Add de | signer | | | Ⅲ ▼ | London | |
| De | lete Add de | surname | Address | Pages/day | ₩. . Pri | | atus |

! Please note that you can use Search option and Fast search option afterwards, if needed. However, if you will process Fast search request and after this fill in a parameter in any of the Search fields, the system will drop down a Fast search parameter, but use only Search information.

Use drop down option to check the columns, which you want to be revealed in the table. Unchecked columns will be hidden. User can always browse a full table by simply checking all columns.

| esi | gners | | | | |
|---------|----------------|---------|--|-----------|---|
| n > Des | igners | | | | |
| | | | | | |
| Del | ete Add design | ner | | | |
| | | | | | ₩ - Search |
| | Name | Surname | Address | Pages/day | |
| | Anna | Wooden | Victoria Place, 115 Buckingham Palace Rd, London SW1W 9SJ, | 8.0 | ✓ Surname✓ Address |
| | Алина | Исаева | Театральная площадь, д. 5, корп. 2, Москва | 9.0 | ✓ Pages/day ✓ Price |
| | | | | | |

3.7. Payment methods

To open the system configuration click "Configuration" -> "Payment methods" on the Navigation pane.



Payment methods table data contains all payment services that a translation agency works with. Payment methods are revealed in the following system sections:

- Translator's data
- Customer payment data
- Project data (under Tasks section)
- Payment section
- Income report.

To add a new payment method click "New payment method".



In the table below you can see the description of fields related to payment methods.

| Field | Description | | | |
|-------------------------|---|--|--|--|
| Name | Name of payment method | | | |
| Туре | Choose payment type between "Bank" and | | | |
| | "Electronic money" | | | |
| Requisite fields (name) | Bank Identifier Code | | | |
| Correspondent account | Specify the name of requisite field (for example, | | | |
| | SWIFT code, WMID etc.) once this is saved, all of | | | |
| | these fields will appear in the translator's data. | | | |
| Additional information | Fields for additional information to be stored in | | | |
| | payment method details, for example: | | | |
| | Name: home site | | | |
| | Value: <u>www.hsbc.com</u> | | | |
| Fields details | Field setup for translators' payment data, for | | | |
| | example, field name might be Card account, | | | |
| | Ledger account, SWIFT and once this is saved, all | | | |
| | of these fields will appear in the translator's data. | | | |
| The order of display | Priority of revealing payment methods. 1 $-$ | | | |
| | highest priority (reserves 1 st place in the list of | | | |
| | payment methods) | | | |
| Status | Check this box to include a payment method in the | | | |
| | translator's data. | | | |

After fields are filled, click "Save".

| Priority | 1 | | • |
|----------|---|--|---|
| Status | ~ | | |
| | | | |
| | | | |



In general view of the payment methods you can see all methods of payment. The column "Order of display" shows the priority of revealing all payment methods, one after another.

| - | nent method | | | |
|------|-----------------------|------------------|----------|------------------|
| Dele | te Add payment method | | | Ⅲ→ Search |
| | Name | Туре | Priority | Status |
| | Bank account | Bank transfer | 1 | Active |
| | Moneybookers | Electronic money | 1 | Active |
| | Webmoney | Electronic money | 1 | Active |
| _ | Yandex Money | Electronic money | 1 | Active |

Click on the text to browse the Payment method data.

| Payment method | | | | |
|--|------|----------|--------------|--------|
| Main > Payment method | | | | |
| | | | | |
| Delete Add payment method | | | | |
| Delete Add payment method | | | Ⅲ ▼ | Search |
| Delete Add payment method Name | Туре | Priority | ₩ - State | |

In order to remove a particular Payment method, check the box next to the payment method that you want to delete and click "Delete".

| | Payment method Main > Payment method | | | | | | |
|------|---|------------------|----------|------------|--------|--|--|
| Dele | Add payment method | | | Ⅲ ▼ | Search | | |
| | Name | Туре | Priority | Stat | us | | |
| | Bank account | Bank transfer | 1 | | Active | | |
| | Moneybookers | Electronic money | 1 | | Active | | |

User can filter the data in the Payment methods database by using 3 methods:

1. Type letters or numbers in "Search" field and click "Enter"

| Paym Main > Paym | ent method | | | |
|---------------------|----------------------|------------------|----------|-------------------|
| Delet | e Add payment method | | | Ⅲ ▼ PayPal |
| | Name | Туре | Priority | Status |
| | PayPal | Electronic money | 1 | Active |

The system searches payment methods according to the payment method name only.

! Please note that data filter can be removed by deleting the text in the "Search" field and clicking "Enter".

2. Filter data by sorting data from A to Z and vice versa by clicking on the column name.

| Payment method Main > Payment method | | | | | | |
|---|-------------------------|-----------------------|--------------------|------------------|--|--|
| Del | lete Add payment method | | | Ⅲ→ Search | | |
| | | | | | | |
| | Name 🔺 | Туре | Priority | Status | | |
| | Name 🔺 Bank account | Type Bank transfer | Priority 1 | Status | | |
| | | | Priority 1 1 | | | |

3. Review the columns that you want to see in the Payment methods table. To add or remove a particular column from the table, simply click and select the columns that you want (or do not want) to view in the Payment methods database. This feature is especially relevant, if there are big databases with many columns and/or relatively small monitor/tablet/smartphone screen.

! Please note that the system will save these settings for upcoming user sessions.

| Payment method Main > Payment method | | |
|---|------------------|-------------------|
| Delete Add payment method | | Ⅲ ▼ Search |
| Name Name | Туре | Status 🖉 Name |
| Bank account | Bank transfer | A Priority |
| Moneybookers | Electronic money | A Status |

3.8. Languages

A system user defines which languages will be included in the list of languages throughout all system (translator, project data).

To open the system configuration click "Configuration" -> "Languages" on the Navigation pane.



The system includes the majority of languages used worldwide. A user can NOT add a language by himself. If addition is needed, a user should apply for support from OCLanguage developers.

Click on the text to browse Languages data.

| Lá | angua | ges | | | | | |
|------|-----------|----------|------|-----------|-------|--------------|--------|
| Mair | Languages | | | | | | |
| | | | | | | | |
| | | | | | | III • | Search |
| | Code | RU | EN | UA | LV | | Status |
| | AAR | Афарский | Afar | Афарський | Afāru | | Active |

In the table below you will see the description of the fields related to language description.

| Field | Description | | |
|-------------------|---|--|--|
| Code | Pre-defined language code standards | | |
| EN, RU, LV, UA | Translation of each language into OCLanguage system interface languages | | |
| Stirring (active) | Check this box if you wish to include this language | | |
| | in language list | | |

After the fields are filled, click "Save".

| AAR | |
|----------------------------|-----------|
| Main > Languages > Editing | |
| | |
| Code | AAR |
| RU | Афарский |
| EN | Afar |
| UA | Афарський |
| LV | Afāru |
| Stirring | |
| | |
| | Save |

In general view of Languages you can see the database of all languages. The column "Active" shows which languages are included in the system, which means that the user is able to choose this language while working on translator's or project data.

| anguages | ges | | | | |
|----------|-----------|-----------|-----------|--------------|----------|
| Code | RU | EN | UA | III → Search | Status |
| AAR | Афарский | Afar | Афарський | Afāru | Active |
| ABK | Абхазский | Abkhazian | | Abhāzijas | Inactive |

User can filter data in Languages database by using 3 methods:

1. Type letters or numbers in "Search" field and click "Enter"

| L | anguages | | | | | | |
|------|-------------|----|----------|----|----|----------|----------|
| Mair | > Languages | | | | | | |
| | | | | | | | |
| | Code | RU | EN | UA | LV | Status | Balinese |
| | BAN | | Balinese | | | Inactive | |

Below you will see a list of parameters (column names) the system searches data for:

- Language code
- Language name in Russian
- Language name in English
- Language name in Ukrainian
- Language name in Latvian
- Language status (active or inactive).

! Please note that data filter can be removed by deleting the text in the "Search" field and clicking "Enter".

2. Filter data by sorting data from A to Z and vice versa by clicking on the column name.

| .anguag ain > Languages | es | | | | |
|----------------------------|-----------|-----------|-----------|-----------|------------------|
| Code 🔺 | RU | EN | UA | III • | Search Status |
| AAR | Афарский | Afar | Афарський | Afāru | Active |
| АВК | Абхазский | Abkhazian | | Abhāzijas | Inactive |
| ACE | | Achinese | | | Inactive |

3. Review the columns that you want to see in the Languages table. To add or remove a particular column from the table, simply click and select the columns that you want (or do not want) to view in the Languages database. This feature is especially relevant, if there are big databases with many columns and/or relatively small monitor/tablet/smartphone screen.

| Languages | | | | |
|------------------|-----------|-----------|-----------|----------|
| Main > Languages | | | | |
| | | | | |
| | | | | Search |
| Code | RU | UA | LV | Code |
| AAR | Афарский | Афарський | Afāru | RU EN |
| ABK | Абхазский | | Abhāzijas | ✓ UA |
| ACE | | | | ✓ Status |

! Please note that the system will save these settings for upcoming user sessions.

3.9. Translation domains

To open the system configuration click "Configuration" -> "Domains" on the Navigation pane.



Domain table data contains all translation areas that a translation agency is able to do translations for. Translation areas are revealed in the following system sections:

- Translator's data
- Translator's section.

To add a new translation area click "Add new domain".



| Field | Description |
|-----------|--------------------------------------|
| Name [EN] | Translation domain name in English |
| Name [RU] | Translation domain name in Russian |
| Name [UA] | Translation domain name in Ukrainian |
| Name [LV] | Translation domain name in Latvian |

Value of each field is used in the interface of particular language.

After the fields are filled, click "Save".

| New domain Main > Domains > New domain | |
|---|---------------|
| Name RU | Страхование |
| Name EN | Insurance |
| Name UA | Страхування |
| Name LV | Apdrošināšana |

In general view of translation areas you can see all translation domains.

| Dor _{Main} ⇒ [| nains | | | |
|----------------------------|----------------------|--------------|-------------|---------------------|
| D | elete Add new domain | | | iii → Search |
| | Name RU | Name EN | Name UA | Name LV |
| | Страхование | Insurance | Страхування | Aprošināšana |
| | Архитектура | Architecture | Архітектура | Arhitektūra |
| | Автомобили | Automotive | Автомобілі | Automobīļi |

User can filter data in the Languages database by using 3 methods:

1. Type letters or numbers in "Search" field and click "Enter"

| Domains | | | | |
|-----------------------|-----------|-------------|--------------------------|---------------|
| Main > Domains | | | | |
| Delete Add new domain | | | ₩ • Insurance | |
| Name RU | Name EN | Name UA | Name LV | Name LV |
| Страхование | Insurance | Страхування | Apdrošināšana | Apdrošināšana |

Below you will see a list of parameters (column names) the system searches data for:

- Domain name in Russian
- Domain name in English
- Domain name in Ukrainian
- Domain name in Latvian.

! Please note that data filter can be removed by deleting the text in the "Search" field and clicking "Enter".

2. Filter data by sorting data from A to Z and vice versa by clicking on the column name.
| Domai Main > Domains | | | | | | |
|-------------------------|-------------------|--------------|-----------------------|-----------|-----------------------|--------|
| Delete | Add new domain | | | | Ⅲ • | Search |
| Na Na | ame RU | Name EN 🔺 | Name UA | Name LV | / | |
| Бу | ухгалтерия | Accounting | Бухгалтерія | Grāmatve | edība | |
| Ce | ельское хозяйство | Agriculture | Сільське господарство | Lauksaim | niecība | |
| 🔲 Ap | рхитектура | Architecture | Архітектура | Arhitektū | ira | |

3. Review the columns that you want to see in the Translation domains table. To add or remove a particular column from the table, simply click and select the columns that you want (or do not want) to view in the Domains database. This feature is especially relevant, if there are big databases with many columns and/or relatively small monitor/tablet/smartphone screen.

! Please note that the system will save these settings for upcoming user sessions.

| Dom Main⇒ Dor | | | | |
|------------------|--------------------|-------------|-----------------------|---------------------|
| Del | ete Add new domain | | | ₩ • Search |
| | Name RU | Name EN 🔺 | Name UA | ✓ Name RU ✓ Name EN |
| | Бухгалтерия | Accounting | Бухгалтерія | 🗷 Name UA |
| | Сельское хозяйство | Agriculture | Сільське господарство | 🔲 Name LV |

Click on the text to browse Domains data.

| Domains | | | |
|-----------------------|--------------|-------------|--------------|
| Main > Domains | | | |
| Delete Add new domain | | | |
| | | | Search |
| Name RU | Name EN | Name UA | Name LV |
| Страхование | Insurance | Страхування | Aprošināšana |
| 🔲 Архитектура | Architecture | Архітектура | Arhitektūra |
| Автомобили | Automotive | Автомобілі | Automobīļi |

In order to remove a particular Domain, check the box next to the domain that you want to delete and click "Delete".

| Domains | | | | | | | |
|-----------------------|--------------|-------------|--------|--------------|--------|--|--|
| Main > Domains | | | | | | | |
| Delete Add new domain | | | | | | | |
| | | | | III • | Search | | |
| Name RU | Name EN | Name UA | Nam | ie LV | | | |
| Страхование | Insurance | Страхування | Apros | šināšana | | | |
| 🖉 Архитектура | Architecture | Архітектура | Arhite | ektūra | | | |

3.10. Cities

To manage a cities list browse "Board -> Cities".



Cities are revealed in the following system section:

• Translators' data (linking translator to a particular city).

To add a new city click "Add city".

| Cities | | | | | | | |
|---------------|----------|--|--|--|--|--|--|
| Main > Cities | | | | | | | |
| | | | | | | | |
| Delete | Add city | | | | | | |

| Field | Description |
|-----------|--|
| City name | Specify name of the city |
| Country | Choose a country from a pre-defined country list |

After the fields are filled, click "Save".

| New city Main > Cities > New city | | |
|--------------------------------------|----------------------|------|
| City name Country | Bucharest ROMANIA | |
| | | Save |

In general view of Cities you can see all cities that have been added to the list. A system user can create as many cities, as it needs for daily work.

| Cities | | |
|-----------------|---------|-------------------|
| Main > Cities | | |
| | | |
| Delete Add city | | |
| | | Ⅲ ▼ Search |
| □ City name ▲ | Country | |
| Bucharest | ROMANIA | |
| Copenhagen | DENMARK | |
| 🗌 Helsinki | FINLAND | |

User can filter data in the Cities database by using 2 methods:

1. Type letters or numbers in "Search" field and click "Enter"

| Cities | | |
|-----------------|---------|-----------------|
| Main > Cities | | |
| Delete Add city | | Ⅲ ▼ Oslo |
| City name | Country | |
| Oslo | NORWAY | |

Cities can be searched by City name.

! Please note that data filter can be removed by deleting the text in the "Search" field and clicking "Enter".

2. Filter data by sorting data from A to Z and vice versa by clicking on the column name.

| Cities | | |
|-----------------|-----------|--------------|
| Main > Cities | | |
| Delete Add city | | |
| | | III - Search |
| City name | Country 🔺 | |
| Copenhagen | DENMARK | |
| Tallin | ESTONIA | |
| E Helsinki | FINLAND | |
| Riga | LATVIA | |

Click on the text to browse City details.

| Citie | 25 | | | |
|-----------|-------------|---------|--------------|--------|
| Main → Ci | ies | | | |
| | | | | |
| De | Add city | | | |
| | | | iii • | Search |
| | City name 🔺 | Country | | |
| | Bucharest | ROMANIA | | |
| | Copenhagen | DENMARK | | |
| | Helsinki | FINLAND | | |

In order to remove a particular City, check the box next to the city that you want to delete and click "Delete".

| Cities | | |
|-----------------|---------|------------|
| Main > Cities | | |
| Delete Add city | | Search |
| City name 🔺 | Country | |
| Bucharest | ROMANIA | |

3.11. Programs

To manage a company branches list browse "Board -> Programs".



The company offices are revealed in the following system sections:

• Translator's data.

To add a software click "Add new software".



In the table below you can see the description of fields related to programs.

| Field | Description |
|-------------|---|
| Name | Mandatory field – specify a program name (the |
| | one you will see further in the system) |
| Description | Provide description of the program |

After the fields are filled, click "Save".

| New program | |
|-------------|---------------------------|
| Name | Microsoft Dynamics Axapta |
| Description | ERP system |
| | |
| | |
| | |
| | Save |

In general view of Programs you can see all software that has been added to the list.

| Programs | | |
|---------------------|---------------------|-------------------|
| Main > Programs | | |
| Delete Add software | | Ⅲ ▼ Search |
| Name | Description | |
| MS Word | Текстовый редактор | |
| MS Excel | Электронная таблица | |

Click on the text to browse Domains data.

| Programs Main > Programs | | |
|-----------------------------|---------------------|------------|
| Delete Add software | | Search |
| Name | Description | |
| MS Word | Текстовый редактор | |
| MS Excel | Электронная таблица | |

In order to remove particular Software, check the box next to the software that you want to delete and click "Delete".

| Prog | grams | | | |
|------------|------------------|---------------------|--------------|--------|
| Main > Pro | grams | | | |
| De | ete Add software | | | |
| | | | III • | Search |
| | Name | Description | | |
| | MS Word | Текстовый редактор | | |
| | MS Excel | Электронная таблица | | |

User can filter data in the Invoices database by using 3 methods:

1. Type letters or numbers in "Search" field and click "Enter"

| Prog | rams | | |
|------------|-----------------------------|-------------------------|------------------|
| Main → Pro | yans | | |
| Del | Add software | | |
| | | | Ⅲ ▼ Adobe |
| | Name | Description | |
| | Adobe Illustrator | Программа макетирования | |
| | Adobe ^P hotoshop | Редактор изоображений | |

Below you will see a list of parameters (column names) the system searches data for:

- Name
- Description.

! Please note that data filter can be removed by deleting the text in the "Search" field and clicking "Enter".

2. Filter data by sorting data from A to Z and vice versa by clicking on the column name.

| Prog Main > Prog | rams | | |
|---------------------|-------------------|-------------------------|--------|
| Dele | ete Add software | III ~ | Search |
| | Name 🔺 | Description | |
| | Adobe Illustrator | Программа макетирования | |
| | Adobe Photoshop | Редактор изоображений | |
| | Deja Vu | Translation Memory | |

3. Review the columns that you want to see in the Software table. To add or remove a particular column from the table, simply click and select the columns that you want (or do not want) to view in the Software database. This feature is especially relevant, if there are big databases with many columns and/or relatively small monitor/tablet/smartphone screen.

! Please note that the system will save these settings for upcoming user sessions.

| Prog | rams | | |
|-------------|---------------------------|---------------|---|
| Main > Prog | rams | | |
| Dele | te Add software | | ₩ ▼ Search |
| | Name | Description 🔺 | ✓ Name ✓ Description |
| | Microsoft Dynamics Axapta | ERP system | e Description |
| | Notepad | Text editor | |

3.12. Branches

To manage a company branches list browse "Management -> Branches".



The company offices are revealed in the following system sections:

- Customer's data (linking Customer to one of the company's branches)
- Adding new project (if a user chooses to create a new project from the Customer, which is not saved in the Customer database, the system will require the most important data about the Customer to be submitted, including the Branch).

To add a branch click "Add new branch".

| Branch Main > Branches | 0 |
|---------------------------|------------|
| Delete | Add branch |

In the table below you can see the description of fields related to branch.

| Field | Description |
|-----------------|--|
| Branch name* | Mandatory field – specify a branch name (the one |
| | you will see further in the system) |
| Owner | Owner of the branch |
| Director | Director of the branch |
| Address | Address of the branch |
| Office hours | Working hours of the branch |
| Phone | Phone number |
| Mobile | Mobile number |
| Fax | Fax number |
| E-mail | E-mail address |
| Skype | Skype account name |
| ICQ | ICQ account name |
| Website address | Website address |
| Comments | Additional comments |

All the fields below Branch name are for translation agency management reference, stored only in Branches section.

After the fields are filled, click "Save".

| Skype | tagency_main |
|-----------------|------------------|
| ICQ | N/A |
| Website address | www.tagency.com |
| Comment | Secondary branch |
| | |
| | |
| | |
| | |
| | |

In general view of Branches you can see all offices that have been added to the list.

| an > Brar | iches | | | | | |
|--------------|----------------|--|---|--|-------|--------------|
| Del | ete Add branch | | | | III • | Search |
| | Branch name | Owner | Director | Address | | Office hours |
| | | | | | | |
| | Riga | Karlis Lucs | Olegs Jegorovs | Riga, Brivibas Street 45, office 3 | | 9.00-17.30 |
| | Riga Moscow | Karlis Lucs Alexander Alexandrovitsch | Olegs Jegorovs Alexander Alexandrovitsch | Riga, Brivibas Street 45, office 3 323401, Moscow, Moskovskiy avenue 12 | | 9.00-17.30 |
| | - | | | | | |

User can filter data in the Branches database by using 3 methods:

1. Type letters or numbers in "Search" field and click "Enter"

| Bran | ches | | | | |
|-------------|----------------|-------------|----------------|------------------------------------|-----------------|
| Main > Brai | iches | | | | |
| Del | ete Add branch | | | | ₩ - Riga |
| | Branch name | Owner | Director | Address | Office hours |
| | Riga | Karlis Lucs | Olegs Jegorovs | Riga, Brivibas Street 45, office 3 | 9.00-17.30 |

Below you will see a list of parameters (column names) the system searches data for:

- Branch name
- Owner
- Director
- Address
- Office hours.

! Please note that data filter can be removed by deleting the text in the "Search" field and clicking "Enter".

2. Filter data by sorting data from A to Z and vice versa by clicking on the column name.

| Brar Main⇒ Bra | nches | | | | | |
|-------------------|----------------|---------------------------|---------------------------|--------------------------------------|---|--------------|
| Del | ete Add branch | | | | ₩ | Search |
| | Branch name | Owner 🔺 | Director | Address | | Office hours |
| | Moscow | Alexander Alexandrovitsch | Alexander Alexandrovitsch | 323401, Moscow, Moskovskiy avenue 12 | | 10.00-19.00 |
| | Sydney | Andy Hoover | Andy Hoover | 600 George St, Sydney NSW 2000 | | 7.00-19.00 |
| | Tokyo | Daike Ito | Daike Ito | Tokyo Station Ichibangai | | 8.00-20.00 |
| | | | | | | |

3. Review the columns that you want to see in the Branches table. To add or remove a particular column from the table, simply click and select the columns that you want (or do not want)

to view in the Branches database. This feature is especially relevant, if there are big databases with many columns and/or relatively small monitor/tablet/smartphone screen.

! Please note that the system will save these settings for upcoming user sessions.

| Brar Main > Bro | nches | | | | |
|--------------------|-----------------------|---------------------------|---------------------------------------|---|--|
| | | | | | |
| De | ete Add branch | | | | |
| | | | | | |
| | Branch name | Owner 🔺 | Director | Address | Branch name Owner |
| - | Branch name Moscow | Owner A | Director Alexander Alexandrovitsch | Address 323401, Moscow, Moskovskiy avenue 12 | Branch name Owner Director |
| | | | | | ☑ Owner ☑ Director ☑ Address |
| | Moscow | Alexander Alexandrovitsch | Alexander Alexandrovitsch | 323401, Moscow, Moskovskiy avenue 12 | Owner |

Click on the text to browse Branch data.

| ran | ches | | | | | |
|--------|---------------|---------------------------|---------------------------|--------------------------------------|---------|--------------|
| > Bran | iches | | | | | |
| Dele | te Add branch | | | | | |
| Bich | | | | | | Search |
| | Branch name | Owner | Director | Address | | Office hours |
| | Riga | Karlis Lucs | Olegs Jegorovs | Riga, Brivibas Street 45, office 3 | | 9.00-17.30 |
| | Moscow | Alexander Alexandrovitsch | Alexander Alexandrovitsch | 323401, Moscow, Moskovskiy avenue 12 | | 10.00-19.00 |
| | Tokyo | Daike Ito | Daike Ito | Tokyo Station Ichibangai | | 8.00-20.00 |
| | | | | | | |

In order to remove a particular Branch, check the box next to the branch that you want to delete and click "Delete".

| Bran ™⇒ Bra | iches nches | | | | | |
|----------------|----------------|-----------------------------|-----------------------------------|---|--------------|----------------------------|
| Del | ete Add branch | | | | | |
| | | | | | | Search |
| | Branch name | Owner | Director | Address | ₩ ▼ | Search Office hours |
| | Branch name | Owner Karlis Lucs | Director Olegs Jegorovs | Address Riga, Brivibas Street 45, office 3 | III • | |
| | | | | | | Office hours |
| | Riga | Karlis Lucs | Olegs Jegorovs | Riga, Brivibas Street 45, office 3 | | Office hours 9.00-17.30 |

4. Finance data management

4.1. Sales report

To browse Sales report click "Accounting -> Sales report".



To gather statistics fill the data in the "Search" field. If no data is supplied and the user clicks "Search", the system will not gather any data. This approach has been chosen to save the system resources while supplying the user with massive (and in most cases not needed) data amount.

In case you need to filter data by sorting information in a particular column from A to Z and vice versa by clicking on the column name.

| Export | | | | | | | | | | | |
|-----------------|------------|-----------|------------------------|--|-----------------|------------------------------|----------------|--------------|--------------|-------------------|----------|
| Project | Deadline | Languages | Туре | Amount | Customer | Vendor | Manager | Price | Cost | Paid to vendor | Finished |
| % 17-001 | 27.07.2017 | - | Written translation | 7200 characters (calculation of original document) | Линкевич Ева | | Veretina Maria | 40.00 USD | 10.00 USD | No | No |
| % 90-001 | 19.07.2017 | ENG->HUN | Written translation | 5 pages (calculation of original document) | Smith John | Fast translations Ltd. | Karlis | 0.00 USD | 60.00 USD | No | No |

! Please fill in the data to minimize affect to system performance.

Every line in the Sales report replicates one task from the project section. For example, if you have 20 tasks in total for written translation in the project section (might be either under 1 project or many projects), then you should have 20 lines in the Sales report (if the box "Written translation" is checked and no other search parameters have been applied).

Search parameters are described in the table below.

| Field | Description |
|------------------------|---|
| Completion date from | Refers to project tasks deadline |
| Completion date to | Refers to project tasks deadline |
| Customer | Customer's name |
| Translator | Translator's name |
| Sworn translator | Sworn translator's name |
| Manager | Manager's name |
| Branch | Translation agency's name |
| Written translation | Check the box, if you are looking for written |
| | translation tasks |
| Oral translation | Check the box, if you are looking for oral |
| | translation tasks |
| Translator services | Check the box, if you are looking for translator |
| | services (selection, literary editing, validation, |
| | layout, proofreading) tasks |
| DTP | Check the box, if you are looking for layout design |
| | tasks |
| Notary certification | Check the box, if you are looking for Notary |
| | certification tasks |
| Sworn translator | Check the box, if you are looking for tasks that are |
| | handled by sworn translators |
| Other task | Check the box, if you are looking for other tasks (In |
| | tasks section the task type marked as "other") |
| Task paid to performer | Check the box, if you wish to see tasks with closed |
| | payments to vendors |
| Task completed | Check the box, if you wish to see payments for |
| | completed tasks |

Written translation, translation services, DTP, Notary certification, sworn translation and other task – all of these are replica of written translation task types.

After the user has clicked "Search", the system supplies it with 2 tables:

- Sales transactions table
- Revenue/currency table.

| Export Project | Deadline | Languages | Туре | Amount | Customer | Vendor | Manager | Price | Cost | Paid to vendor | Finished |
|-------------------|------------------------|-----------|---------------------|---------------|----------|------------------|-------------------|--------------|--------------|-------------------|----------|
| % 95-007 | 15.06.2017 16:00:00 | ITA->RUS | Oral translation | 8.00 hours | МТИ | Stratelli Mia | Jegorovs Olegs | 41.00 EUR | 18.00 RUR | Yes | Yes |
| | | | | | | | | | | | |
| Tasks | | | EUR | | | | RUR | | | | |
| 1 | | | 41.00 | | | | -18.00 | | | | |

In the table below you can see the description of fields related to sales transactions.

| Column name | Description |
|---------------------------|---|
| Project | Equals to project document number |
| Deadline | Task deadline |
| Languages | Language pair |
| Туре | Translation type (written/oral) |
| Amount (for the Customer) | Amount for the Customer (manager's specified |
| | amount of translation), data taken from task |
| | details |
| | Calculation from original/translated document – |
| | data taken from the project document's data |
| Customer | Customer's name |
| Vendor | Vendor's name |
| Manager | Responsible manager's name for the project (can |
| | be reviewed in general project data window) |
| Price | Price of the task (for the Customer) |
| Cost | Cost of task (honorarium to vendor) |
| Paid to vendor | Status of payment to vendor (yes/no) |
| Finished | Task status (yes/no) |

! Please note that for Sales transactions table the system reveals written and oral translation tasks in two separate tables.

Content of Currency table is straight forward described in the table below. Written and oral translation tasks are included in the same table of Currencies.

| Column name | Description |
|-------------|---------------|
| Tasks | Task quantity |

| Price | Price in total for selected tasks |
|--------------|--|
| Cost | Cost in total for selected tasks |
| Gross profit | Gross profit in total for selected tasks |

Click **Export** icon to export data in .csv format (can be opened with Microsoft Excel). Below you can see the exported file in MS Excel.

| | o• c> ∙ Home IN | ≑ ISERT PAGE LA | YOUT | FORMULAS | S DATA REVIEW | ca VIEW POWER | ils_4174245.csv - Exc PIVOT | el | | | | | | ? | 📧 🗕 Karlis Lu |
|------------|--|---------------------------|----------------------------------|--------------------------|---|---------------------------------|--------------------------------|--------------------------|----------------------|-----------------|--------------|-------------------------|---|---------------------------------------|------------------------|
| Paste | | Calibri B I <u>U</u> - | • 11 • | AA | | 9 Wrap Text Merge & Center 🔹 | General | | | _ | sert Delet | e Format | ∑ AutoSur ↓ Fill + € Clear + | n * Azy i Sort & Fi Filter * Se | |
| Clipbo | ard r | μ Fo | nt | Es. | Alignmen | t G | Number | г <u>а</u> 5 | tyles | | Cells | | | Editing | |
| | | | | | | | | | | | | | | | |
| Δ Δ | B | | D | F | F | 6 | | н | 1.1 | 1 | к | 1 | м | N | 0 |
| A Project | | C | D | E | F | G | | H | Payment t | J Paid to ve | K | L Gross profit | M | N | 0 Finished |
| A Project | Order date | | Language | | | Customer | | Vendor | l Payment t 75 | | Price | L Gross profit 65 | Currency | Manager | Finished |
| 61-001-0 | Order date 1 22.04.2014 | 23.04.2014 17:00 | Language UKR->ENG | Sworn trai | 5 pages (calculation of o | - Customer Илика Наталья | | Vendor Jegorovs Olegs | 75 | Yes | Price 140 | 65 | Currency UAH | Manager Olegs Jegorovs | Finished Yes |
| 2 61-001-0 | Order date 122.04.2014 126.02.2015 | 23.04.2014 17:00 | Language UKR->ENG ENG->RUS | Sworn trai Written tr | 5 pages (calculation of o 1.7 characters (calculatio | - Customer Илика Наталья | | Vendor | | Yes Yes | Price | - 65 | Currency UAH USD | Manager | Finished Yes Yes |

4.2. Revenue report

To view a report containing finance income related data, browse "Accounting" -> "Revenue" in the main menu.



To gather statistics fill the data in the "Search" field. If no data is supplied and the user clicks "Search", the system will gather data taking into account a parameter, specified under Currency.

! Please fill in as much data as possible to minimize affect to system performance.

Every line in Income report replicates one task from the project section. For example, if you choose Manager "Olegs Jegorovs" and click the "Search" button, the system will supply you with all tasks, which were handled by Olegs Jegorovs.

| Income | | | | | |
|------------------|----------------|----------------|----------------|---------|----------|
| Main > Income | | | | | |
| | | | | | |
| Date from | | | | | m |
| Date to | | | | | |
| Payment method | | | | | • |
| Manager | Jegorovs Olegs | | | | • |
| | | | | | |
| | | | | | Search |
| | | | | | |
| Delete | | | | | |
| | | | | | |
| □ Date № | Price | Manager | Payment method | Comment | |
| 03.12.2016 18:13 | 0.00 | Jegorovs Olegs | Moneybookers | 2 | |
| 03.12.2016 18:13 | 0.00 | Jegorovs Olegs | Bank account | 1 | |

Search parameters are described in the table below.

| Field | Description |
|----------------|--|
| Date from | Date range from |
| Date to | Date range to |
| Payment method | Payment method used to process payment |
| Manager | Responsible project manager |

System supplies the user with a table of income.

In the table below you can see the description of fields related to incomes.

| Column name | Description |
|--|---|
| Date | Payment processing date |
| No. | Project No. with reference to the following: |
| | Customer No.; Project No.; Document No. |
| Price | Price for the Customer, data collected from task |
| | details (amount and currency from "Budget of task |
| | for Customer") |
| Manager | Responsible project manager |
| Payment method (Bank account, Moneybookers | Payment methods are collected from the Payment |
| etc.) | methods table under the Board section. The |
| | system creates one column for one payment |
| | method. |
| Comment | Comment related to a particular payment |

! Currency in the "Price" column stands for the *task budget in project data*. The system allows various combinations of general task budget and the actual payments by the Customer, possibly in different currencies. For example, the task budget might be 10,000 RUR, but the manager could receive a few payments from the Customer in USD.

4.3. Vendor payments report

To view a report containing payments related data, click "Accounting -> Vendor payments" in the main menu.



To gather statistics fill the data in the "Search" field. If no data is supplied and the user clicks "Search", the system will reveal all payments that are pending.

! Please fill in as much data as possible to minimize affect to system performance.

Every line in the Payment report replicates to one task from the project section. For example, if you have 20 tasks in total for the project section, then you should have 20 lines in the Payment report.

Search parameters are described in the table below.

| Field | Description |
|-----------|---|
| Date from | Date range from (project creation data) |
| Date to | Date range to (project creation data) |

| Task type | Task type – equals to available task types in task |
|----------------|--|
| | details |
| Payment status | Status of payment (closed/pending) |
| Performer | Performer's name |
| Contact data | Contact data of vendor |

The system supplies the user with a table of payments.

| Payments Main > Payments | | | | | | | |
|----------------------------------|-----------------------|----------------|---------|--------|--------|---------|---------|
| Date from | 30.07.2017 | | | | | | Ê |
| Date to | | | | | | | <u></u> |
| Task type | | | | | | | • |
| Payment status | | | | | | | - |
| Task status | | | | | | | • |
| Performer | | | | | | | |
| Contact data | | | | | | | |
| | | | | | | | |
| | | | | | | | Search |
| | | | | | | | |
| Send | | | | | | | |
| | | | | | | | |
| ■ Nº Status Per | former Price | Cost Paid | Pending | Amount | Method | Comment | |
| 90-003 Awaiting confirmation Kap | амин Сергей 70.00 USD | 30.00 USD 0.00 | 30.00 | 0.00 | | 1 | |
| 90-003 Awaiting confirmation Kap | амин Сергей 0.00 USD | 6.00 USD 0.00 | 6.00 | 0.00 | | | |

In the table below you can see the description of fields related to payments.

| Column name | Description | | |
|-------------|--|--|--|
| No. | Project No. with reference to the following: | | |
| | Customer No.; Project No.; Document No. | | |
| Status | Project status | | |
| Performer | Task performer (specified in task data) | | |
| Price | Price for the Customer | | |
| Cost | Cost or payment to the vendor | | |
| Paid | Closed amount of payment | | |
| Pending | Pending amount of payment | | |
| Amount | Specify payment amount | | |
| Method | Specify payment method | | |
| Comment | Leave a comment about the payment | | |

! Please note that payments can be saved in the "Payments" table only (in previous version of OCLanguage there was an option of saving payments data in the project details). In "Payments" section a user is not

able to specify currency, it coincides with the currency from the "Cost" column. To save a new payment to the vendor, the user has to specify payment amount, choose payment method and click "Save".

| Ser | d | | | | | | | | | | |
|-----|--------|-----------------------|----------------|-----------|-----------|------|---------|--------|--------------|---------|---------|
| | Nº | Status | Performer | Price | Cost | Paid | Pending | Amount | Method | Comment | |
| V | 90-003 | Awaiting confirmation | Карамин Сергей | 70.00 USD | 30.00 USD | 0.00 | 30.00 | 30 | Bank account | | |

If a partial payment is made, the system deducts pending amount in "Payments" table, deducts pending amount in the second table, but leaves a record in the second table under "Outstanding payments" column.

4.4. Payments to vendors history

To view a report containing payments history data, browse "Accounting -> Payments history".



To gather statistics fill the data in the "Search" field. If no data is supplied and the user clicks "Search", the system will reveal all payments that are made.

! Please fill in as much data as possible to minimize affect to system performance.

Every line in the Payment report equals to the payments made (it might be full or partial payment of one task).

Search parameters are described in the table below.

| Field | Description |
|-----------|---|
| Date from | Date range from when the payment was made |
| Date to | Date range from when the payment was made |

| Task type Type of performed task | |
|------------------------------------|---|
| Payment status | Specify payment status (closed/pending) |
| Performer | Performer's name |
| Contact data | Contact data of vendor |

The system supplies the user with a table of payments history.

| Payments history | | | | | | |
|----------------------------|------------------------|------------------|------------|--------------|---------|-----------|
| Date from | 20.06.2017 | | | | | Ê |
| Date to | 30.06.2017 | | | | | Ê |
| Na | | | | | | |
| Payment method | Bank account | | | | | • |
| Performer | *** | | | | | • |
| Manager | Karlis | | | | | • |
| | | | | | | |
| | | | | | | Search |
| | | | | | | |
| Delete | | | | | | |
| | | | | | | * |
| Date N2 | Task type Paid i | in total Perform | er Manager | Method | Comment | |
| 21.06.2017 % 95-007 | Oral translation 9 RUR | Stratelli I | lia Karlis | Bank account | | 1 |

In the table below you can see the description of fields related to payment history.

| Field | Description |
|-----------|--|
| No. | Project No. with reference to the following: |
| | Customer No.; Project No.; Document No. |
| Status | Project status |
| Performer | Performer's name and surname |
| Price | Price for the Customer |
| Cost | Total payment amount to the vendor |
| Paid | Total amount that was paid to the vendor |
| Pending | Total amount that has not been paid yet |
| Amount | Payment amount |
| Method | Payment method (all payment methods options |
| | are collected from the Payment method table |
| | under Board section) |
| Comment | Manager's comment to this payment |

The main purpose of this section is to control the outgoing financial flow per particular date or period.

Besides the aforementioned option for searching data, the manager can use two more methods for gathering the required data:

1. Filter data by sorting data from A to Z and vice versa by clicking on the column name.

| Del | ete | | | | | | | | | |
|-----|------------|-----------------|-----------------------|------------------|---------------|------------------------|----------------|--------------|----------------|--------------|
| | | | | | | | | | | III • |
| | Date 🔺 | N≘ | Status | Task type | Paid in total | Performer | Manager | Method | Comment | |
| | 20.06.2017 | % 95-007 | Awaiting confirmation | Oral translation | 15.44 RUR | Fast translations Ltd. | Jegorovs Olegs | Bank account | Перевод оплаты | 1 |
| | 21.06.2017 | % 95-007 | Awaiting confirmation | Oral translation | 18 RUR | Карамин Сергей | Karlis | Bank account | | 1 |

Review the columns that you want to see in the Payments history table. To add or remove a particular column from the table, simply click and select the columns that you want (or do not want) to view in the Payments history database. This feature is especially relevant, if there are big databases with many columns and/or relatively small monitor/tablet/smartphone screen.

! Please note that the system will save these settings for upcoming user sessions.

| Del | ete | | | | | | | | |
|-----|------------|-----------------|------------------|---------------|------------------------|----------------|--------------|----------------|-------------------|
| | Date | N≘ | Task type | Paid in total | Performer | Manager 👻 | Method | Comment | ✓ Date |
| | 21.06.2017 | % 95-007 | Oral translation | 9 RUR | Stratelli Mia | Karlis | Bank account | | Status |
| | 21.06.2017 | % 95-007 | Oral translation | 18 RUR | Карамин Сергей | Karlis | Bank account | | Paid in total |
| | 21.06.2017 | % 95-007 | Oral translation | 50 RUR | | Karlis | Bank account | | Method Comment |
| | 20.06.2017 | % 95-007 | Oral translation | 15.44 RUR | Fast translations Ltd. | Jegorovs Olegs | Bank account | Перевод оплаты | |

4.5. Settlements with Customers

To view business statistics data, click "Accounting -> Settlements with Customers" in the main menu.



To gather statistics fill the data in the "Search" field. If no data is supplied and the user clicks "Search", the system will reveal all settlements with the Customer.

! Please fill in as much data as possible to minimize affect to system performance.

Every line in the Settlements report equals to a task (it might be full or partial payment of one task).

Search parameters are described in the table below.

| Field | Description |
|---------------|--|
| Date | Order date |
| Order | Project number (consists of project and task number) |
| Status | Project task status |
| Customer | Customer's name |
| Amount | |
| Price | Price for the Customer |
| Paid | Amount paid to the Customer |
| Opened amount | Opened amount to the Customer |

| Total | Specify total amount of payment |
|-------|---------------------------------|
|-------|---------------------------------|

The system supplies the user with a table of payments history.

| Transactions with Customers | | | | | | | | | | |
|--------------------------------------|------------------|--------|------------|--------|----------------|-------|--------|---|---------|--------|
| Date from | | | | | | | | | | m |
| Date to | | | | | | | | | | Ê |
| Task type | Oral translation | 1 | | | | | | | | • |
| Payment status | Unpaid | | | | | | | | | - |
| Task status | Opened | | | | | | | | | • |
| Customer | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | Search |
| | | | | | | | | | | |
| Send Export | | | | | | | | | | |
| | | | | | | | | | | |
| Order Status | Customer | Amount | Price | Paid | Opened payment | Total | Method | | Comment | |
| Section 25-007 Awaiting confirmation | МТИ | 12.00 | 120.00 EUR | 180.00 | -60.00 | 0.00 | | T | | 11 |
| Awaiting confirmation | МТИ | 5.00 | 50.00 EUR | 100.00 | -50.00 | 0.00 | | ¥ | | |

In the table below you can see the description of fields related to payment history.

| Field | Description |
|----------------|--|
| Order No. | Project No. with reference to the following: |
| | Customer No.; Project No.; Document No. |
| Status | Project status |
| Customer | Customer's name and surname / company name |
| Amount | Project task amount (characters, words, pages, |
| | hours etc.) |
| Price | Price for the Customer |
| Paid | Total amount that was paid to the Customer |
| Opened payment | Total amount that has not been paid yet |
| Total | Payment amount |
| Method | Payment method (all payment methods options |
| | are collected from the Payment method table |
| | under Board section) |
| Comment | Manager's comment to this payment |

The main purpose of this section is to save the incoming Customer payments and to control the incoming financial flow per particular date or period.

Besides the aforementioned option for searching data, the manager can use two more methods for gathering the required data:

| Sen | d Export | | | | | | | | | | III • |
|-----|-----------------|-----------------------|----------|--------|---------------|-------|----------------|-------|--------|---------|--------------|
| | | | | | | | Opened payment | | | | |
| | Order | Status | Customer | Amount | Price | Paid | - | Total | Method | Comment | |
| | % 65-002 | Awaiting confirmation | SIA OCL | 6.00 | 80.00 EUR | 0.00 | 80.00 | 0.00 | | | 11 |
| | % 65-001 | In progress | SIA OCL | 8.00 | 100.00 USD | 42.00 | 58.00 | 0.00 | 🔻 | | |
| | % 95-007 | Awaiting confirmation | МТИ | 8.00 | 41.00 EUR | 10.00 | 31.00 | 0.00 | | | 1. |

1. Filter data by sorting data from A to Z and vice versa by clicking on the column name.

Review the columns that you want to see in the Payments history table. To add or remove a particular column from the table, simply click and select the columns that you want (or do not want) to view in the Payments history database. This feature is especially relevant, if there are big databases with many columns and/or relatively small monitor/tablet/smartphone screen.

! Please note that the system will save these settings for upcoming user sessions.

| Send | Export | | | | | | | | | |
|------|-----------------|----------|--------|----------|------|----------------|-------|--------|-----------|------------------|
|] | Order | Customer | Amount | Price | Paid | Opened payment | Total | Method | Comment 🗸 | Order Status |
| | % 95-007 | МТИ | 0.00 | 0.00 EUR | 0.00 | 0.00 | 0.00 | 🔻 |] | Custome |
|) | % 95-007 | МТИ | 0.00 | 0.00 EUR | 0.00 | 0.00 | 0.00 | ¥ |] | Price |
|) | % 65-001 | SIA OCL | 0.00 | 0.00 USD | 0.00 | 0.00 | 0.00 | ¥ |] | Total |

4.6. Statistics

To view business statistics data, click "Statistics" in the main menu.



To gather statistics set the period start and end dates. The user can leave "start date" empty, but "end date" field should always be filled.

Search parameters are described in the table below.

| Field | Description |
|-----------|---|
| Date from | Date range from (period the user wants to gain |
| | data for) |
| Date to | Date range to (period the user wants to gain data |
| | for) |

| Statistics Main > Statistics | | |
|---------------------------------|------------|--------|
| Date from Date to | 29.06.2017 | |
| | | Search |

! Please fill in as much data as possible to minimize affect to system performance.

Statistics section consists of 10 charts, representing the main KPIs of translation agency business.

1. New Customers – the system counts the Customers as new ones, if they are registered in OCLanguage within the specified period in Search window. In brackets the user can see the total amount of Customers.



2. New projects – the system counts order (project) as new, if it was placed in OCLanguage within the specified period in Search window. In brackets the user can see the total amount of orders.



3. Project type – written/oral.



4. Task type – in the table below you can see the description of fields related to project tasks statistics.

| Row name | Description |
|------------------|---|
| Oral translation | Oral translation task amount within specified |
| | period |

| Written translation | Written translation task amount within specified |
|----------------------|---|
| | period |
| Translation services | Translator services (selection, literary editing, |
| | validation, layout, proofreading) task amount |
| | within specified period |
| DTP | DTP task amount within specified period |
| Notary certification | Notary certification task amount within specified |
| | period |
| Sworn translator | Task amount assigned to sworn translators (within |
| | specified period) |
| Other task | Other tasks amount within specified period |

Task types



5. Languages



Languages

6. Language combinations

In the table below you can see the description of fields related to languages.

| Column name | Description |
|-----------------------|--|
| Languages | All languages the company has done translation |
| | projects for within specified period |
| Language combinations | All language combinations the company has done |
| | translations for within specified period |

Language pairs



7. Translation fields – the translation field, specified in translation Document window under field "Translation type".



8. Projects per manager – total project quantity, assigned to a specific manager.



9. Projects per branch – total project quantity, assigned to a specific branch.



! Please note that if no branch is specified in the project, the system will not include the project in the branches statistics table.
10. Customers per branch – total quantity of the Customers belonging to a particular branch.



Customers per branch

! Please note that the system counts budget of projects with all statuses.

! Please note that, if no manager is specified in the project, the system will not include the project in the branches statistics table.

5. System documents management

5.1. Invoices

OCLanguage represents a tool for autonomic creation of Commercial Invoices (CI).

After invoice creation, the user can download the created CI either with pre-built signature and stamp () or without them () and send it to the Customer manually or let the system autonomically send the issued invoice to the Customer () (for more information about invoice creation see manuals: "7.7 Ho to issue invoice for project" and "7.8 How to send invoice to Customer").

During implementation process, our specialists will add translation agency company data in the template of invoice. The table below reveals the data that is included in the invoice.

| Data | Description |
|------------------------------|--|
| Logotype and company details | This information is set up during implementation |
| | process |
| Supplier | Translation agency company details |
| Recipient | Customer name, who receives a translated |
| | document |
| Payer | Company or Private person's name, who pays an |
| | invoice |
| Commercial invoice No. | Commercial Invoice number with reference to |
| | invoice date |
| Task # | Task number |
| Service type | Service type, gathered from task details |
| Unit of measure | Choose unit of measure, either of |
| | symbols/document/words/pages |
| Amount | Specified volume of service |
| Price | Price per unit |
| Total | Total price of the task |
| Without VAT | Total payment amount, to which VAT is not |
| | applicable |
| Total services quantity | Total quantity of tasks, included in the invoice |
| Amount in words | Total payment amount in words |
| Issued | Translation agency representative, who signs the |
| | invoice |

Below you can see the sample of invoice.



Zaubes Street 7-2, Riga, Latvia Tel.: (+371) 22332787 Fax: (+371) 67375087 E-mail: info@grafit.lv

Due date: 12.08.2017 Vendor: SIA GRAFTT Registration No: 40003999836 VAT payer code: LV40003999836 Legal address: Stimu 1-84, Riga, LV-1035 Agency address: Zaubes Street 7-2, Riga, LV-1013 A/S SWEDBANK Account No: LV20THABA0551019640120 SWIFT: HABALV22

Payer:

Invoice GR_2069 on 02.08.2017

| No. | Service | Unit | Quantity | Price | Total |
|-----|------------------|---------------------------------------|----------|-----------|-------|
| 1 | Bankas dokuments | Pages | 3.9 | 14 | 54.60 |
| | | 11 - 11 - 11 - 11 - 11 - 11 - 11 - 11 | | Total: | 54.60 |
| | | | | VAT 21%: | 11.47 |
| | | | | In total: | 66.07 |

In total services 1, for amount: 66.07 with VAT Sixty-six point seven EUR



Received:

To manage an invoices list, browse "Documents -> Invoices".



Invoices are revealed in the following system sections:

• Projects

The user can filter data in the Invoices database by using 3 methods:

1. Type letters or numbers in "Search" field and click "Enter"

| NVO tain⇒ Invi | | 5 | | | | | | | |
|-------------------|------|-------------------------|--------------|----------|---------|------------------------------|------------|------------------|--------------------|
| Del | lete | Export Issuance date | Payment date | Deadline | Client | Manager | Price | tii ▼ Comment | SIA OCL Actions |
| | 7 | 21.06.2017 | | 28 | SIA OCL | Alexander | 94.40 EUR | | B © 0 🖬 🖥 |
| | 9 | 21.06.2017 | | 28 | SIA OCL | Isachev Andrey Eduardovitsch | 108.56 USD | | 🖹 🖉 Ø 🖂 📑 📑 |

Below you will see a list of parameters (column names) the system searches data for:

• Issue #

- Customer
- Comment.

! Please note that data filter can be removed by deleting text in "Search" field and clicking "Enter".

2. Filter data by sorting data from A to Z and vice versa by clicking on the column name.

| NVO in → Invo | | 5 | | | | | | | | |
|------------------|-----|---------------|--------------|------------|---------|------------------------------|------------|---------|---|-----------|
| Del | ete | Export | Davmont data | Deadline 🔻 | Client | Magaza | Price | Comment | | Search |
| _ | IN2 | issuance date | Payment date | | Client | Manager | Price | Comment | | Actions |
| | 9 | 21.06.2017 | | 28 | SIA OCL | Isachev Andrey Eduardovitsch | 108.56 USD | | / | 🖹 🛇 🖉 🎦 불 |
| | 7 | 21.06.2017 | | 28 | SIA OCL | Alexander | 94.40 EUR | | | 🖹 🛇 🛇 🖬 🖹 |
| | 10 | 23.06.2017 | | 15 | МТИ | Jegorovs Olegs | 189.98 EUR | | | 🖹 🛛 🔿 🎦 📑 |

3. Review the columns that you want to see in the Invoices table. To add or remove a particular column from the table, simply click and select the columns that you want (or do not want) to view in the Invoices database. This feature is especially relevant, if there are big databases with many columns and/or relatively small monitor/tablet/smartphone screen.

! Please note that the system will save these settings for upcoming user sessions.

| ivoi | ices | | | | | | | |
|----------|------|---------------|------------|---------|------------------------------|------------|---------|---|
| n > Invo | ices | | | | | | | |
| Del | ete | Export | | | | | | |
| | | | | | | | | Ⅲ ▼ Search |
| | N₂ | Issuance date | Deadline 🔻 | Client | Manager | Price | Comment | |
| | 9 | 21.06.2017 | 28 | SIA OCL | Isachev Andrey Eduardovitsch | 108.56 USD | | □ Payment date ☑ Deadline |
| | 7 | 21.06.2017 | 28 | SIA OCL | Alexander 94.40 EUR | | | ✓ Client ✓ Manager |
| | 10 | 23.06.2017 | 15 | МТИ | Jegorovs Olegs | 189.98 EUR | | ✔ Price ✔ Comment ✔ Actions |

The table below reveals the data of columns from invoices section.

| Column name | Description |
|---------------|-----------------------------------|
| Nº | Unique number of invoice |
| Issuance date | Invoice issuance date |
| Payment date | Invoice payment date |
| Deadline | Project deadline (amount of days) |
| Client | Customer name |
| Manager | Manager name |
| Price | Payment amount |

| Comment | Manager's comment related to invoice | | | | | | | | |
|------------------------------|---|---|--|--|--|--|--|--|--|
| Actions | List of actions related to a particular invoice (the system reacts upon click | | | | | | | | |
| | on the icon) | | | | | | | | |
| Save comment (💾) | Comment that one user wants to save | | | | | | | | |
| Invoice paid (🕗) | Mark the invoice as paid by Customer. After clicking the icon, the system will ask, if the user is sure about marking the invoice as paid; reload the page; put the date in "Payment date" column and change icon color from grey to green. | | | | | | | | |
| | ■ № Issuance date Payment date | e Actions | | | | | | | |
| | 3 17.05.2017 17.06.2017 | 🖹 🕗 🖉 🔚 皆 | | | | | | | |
| Invoice cancelled (| Mark the invoice as cancelled. After clicking t if the user is sure about marking the invoice a and change icon color from grey to red. ■ Nº Issuance date | • | | | | | | | |
| | 4 11.06.2017 | 🖹 🖉 🖉 🔛 🖹 | | | | | | | |
| Send invoice over e-mail (M) | Click to send invoice to the Customer's e-mai After clicking the icon, the system will ask, if the the e-mail; reload the page and notification w E-mail was successfi | ne user is sure about sending vill pop up. | | | | | | | |
| View invoice (È) | Open the invoice in .pdf format | | | | | | | | |
| View signed invoice (🖹) | Open the signed invoice in .pdf format | | | | | | | | |

In order to remove a particular invoice, check the box next to the invoice(s) that you want to delete and click "Delete".

Invoices Main > Invoices Search ■ Nº Issuance date Payment date Deadline Client Manager Actions Price Comment test 23.04.2014 05.11.2016 140.00 RUR 🖹 🛇 🖉 🔛 📑 1 MTИ Jegorovs Olegs

In order to export full table of invoices click "Export".

| lr | nvoi | ices | 5 | | | | | | | | |
|-----|------------|-------|---------------|--------------|----------|--------|---------|-------|---------|-------|---------|
| Mai | iin > Invo | lices | | | | | | | | | |
| | Del | ete | Export | | | | | | | III • | Search |
| | | | | | | | | | | | |
| | | N⁰ | Issuance date | Payment date | Deadline | Client | Manager | Price | Comment | | Actions |

The system will autonomically generate .csv file.

| bills_2165810.csv | |
|-------------------|--|
|-------------------|--|

~

| | | • ♂ · ∓ | | F | | л. | ۱r. | 0 | | 2165810.csv - Excel |
|----|---|----------------|--------|---------------|--------------|----------|-------|----------|----------|---------------------|
| Pa | File Home Insert Page Layout Formulas Data Review View Q Tell me what you want to do Image: Second seco | | | | | | | | | |
| | А | В | с | D | E | F | G | н | I | L |
| 1 | N♀ | Manager | Client | Issuance date | Payment date | Deadline | Price | Currency | Status | Comment |
| 2 | OC_1 | Jegorovs Olegs | МТИ | 23.04.2014 | 05.11.2016 | | 140 | RUR | Paid | test |
| 3 | OC_2 | | | 07.07.2014 | 08.12.2016 | | 0 | | Paid | |
| 4 | OC_3 | | | 07.07.2014 | 26.09.2014 | | 0 | | Paid | |
| 5 | OC_1 | | | 12.01.2015 | 22.01.2015 | -833 | 0 | | Issued | |
| 6 | OC_2 | | | 12.01.2015 | 22.01.2015 | -833 | 0 | | Issued | |
| 7 | OC_3 | | | 12.01.2015 | 22.01.2015 | | 2000 | | Annulled | |
| 8 | OC_6 | | | 27.02.2015 | 02.05.2015 | | 49600 | | Paid | |
| 9 | OC_7 | | | 27.02.2015 | 27.02.2015 | | 1200 | | Paid | |

5.2. Purchase orders (PO)

OCLanguage represents a tool for autonomic creation of Purchase Order (PO) document.

The user is able to download created PO and send it to the vendor manually or let the system autonomically send issued POs to the vendor (for more information see "7.14. How to issue PO document for vendor").

PO is adjusted to translation agency template. The table below reveals the data that is included in PO.

| Data | Description |
|------------------------------|---|
| Logotype and company details | Set up during implementation process |
| Task | General document No. (to which this task belongs) |
| | from project details |
| Executor | Vendor, to whom this PO is assigned |
| Date | PO issuance date |
| Price | Price for translation service including information |
| | about task amount |
| Translation | Language pair |
| Deadline | Deadline for task |
| Send e-mail | E-mail address of translation agency for receiving |
| | a translated document |
| Link to document | Link in web browser for downloading the |
| | document |
| Order submitted by | Translation agency manager that has issued and |
| | sent the PO to vendor |
| Order accepted by | Vendor name |

Below you can see the sample of PO document.



www.kiev-bridge.com.ua +38 (044) 587-92-16 +38 (044) 287-11-63

01033, Украина, г. Киев, ул. Саксаганского 39-Б, офис 3

Task

LLC , Reg. No. 40002154241 Rīga, Brīvības 81

Executor: Martin John

Date: 19.07.2017

Price: 80 USD for 4 pages

| Notary approval | | | | | |
|-----------------|---------------|--|--|--|--|
| From language | Into language | | | | |
| English | Hungarian | | | | |

Deadline: 2017-07-20 2017-07-18 Send e-mail:

All information that is provided by the company LLC is highly confidential during the process of the translation and after completion of the project.

Order submitted by: Karlis Order accepted by: Martin John To manage a Purchase orders list, browse "Documents -> Purchase orders (PO)".



Purchase orders are revealed in the following system sections:

• Projects

User can filter data in PO database by using 3 methods:

1. Type letters or numbers in "Search" field and click "Enter"

| Purchase order Main > Purchase order(PO) | ler(PO) | | | | | |
|---|-----------------|---------------|-----------------|-------------|--------------------|---------|
| Delete | | | | | | ENG |
| Issuance date | Document name | Language pair | Project | Executor | Order submitted by | Actions |
| 22.07.2017 | Notary approval | ENG >HUN | % 90-001 | Martin John | Jegorovs Olegs | |

Below you will see a list of parameters (column names) the system searches data for:

- Issuance date
- Document name

- Language
- Project #
- Executor (vendor)
- Order submitted by (manager).

! Please note that data filter can be removed by deleting text in "Search" field and clicking "Enter".

2. Filter data by sorting data from A to Z and vice versa by clicking on the column name.

| | hase order chase order(PO) | r(PO) | | | | | | |
|-----|-------------------------------|----------------------|---------------|-----------------|-------------|--------------------|--------|---------|
| Del | ete | | | | | | ···· • | Search |
| | Issuance date | Document name | Language pair | Project | Executor 👻 | Order submitted by | y | Actions |
| | 22.07.2017 | Notary Certification | - | % 17-001 | Wooden Anna | Jegorovs Olegs | | |
| | 22.07.2017 | Notary approval | ENG->HUN | % 90-001 | Martin John | Jegorovs Olegs | | |
| | 22.07.2017 | Translation_task | - | % 17-001 | | Jegorovs Olegs | | |

3. Review the columns that you want to see in the PO table. To add or remove a particular column from the table, simply click and select the columns that you want (or do not want) to view in the PO database. This feature is especially relevant, if there are big databases with many columns and/or relatively small monitor/tablet/smartphone screen.

! Please note that the system will save these settings for upcoming user sessions.

| Purc | hase order(P | O) | | | | |
|------------|--------------------------|---|---------------|---|----------------------------|---------------------------------|
| Main > Pur | chase order(PO) | | | | | |
| | | | | | | |
| Del | lete | | | | | |
| | | | | | | Ⅲ ▼ Search |
| | Issuance date | Document name | Language pair | Project | Executor 👻 | ✓ Issuance date |
| | | | | | | |
| | 22.07.2017 | Notary Certification | - | % 17-001 | Wooden Anna | ☑ Document name ☑ Language pair |
| | 22.07.2017 22.07.2017 | Notary Certification Notary approval | - ENG->HUN | % 17-001 % 90-001 | Wooden Anna Martin John | |

The table below reveals the data of columns from Purchase orders section.

| Column name | Description |
|---------------|---|
| Issuance date | Invoice issuance date |
| Document name | Translation document name (saved in project |
| | document data window) |
| Language pair | Language pair names |

| Project | Project number (autonomically assigned by the |
|--------------------|---|
| | system) |
| Executor | Vendor name |
| Order submitted by | Manager name |
| Actions | By clicking on flag icon, the system opens a |
| | Purchase order document in .pdf format |

In order to remove a particular Purchase order, check the box next to the purchase order(s) that you want to delete and click "Delete".



5.3. Acts of Acceptance

OCLanguage represents a tool for autonomic creation of Act of Acceptance document.

This section includes all acts that have been created in the project window.

To see how to create a new Act of Acceptance document see user manual "7.9. How to issue Act of acceptance document".

To see how to send an Act of Acceptance to the Customer, see user manual "7.10. How to send Act to Customer".

Act of Acceptance is adjusted to translation agency template. The table below reveals the data that is included in the Act.

| Data | Description |
|------------------------------|---|
| Logotype and company details | Set up during implementation process |
| Act of Acceptance | General document No. (to which this task belongs) |
| | from project details |
| Service name | Project task name |
| Unit | Unit of measure |
| Quantity | Amount |
| Price | Price per unit |
| Total | Total price |
| Without VAT | Amount on which VAT is not chargeable |
| Contractor | Translation agency data |
| Customer | Customer data |

Text in the Act is subject to changes conducted in the program code which are made up upon request by translation agency.

Below you can see the sample of Act of Acceptance document.



www.kiev-bridge.com.ua +38 (044) 587-92-16 +38 (044) 287-11-63

01033, Ukraine, Kiev, Saksaganskogo Street 39-B, office 3

Act of Acceptance #12D Of supplied services (performed tasks) at 17.06.2017

Private enterprise «Translation agency Bridge» on behalf of Director, Maxim Lobachevskiy, (hereinafter "Contractor") from one side and SIA OCL (hereinafter referred to as "Customer"), represented by ______, from other side, agree on this Act, that Contractor supplied Customer with following services (tasks performed):

| # | Service name | Unit | Quantity | Price | Total |
|---|--------------|------|----------|--------------|-------|
| 1 | Translation | Hour | 4.00 | 23.00 | 92.00 |
| | | | | Total: | 92.00 |
| | | | | Without VAT: | - |
| | | | | In total: | 92.00 |

Total quantity of services 1, for total price: 92.00 USD without VAT

By signing this Act, both parties confirm that they have fully met their obligations and do not have any claims to each other (including property, financial or other). The act is made in two copies, one for each party.

| CONTRACTOR: | CUSTOMER: |
|---|-----------|
| Private enterprise "Translation agency Bridge" | SIA OCL |
| Chamber of Commerce A01 #372328 at 15.02.2011. | |
| Company Registration # 37481035, | |
| Bank account: 26001901349162 (OTP Bank), Kiev, MFI 300528 | |
| Address: Kiev, 01033, Saksaganskogo Street 39-B, office 5 | |
| Lobachevskiy M. | Stamp |

To view the Acts, browse "Documents" -> "Acts" in the main menu.



The table below reveals the data of columns from Acts database.

| Column name | Description | | | | | |
|---------------|--|--|--|--|--|--|
| Nº | Act number | | | | | |
| Issue date | Issue date of document | | | | | |
| Language pair | Language pair (from – into) | | | | | |
| Project | Project number (assigned autonomically by | | | | | |
| | system) and link to it | | | | | |
| Total | Total amount in the act | | | | | |
| Customer | Customer name | | | | | |
| Sent | Sent by courier () or e-mail () (if the user clicks courier icon under Actions, the system autonomically marks the act as transferred). After clicking the icon, the system will reload the page, put date in "Sent" column and change icon color from grey to green. | | | | | |
| | Sent Received Actions | | | | | |
| | 17.06.2017 | | | | | |

| Received | Act is signed (): either received signed copy (if the user clicks Act received icon under Actions, the system autonomically marks the act as received) or the Customer signed Act in the office. After clicking the icon, the system will reload the page, put date in "Received" column and change icon | | | | | | |
|--|---|--|--|--|--|--|--|
| | put date in "Received" column and change icon color from grey to green. | | | | | | |
| | Received Actions | | | | | | |
| | Actions | | | | | | |
| | 17.06.2017 🦛 💌 🗹 🖈 🗎 | | | | | | |
| Actions | List of actions related to a particular invoice (the | | | | | | |
| | system reacts upon click on the icon) | | | | | | |
| Act sent by courier (🛲) | Click this option, if the act was sent to the | | | | | | |
| | Customer by courier | | | | | | |
| Act sent by postal service (📼) | Click this option to send the act to the Customer's | | | | | | |
| | address | | | | | | |
| Signed act is received (| Click this option to mark the act as received | | | | | | |
| Ask Customer to sign the act over e-mail (🖉) | Click this option to make the system send e-mail | | | | | | |
| | to the Customer in order to ask for signing the Act | | | | | | |
| | (the system uses the Customer's e-mail for system | | | | | | |
| | documents) | | | | | | |
| View act (🖹) | Click this option to open the act in .pdf format | | | | | | |

Acts are revealed in the following system sections:

• Projects

User can filter data in Acts database by using 3 methods:

4. Type letters or numbers in "Search" field and click "Enter"

| Acts | | | | | | | | | |
|------------|------|------------|---------------|-----------------|------------|----------|------|----------|---------|
| Main > Act | s | | | | | | | | |
| De | lete | Export | | | | | | | HUN |
| | # | Issue date | Language pair | Project | Total | Customer | Sent | Received | Actions |
| | 1D | 21.06.2017 | HUN->ENG | % 95-007 | 120.00 EUR | МТИ | | | a 🛛 🖓 🖹 |

Below you will see a list of parameters (column names) the system searches data for:

- Issue date
- Language
- Project
- Total value of Act
- Customer.

! Please note that data filter can be removed by deleting text in "Search" field and clicking "Enter".

2. Filter data by sorting data from A to Z and vice versa by clicking on the column name.

| ACTS Main > Acts | | | | | | | | | |
|---------------------|---------|------------|-----------------|-----------------|------------|----------|------|----------|-----------|
| Del | ete | Export | Language pair 🔺 | Project | Total | Customer | Sent | Received | Search |
| | # 4D | 21.06.2017 | AZE->AZE | % 95-007 | 161.00 EUR | мти | Sent | Received | |
| | 1D | 21.06.2017 | HUN->ENG | % 95-007 | 120.00 EUR | МТИ | | | a 🛛 🖓 🖹 |
| | 2D | 21.06.2017 | ITA->RUS | % 95-007 | 161.00 EUR | МТИ | | | # 🛛 🖉 着 |
| | 3D | 21.06.2017 | SLO->CZE | % 95-007 | 161.00 EUR | МТИ | | | # 🛛 🖉 🗐 🖹 |

3. Review the columns that you want to see in the Acts table. To add or remove a particular column from the table, simply click and select the columns that you want (or do not want) to view in the Acts database. This feature is especially relevant, if there are big databases with many columns and/or relatively small monitor/tablet/smartphone screen.

! Please note that the system will save these settings for upcoming user sessions.

| cts | | | | | | | |
|--------|-------|------------|---------------|-----------------|------------|----------|--|
| > Acts | | | | | | | |
| | | | | | | | |
| Dele | ete E | (port | | | | | Ⅲ ▼ Search |
| | # | Issue date | Language pair | Project | Total | Customer | ♥ # |
| | 1D | 21.06.2017 | HUN->ENG | % 95-007 | 120.00 EUR | МТИ | ✓ Issue date✓ Language pair |
| | 2D | 21.06.2017 | ITA->RUS | % 95-007 | 161.00 EUR | МТИ | ✓ Project ✓ Total |
| | 3D | 21.06.2017 | SLO->CZE | % 95-007 | 161.00 EUR | МТИ | Customer |
| | 4D | 21.06.2017 | AZE->AZE | % 95-007 | 161.00 EUR | МТИ | Received Actions |

In order to delete a particular Act, check the box next to the act(s) that you want to delete and click Delete.

| Acts | | | | | | | | | | |
|-------------|-----|------------|---------------|-----------|----------|---------------------|------------|---------|-------|---------|
| Main > Acts | | | | | | | | | | |
| Dele | ete | Export | | | | | | ; | III • | Search |
| | # | Issue date | Language pair | Project | Total | Customer | Sent | Receive | ed | Actions |
| | 1B | 31.07.2014 | ENG->UKR | 83-001-01 | 0.00 UAH | Максим Лобачевський | 20.10.2016 | 21.10.2 | 016 | # 🗠 🖓 📄 |

In order to export full table of acts click Export.

| A | cts | | | | | | | | | | |
|------|--------|-----|------------|---------------|-----------|----------|---------------------|------------|------|---------|-----------|
| Mair | > Acts | | | | | | | | | | |
| | Dele | ete | Export | | | | | | | | Search |
| | | # | Issue date | Language pair | Project | Total | Customer | Sent | Rece | eived | Actions |
| | | 1B | 31.07.2014 | ENG->UKR | 83-001-01 | 0.00 UAH | Максим Лобачевський | 20.10.2016 | 21.1 | 0.2016 | # 🔽 🗹 🛃 🗎 |

The system will autonomically generate a .csv file.

| | | 🔊 ac | t_1493896146.csv ^ | |
|----|--------------------------|------------|------------------------------|----------------|
| l | ਜ਼ ਙਾ ੇ | ÷ ∓ | | |
| F | ile Hom | e Insert | Page Layout Formulas Data | a Review |
| | ► K Cut E Copy ste | · . | | ≡ <u>=</u> & |
| | Clipboard | Es. | Font 🕞 | |
| D2 | 2 👻 | : × | <i>√ f</i> _x 0 | |
| | А | В | с | D |
| 1 | Act number | Date | Surname, name / Company name | In total |
| 2 | 1B | 31.07.2014 | Максим Лобачевський | 0 |
| 3 | 2B | 01.08.2014 | Максим Лобачевський | 0 |
| 4 | 3B | 25.09.2014 | Светлана Кондратова | 0 |
| 5 | 4B | 30.10.2014 | Быстрый проект | 0 |
| 6 | 1C | 24.02.2015 | Максим Лобачевський | 0 |
| 7 | 2C | 24.02.2015 | Максим Лобачевський | 0 |
| 8 | 3C | 26.02.2015 | Криотехгаз ООО | 5,000.00 |
| 9 | 4C | 26.02.2015 | Криотехгаз ООО | 5,000.00 |
| 10 | 5C | 27.02.2015 | SIA OCL | 40,000.00 |
| 11 | 6C | 27.02.2015 | SIA OCL | 10,000.00 |
| 12 | 7C | 08.03.2015 | SIA OCL | 40,000.00 |
| 13 | 8C | 08.03.2015 | SIA OCL | 10,000.00 |
| 14 | 9C | 14.03.2015 | Криотехгаз ООО | 6,000.00 |
| 15 | 10C | 14.03.2015 | Криотехгаз ООО | 6,000.00 |

5.4. Agreements with Customers

OCLanguage represents a tool for autonomic creation of agreements with Customers. This document includes information about general agreement templates. You can see the appendices description under "5.5. Appendices to agreements".

To open template for translation agency and Customer agreement take the following steps:

1. Create a new Customer (for detailed explanation see manual "6.1. How to create a new Customer")

2. Open Customer data

| ien › Clier | | | | | | | | |
|----------------|-----|------------------------------|-----------|-----------------|-----------------------|----|----------|----------|
| Dele | ete | Export Add Customer | | | | | | |
| | Nº | Name, surname / Company name | Туре | Active projects | Last project deadline | ₩v | Search | Invoices |
| | 105 | Ланта банк | Leg. ent. | 0 | | | Projects | Invoices |
| | 96 | Мегафон Татарстан | Leg. ent. | 0 | | F | Projects | Invoices |
| | 95 | МТИ | Leg. ent. | 0 | | F | Projects | Invoices |
| | | | | | | | | |

3. Click "Create new agreement". The system will reload the Customer's page and supply the user with Agreement template.

| Requisites | Payment method | Туре | Value |
|---------------------------|----------------------|---------|---------------------|
| | Bank account 🗸 | Счет 🔻 | 3010181040000000348 |
| | Bank account | SWIFT 💌 | COLK RU MM |
| | Add | | |
| Cooperation agreement | ✓ | | |
| Confidentiality agreement | | | |
| Confidentiality agreement | Create new agreement | | I |

4. The system will open an agreement template in new tab. Besides of main content of the agreement, at the end of it the system has included all supplier and Customer predefined details.

| 7. ПОРЯДОК УРЕГУЛИРОВАН 7.1. Все споры и разногласия по настоящему Договору разрешаются Сторонам достижения согласия спор передается на рассмотрение Арбитражного суда по ми | и путем переговоров. В случае невозможности |
|---|---|
| 8. ПРОЧИЕ УСЛОВИ 8.1. Настоящий Договор действителен в течение 1 (одного) года с момента его настоящего Договор ян одна из Сторон не заявит с его прекращения. Догово у ес срок. Факсимильная коник настоящего Договора действительна при наличии 8.2. Договор может быть расторитут или изменен по взаивному согласню Стор настоящего Договора оформилостя доплительным соглавнением. 8.3. В случае устаповления нецелесообразности или невозможности выполнен заинтересованная Сторона представляет письмение о увсромление о досрочном р (илитардиать) календарных дней до предполагаемой даты расторжения. 9. ЮРИДИЧЕСКИЕ АДРЕСА И БАНКОВСКИ | заключения. Если до истечении срока действия игается пролонгированным на тех же условиях на тот оригивальной подписи и печати одной из Сторон. он. Соглашение о расторжении или изменении ия обязательств по настоящему Договору. асторжении настоящего Договора не позднее, чем за 15 |
| 9. ЮГИДИ ЧЕСКИЕ АДГЕСА И ВАПКОВСКІ Исполнитель: | не геконулты стогон |
| ООО «АВП центр», ИНИ 7806430499. КПП 780601001 p/c 40702810501007800626 в филмале «Петровский» ОАО Банк «ОТКРЫТИЕ», г. Санкт-Петербург, кk: 2010181040000000766, БИК 044030766 | |
| Заказчик: | |
| OCL Ltd. Юр.адрес: Riga, Dzelzavas 62/47, LV-1082 Факт.адрес: Riga, Dzelzavas 62/47, LV-1082 ИНН/КПП: Банковские реквизиты: LVHABA79000000002347892348, Bank account | |
| 10. ПОДПИСИ СТОР | он |
| Исполнитель Генеральный директор | Заказчик |
| ООО «АВП центр» | |
| / Тополянский А.П. / | / / |

! Please note that main content is a subject to changes according to translation agency's agreement template. This is processed during OCLanguage implementation stage.

5.5. Appendix to agreement

OCLanguage represents a tool for autonomic creation of appendices to general cooperation agreement with the Customer. This document includes information about particular project that the translation agency has supplied its services for. You can see the description of appendices creation in user manual "7.6. How to issue appendix to agreement".

! Please note that Appendices are created for written translation projects only.

Appendices of agreement are not stored in separate section in the system.

Appendix is adjusted to translation agency template. The table below reveals the data that is included in appendix.

| Data | Description |
|--|--|
| Order No. | Order Number is based on combination of unique Customer and Project number from this Customer |
| Customer | Customer name |
| Contact person | Contact person at Customer's side |
| Customer manager | Responsible manager of this Customer |
| Coordinator of the order | Responsible manager of the order |
| Task deadline | Deadline for the Customer |
| Task type | For written translation the system has 5 predefined task types: Translation (including sworn translator) Translator services (selection, literary editing, validation, layout, proofreading) DTP Notary certification Other task. |
| Language pair | Order language pair |
| Amount | Amount of task |
| Total price for Customer | Total price for written translation |
| Discounts and surcharges | All discounts and surcharges for written translation project |
| Preliminary price for whole project | Specified preliminary project price (on the 1st stage of project management, when the user saves general data) |
| Amount in words | Amount in words (the system will provide data autonomically) |
| The total price of order is counted, based on Acts of Acceptance | This text is adjusted to translation agency needs |

6. Customers

6.1. How to create a new Customer

In order to create a new Customer follow the below steps:

1. Browse "Customers" table

| | OCLanguage 7.0 | | | | |
|---|---|--|--|--|--|
| | Navigation | | | | |
| | Projects | | | | |
| | 🖶 Customers | | | | |
| | 🞓 Translators | | | | |
| | 🖌 Designers | | | | |
| | 🔦 Notaries | | | | |
| | | | | | |
| - | Design of the second | | | | |

2. Click "Add Customer"



3. Register either a legal entity or an individual

| New client | | | |
|-----------------------------|------|----------------|--|
| Main > Clients > New client | | | |
| | | | |
| | Туре | Legal entity 👻 | |
| | N₂ | Legal entity | |
| | TN2 | Individual | |

4. Fill in the fields and click "Save".

| Manager | Ponomarenko Ilya Vladimirovitsch 🔹 |
|---------|------------------------------------|
| | Add |
| Comment | New Customer from Vienna |
| | |
| | |
| | |

Save

! The system will accept the registration of the new Customer only if all obligatory boxes are filled.

Fill in the following fields in order to register a legal entity:

| Field | Description |
|------------------|---|
| No. | The system automatically generates a new Customer number (first available number in Customer stack) |
| Company name | Legal name of the company |
| Registration No. | Company Registration No. |
| VAT | Company VAT No. |
| Country | Country, where the company is registered/based |
| Actual address | Actual address of the company |
| Legal address | Legal address of the company |
| ZIP | Postal code |
| Contact info | Contact data of the Customer |
| | Let's stress "E-mail for invoices" field – e-mail address the system will send all invoices to. |
| | Click "Add" to add more contact data. |
| Contact persons | Contact persons at Customer's side |
| | Click "Add" to add more contact persons. |
| Requisites | Company requisites |

| Cooperation agreement | Mark if a cooperation agreement between the translation agency and it's Customer is signed |
|---------------------------|--|
| Confidentiality agreement | Mark if a confidentiality agreement between the translation agency and it's Customer is signed |
| Invoice due dates | Allowance for credited payment |
| Discounts | Discount amount for projects (%) |
| Branch | Branch where the Customer is served |
| Manager | Responsible manager of this Customer Click "Add" to add one more account manager |
| Comment | Field for making notes about the Customer |

Fill in following fields in order to register an individual:

_

| Field | Description |
|-----------------|---|
| No. | The system automatically generates a new Customer number (first available number in Customer stack) |
| Name | Person's name |
| Surname | Person's surname |
| Gender | Person's gender |
| Personal code | Individual tax payer number |
| Date of birth | Person's birthday |
| Personal data | Person's passport number |
| Country | Customer's residence country |
| Actual address | Actual address of the person |
| ZIP | Postal code |
| Contact info | Contact data of the Customer |
| | Let's stress "E-mail for invoices" field – e-mail address the system will send all invoices to. |
| | Click "Add" to add more contact data. |
| Contact persons | Contact persons at Customer's side |
| | Click "Add" to add more contact persons. |

| Requisites | Individual's requisites |
|---------------------------|--|
| Cooperation agreement | Mark if a cooperation agreement between the translation agency and it's Customer is signed |
| Confidentiality agreement | Mark if a confidentiality agreement between the translation agency and it's Customer is signed |
| Invoice due dates | Allowance for credited payment |
| Discounts | Discount amount for projects (%) |
| Branch | Translation agency's branch, where this Customer places orders |
| Manager | Responsible manager of this Customer |
| | Click "Add" to add one more account manager |
| Notes | Field for notes on the Customer |

6.2. How to edit or delete Customer's data

In order to open the Customers table click "Customers" in the navigation pane and take the following steps:

1. In the table the user can see all Customers. Click the one you would like to edit or delete (click on the text).

| ier | | | | | | | |
|-----|----------|------------------------------|-----------|-----------------|-----------------------|----------------|--------------|
| Del | ete | Export Add Customer | | | | Ⅲ ▼ Sea | arch |
| | N₂ | Name, surname / Company name | Туре | Active projects | Last project deadline | Projec | ts Invoices |
| | 105 | Ланта банк | Leg. ent. | 0 | | Proje | cts Invoices |
| | | | 208.010 | 0 | | Proje | |
| | 96 | Meraфон Татарстан | Leg. ent. | 0 | | Proje | |
| | 96 95 | | - | | | | cts Invoices |

2. The system will open "Main information" window, where the user can see some of the main data about the Customer. Edit the information in fields and click "Save".

| Manager | Add |
|---------|----------------------------|
| Comment | Edited contact information |
| | |
| | |
| | |
| | |
| | |

If you would like to remove the Customer's record, click "Delete".

| Manager | Add |
|---------|----------------------------|
| Comment | Edited contact information |
| | |
| | |
| | |
| | L |
| | Save Delete |

! Please remember that Customer's deletion will not incur project related data deletion. It means that any projects that were created under this Customer before the deletion will be stored in the system.

6.3. Customers table

In order to open the Customers table click "Customers" in the navigation pane.



User can sort Customers data using three methods:

- Filtering data by column
- Quick Search
- Sorting needed columns.

User can filter the table while clicking the column names. The system will automatically sort the records according to the filter specified.



In order to use Quick search option just type in the symbols, words or numbers, click Enter and the system will supply the user with appropriate records. The system will search according to the Customer name only.

| ier | | | | | | | |
|------|-----|------------------------------|--------|-----------------|-----------------------|-----------------|----------|
| Dele | ete | Export Add Customer | | | | Ⅲ • ward | |
| | N₂ | Name, surname / Company name | Туре | Active projects | Last project deadline | Projects | Invoices |
| | 94 | Ward James | Indiv. | 0 | | Projects | Invoices |

! Please note that Quick search is relevant only for searching data from the Customers' page currently opened. For example, if the user has opened the 1st page of the table and tries to search for data stored in the 5th page, the system will NOT bring up any data.

Review the columns that you want to see in the Translation domains table. To add or remove a particular column from the table, simply click and select the columns that you want (or do not want) to view in the Domains database. This feature is especially relevant, if there are big databases with many columns and/or relatively small monitor/tablet/smartphone screen.

! Please note that the system will save these settings for upcoming user sessions.

| en | | | | | | |
|------|-------|------------------------------|-----------|-----------------------|---------------------------|-----|
| Dele | ete i | Export Add Customer | | | III - SIA OCL | |
| | N₂ | Name, surname / Company name | Туре | Last project deadline | Projects ♥ Ne | |
| | 65 | SIA OCL | Leg. ent. | 02.07.2017 | Pro name, surname / Comp. | any |
| | | | | | 🗷 Type | |
| | | | | | C Active projects | |
| | | | | | C Last project deadline | |
| | | | | | ✓ Projects | |
| | | | | | Invoices | |

 Clients

 Main → Clients

 Delete
 Export

 Add Customer

 Image: Ne
 Name, surname / Company name

 Type
 Active projects
 Last project deadline

 Projects
 Invoices

 94
 Ward James
 Indiv.

Upon request the system will serve the user with an .xls file that consists of the following data.

| Excel Column name | Description | | | | |
|-------------------|--------------------|--|--|--|--|
| Number | Customer unique ID | | | | |

Click "Export" to export data to Microsoft Excel.

| Branch | Translation agency's branch name, i. e. the office, |
|------------------------------|---|
| | which handles orders from a particular Customer |
| Туре | Customer type (choose between Individual and |
| | Legal entity) |
| Surname, name / company name | Customer initials |
| Registration date | Date, when the Customer account was created |
| Last project submission date | Date, when the last project was submitted to the |
| | Customer |
| Mobile phone | Customer's mobile phone number |
| Phone | Customer's phone number |
| E-mail | Customer's e-mail address |
| Country | Country of residence |
| Address | Customer's address |

| ⊟ চে∙ ় | | | | c | lients_6867066 - E | Excel | | | | | | | Ŧ |
|---------------------------|----------------------|------------------------|-----------------|---------------------|--------------------|----------------|--------------------------|----------|---------|---------------|-------------|-----------------------|--------|
| File Home | Insert Page Layout | Formulas Data | Review Vie | w 🛛 🛛 Tell me what | you want to do | | | | | | | | |
| Paste ↓ ✓ Format Paint | | | | Wrap Text | General | • •.0 .00 C | Conditional ormatting | | | Insert Dele | | ∑ AutoSum ↓ Fill ▼ | Sort & |
| Clipboard | ra Font | Gi I | Alignme | ent G | Number | G. | | Styles | | Cel | s | Ec | diting |
| K2 - : | × √ ƒx Albe | ert Cuypstraat 75, 107 | 72 CN Amsterda | am | | | | | | | | | |
| A B | C D | | E | F | | G | н | 1 | J | | K | | |
| 1 Number Branch | Type Surname, name / | Company name Rep | gistration date | Last project submis | sion date Mob | oile phone | Phone I | E-mail (| Country | Address | | | |
| 2 94 Riga | ndiv. Ward James | | 20.08.2015 | | | | | 1 | NLD | Albert Cuypst | raat 75, 10 | 72 CN Amster | dam |

The Customers table is very flexible in terms of tailoring the selected data according to translation agency needs. Any column can be removed or edited up to translation agency request to developers of OCLanguage.

The Customers table consists of the following columns.

| Column | Description |
|-----------|--|
| name | |
| No. | Customer number in stack, issued by the system |
| Name, | Customer initials |
| surname / | |
| company | |
| name | |
| Туре | Customer type – Individual or Legal entity |
| Active | Quantity of active projects. A project is considered as active, if the project status is "In |
| projects | progress" (Proejct overview window). |
| Last | The system shows a deadline of last project for result file submission to the Customer |
| project | |
| deadline | |
| Projects | Link to Customer's projects |
| Invoices | Link to Customer's invoices |

7. Project management

7.1. How to add a new written translation project

To create a new written translation, go through the following steps:

1. Under the main menu click "Projects".



2. Click "Add project".



2. Choose "Written" project type and fill other fields.

| Projects Main > Projects > New project | | |
|---|--------------|-----------------------|
| | Status | Awaiting confirmation |
| | Project name | Alpha project |
| | Туре | Written 👻 |

| Field | Description |
|-----------|---|
| Project # | Unique project number in projects database |
| Status | Project can be in one of the below stated statuses: |
| | Awaiting confirmation |

| | In progress |
|-----------------------------|---|
| | Issued invoice |
| | Paid |
| | Cancelled |
| | Delivered |
| | Evaluating |
| | Finished |
| | Achieved. |
| | ! All project statuses are set up manually. None of |
| | them are changed automatically. Which means |
| | the user should maintain a correct project status |
| | by himself. |
| Project name | Specify project name |
| Туре | Oral/written translation project |
| Deadline | General deadline of project submission to the |
| | Customer |
| Order confirmed by Customer | Check the box, if the Customer has confirmed his |
| | order of particular project |
| Meets Customer requirements | Check the box to approve the statement above. |
| | Relevant, if the Customer sets up specific |
| | requirements that have to be met |
| Call, when order is ready | Check the box, if a call is needed upon submission |
| | of the final version of document |
| Customer | Specify the Customer's name |
| Manager | Specify translation agency's manager name |
| Notes, requests | Any specific notes or requests from the |
| | Customer's side like the ones below: |
| | Columns |
| | Print |
| | |
| | Apostille |
| | High quality |
| | Track changes. |
| Submission method | Specify which submission method is expected |
| | from the Customer's side: |
| | • E-mail |
| | • Fax |
| | In office |
| | Courier |
| | CD/DVD |
| | By post |
| | In the notary's office. |
| Budget | Estimated total project budget |
| Advance payment | The amount of advance payment to be made |
| | before the order execution |
| Discount (%) | The amount of discount in percentage |
| | |

| | ! Please note that OCLanguage permits to set a discount and assign it to the Customer, Customer's project and task, belonging to the project. See more information in document "7.11. Discount management" |
|--------------------------|--|
| Payment method | Specify the payment method. Check the box, if any of payment methods are relevant to the project: Cash Receipt Invoice Free of charge. |
| Documents left in office | The amount and notes about translation related documents (originals, translated copies, notary-approved copies etc) |
| Comment | Make notes of the project |

3. Click "Save" to finish the creation of a new written translation project.

Comment

New Customer from CIS region



Once the user has saved the project, the system automatically opens a general management window with options of adding new tasks for translation, issuing invoices, acts and POs.

7.2. Management of existing project

To open the project data click "Projects" in the main menu.



To study scrutinized description of project table browse for user manual "7.18. Project table".

To open a management window of particular project, click the particular record.

| roje | ects | | | | | | | | |
|-----------------|---------|--------------|-------------------------------------|-------------------|------------------------|-----------------------------|------------------------|---------------------|--------|
| Main > Projects | | | | | | | | | |
| Dele | ete Add | project | | | | | | | |
| | ete Auu | project | | | | | | | |
| | | project | | | | | | III • | Search |
| | Project | Project name | Deadline for Customer | Internal deadline | Туре | Status | Customer | Ⅲ → Manag | |
| | | | Deadline for Customer 04.07.2017 | Internal deadline | Type Written | Status Awaiting confirma | Customer Smith John | | |

General project management window supplies the user with options of adding new tasks for translation, issuing invoices, acts, POs and appendices.

| Proj_ Main > Proj | _12 ects → Project review | , | |
|----------------------|------------------------------|----------------------|----------------------------------|
| Project | Tasks 🚺 | Purchase orders (PO) | Acts of Acceptances Invoices |
| | | | |
| | | Project # | 90-002 |
| | | Status | Awaiting confirmation |
| | | Project name | Proj_12 |

To see how to issue the Act of Acceptance document for Customers, browse documentation "7.9. How to issue Act of acceptance document".

To see how to issue an Appendix to Agreement, browse user manual "7.6. How to issue appendix to agreement". This document is generated automatically and is supposed to be used for documenting the legal terms of project.

To see how to issue a PO (Purchase order) document, browse user manual "7.14. How to issue PO document for vendor". PO document stands for purchase of services order from vendor.

To see how to issue an invoice to the Customer, browse user manual "7.7. How to issue invoice for project".

To see how to issue an agreement of cooperation between the Translation agency and the Customer, browse user manual "5.4. Agreements with Customers".

7.3. How to add task

Take the following steps in order to add a task:

1. Open the project data and click "Projects" in the main menu.



2. Click a particular project.

| Projects | | | | | | | | | |
|-----------------|---------|---------------|-----------------------|-------------------|---------|-------------------|------------|-------------|--------|
| Main > Projects | | | | | | | | | |
| Del | ete Add | project | | | | | | ···· | Search |
| | Project | Project name | Deadline for Customer | Internal deadline | Туре | Status | Customer | Mana | ger |
| | 90-001 | Alpha project | 26.07.2017 | | Written | Awaiting confirma | Smith John | Karlis | |

3. Click tab "Tasks" to open Task window.

| | B Project | | | |
|---------|-----------|------------------------|-----------------------|------------|
| Project | Tasks 🚺 | Purchase orders (PO) 2 | Acts of Acceptances 1 | Invoices 0 |

4. Click "Add task".
| | a project | | | |
|---------|-----------|------------------------|-----------------------|------------|
| Project | Tasks 1 | Purchase orders (PO) 2 | Acts of Acceptances 1 | Invoices 0 |
| N | ew task | | | |
| | | | | |

5. Fill in the task data.

Document task has the following data that the user has to provide.

| Field | Description |
|------------------|--|
| Task name | Specify task name. |
| | ! Please note that the task name is revealed in invoices for Customers and PO documents for vendors. |
| Task type | Specify task type: |
| | Translation Translator service (selection, literary editing, validation, layout, proofreading) – if translator service is selected, then the system allows to choose original language only DTP Notary certification Sworn translator Other task. |
| | ! Please note that according to the task type specified the system automatically supplies the user with available vendors. See more information in user manual "7.4. Task type". |
| From language | Specify from which language the translation will be performed |
| Into language | Specify into which language the translation will be performed |
| Translation type | Specify translation type – choose either from options: |
| | Technical Legal Economics Medicine |

| | CustomsSciencePersonal. |
|-------------------------------------|--|
| Vendor | List of vendors, which are able to handle the above specified task |
| | In case of translators the system will bring up only those vendors, whose availability status is positive. |
| Urgency | Specify if the task is urgent or not (choose between 2 options: regular or urgent). |
| Deadline for Customer | Specify deadline of task for the Customer |
| Deadline for vendor | Specify deadline of task for the vendor |
| | ! Please note that the user is able to set up 2 deadlines: for project and task. If the user has set up a deadline for the whole project, then it always reminds about general deadline, when the user is about to create a new task or document. |
| Amount for Customer | Specify amount of task for the Customer (units of measure – characters, words, pages, documents) |
| Use this amount in invoice | Check this box, if you plan to show the total amount (for example, 4 pages for price 5\$/page with total amount of 20\$) in the invoice for the Customer |
| Amount for vendor | Specify amount of task for the vendor (units of measure – characters, words, pages, documents) |
| Budget of task per Customer – price | Click to select price list (price list creation and management is described in user manual "7.5. How to add new pricelist") |
| Price | If the user has chosen a price list, the system will autonomically reveal the total price for the Customer (multiplication of Total amount and price for unit of measure). |
| Project budget | Total budget of project |
| No discount available for this item | Check the box, if you don't want to grant discount for a particular task. |
| Payment to vendor – price | The system autonomically reveals the price for vendor service per unit of measure. |

| Price | System autonomically calculates the total amount for vendor (multiplication of Total amount and price for vendor service per unit of measure). The user is always able to revise the honorarium amount. |
|---------------------------------|--|
| Full amount paid to vendor | Check the box, if the translation agency has processed full amount of honorarium (this parameter is maintained manually). |
| Translator's approval | Check the box, if a translator approved, that he would handle a particular task. |
| Working materials | Upload working materials that are used to prepare the required task. |
| | Drag and drop files to upload them into OCLanguage. Alternative option is to click on the field and find a needed file via local computer directories. |
| Documents for Customer | Upload a result file that is submitted to the Customer. |
| | Drag and drop files to upload them into OCLanguage. Alternative option is to click on the field and find a needed file via local computer directories. |
| Technical requirements | Specify technical requirements related to the task. |
| Information for vendor | Specify information for the vendor related to the task. |
| | Please note that this field is for translation agency's internal use only. The information is NOT included in Purchase Order (PO) document. |
| Comment | Provide additional comments, if needed. |
| Work evaluation | Provide a mark to the vendor from –2 to +2 to evaluate quality of the performed task. |
| Include task in invoice and act | Check the box, if you want to include this task in the invoice and Act of acceptance. Once these changes are saved, the system will automatically include it into the invoice. Every task equals to a line in the invoice. |
| Completed | Check the box, if the task was fully completed. |

6. Click "Save".

| Work evaluation | (+2) - Excellent | • |
|---------------------------------|--------------------------------------|-------|
| Include task in invoice and act | | |
| Completed | | |
| | | |
| | | |
| | Add t | ask |
| | Save Issue agreement Issue invoice D | elete |

7.4. Task type

Based on task type the system supplies the user with relevant task executors or vendors.

| Alpha project | | | | | |
|--------------------------------------|--------------------------------------|--|--|--|--|
| Main > Projects > Project review | | | | | |
| Project Tasks 3 Purchase orders (PO) | Acts of Acceptances (4) Invoices (3) | | | | |
| | | | | | |
| Notary approval | ~ × | | | | |
| | | | | | |
| Task name | Notary approval | | | | |
| Task type | Translation 🔹 | | | | |
| | Translation | | | | |
| From language | Translator services | | | | |
| Into language DTP | | | | | |
| | Notary certification | | | | |
| Translation type Sworn translator | | | | | |
| Vendor | Other task | | | | |

Below you will find the description of every task type:

1. Translation – the system automatically brings up all translators, which comply with the following requirements:

- Language pair stipulated in relevant Document data is the same as the particular translator is able to provide. In other words, if the translator is able to do written translation from English into German and the particular project is about translating a written document from English into German, then the system will automatically include this vendor as sufficient for handling the task.
- Translator is available for doing translation. The availability of a translator is managed in translators' section in translator's account card manager checks the availability box, if the translator is able to handle translation projects.

2. Translator service – the system automatically supplies the manager with available vendors list, which comply with the following requirements:

- Language pair stipulated in relevant Document data is the same as the particular proofreader is able to provide. In other words, if the proofreader is able to do proofreading of a translation from English into German and the particular project is about translating a written document from English into German, then the system will automatically include this vendor as sufficient for handling the task.
- Translator is available for doing this task (either of selection, literary editing, validation, layout, proofreading). The availability of a proofreader is managed in translators' section

 in translator's account card the manager checks the availability box, if the proofreader is able to handle translation projects.

! Please note that the information about translator service providers is stored in the same section of translators.

| Languages | Type Written ▼ Price (Regular/Urgent) Written ▼ Price (Regular/Urgent) Written ▼ Price (Regular/Urgent) Price (Regular/Urgent) | | From language German 2.00 | | Into language Russian 4.00 | | Language proficiency Highest level (C2) USD | |
|---------------|--|---------|---------------------------------|------------------|----------------------------|------|---|--------|
| | | | | | | | | |
| | | | | | | | | |
| | | | English | • | Russian 💌 | | Highest level (C2) 🔹 | |
| | | | 2.50 Latvian • 2.40 | | 4.50 Russian • 4.00 | | USD Highest level (C2) USD | |
| | | | | | | | | |
| | | | | | | | | |
| | Written | • | French | • | Russian | • | Highest level (| (C2) 🔻 |
| | Price (Regular/Urgent) | | 3.00 | | 5.00 | | USD | • |
| | Add | | | | | | | |
| Other service | Language | Type of | service | Price (Regular/U | rgent) | | | |
| | English 🔹 | Proofr | reading 🔹 🔻 | 2.00 | | 3.50 | | USD 🔻 |
| | Latvian 🔹 | Proofr | reading 🔹 | 2.50 | | 4.00 | | USD 🝷 |
| | German 🔹 | Layou | t v | 3.00 | | 4.00 | | USD 🔻 |
| | Add | | | | | | | |

3. DTP – the system automatically supplies the manager with a list of designers. System will include all designers, whose status is "Available". Similarly as with translators and proofreaders, designers' availability status is maintained in Designers subsection (under Resources section).

4. Notary certification – the system automatically supplies the manager with a list of notaries. Since the notary account card consists of relatively small amount of data, there is no filter of selecting the notaries for notary certification. In other words, the system will bring up all notaries to handle notary certification task, no matter what language pair is set up.

5. Sworn translator – for this task type the system automatically brings up all translation agency manager accounts.

6. Other task – for this task type the system automatically brings up all translation agency manager accounts.

! If the translation agency lacks task type, it can be added upon request in a form of raising a system functionality development task to OCLanguage Support team.

7.5. How to add new pricelist

Pricelist section is created for conducting full automation of initial pricing quote release. The translation agency manager is able to add as many pricelists, as it needs. Pricelists can be assigned to language pair and/or the Customer. In fact, one Customer could be having several pricelists for the same language pair.

! Please note that a pricelist will pop up in project task only if the pricelist currency and project currency are the same.

In this section we will look at two types of pricelists:

- 1) Pricelists for oral and written translation, DTP and Notary approval
- 2) Pricelist for translator services (literary editing, validation, layout, proofreading).

For both aforementioned task groups the system has corresponding predefined honorarium rates for the vendor.

| Languages | Туре | From language | | Into language | | Language profi | ciency | |
|---------------|------------------------|----------------|------------------|---------------|------|--------------------|--------|---|
| | Written | German | • | Russian | • | Highest level (| (C2) | • |
| | Price (Regular/Urgent) | 2.00 | | 4.00 | | USD 🗸 | | - |
| | Written | English | - | Russian | • | Highest level (| (C2) | - |
| | Price (Regular/Urgent) | 2.50 | 2.50 | | 4.50 | | USD 🗸 | |
| | Written | Latvian | Latvian 💌 | | • | Highest level (C2) | | • |
| | Price (Regular/Urgent) | 2.40 | 2.40 | | 4.00 | | USD 🗸 | |
| | Written | French | • | Russian | • | Highest level (| (C2) | • |
| | Price (Regular/Urgent) | 3.00 | 3.00 | | 5.00 | | USD 👻 | |
| | Add | | | | | | | |
| Other service | Language Type | ofservice | Price (Regular/L | Irgent) | | | | |
| | English 🔻 Pr | oofreading 🔹 🔻 | 2.00 | | 3.00 | | USD | • |
| | Latvian 🔻 Pr | oofreading 🔹 | 2.50 | | 4.00 | | USD | - |
| | German 💌 La | yout 👻 | 3.00 | | 4.00 | | USD | - |
| | Add | | | | | | | 1 |

7.5.1. Oral and written translation, DTP, Notary approval

To add a new pricelist, follow the below steps:

1. In the navigation pane, click "Configuration -> Pricelists".



2. Click "Add pricelist". The system will open a new pricelist window.



3. Fill in the pricelist related fields, which are described in the table below.

| Field | Description |
|-------|--|
| Туре | Choose either of available task types: |

| Urgency | Written translation Oral translation DTP Notary certification Sworn translator Other task. Choose either of two options: Regular Urgent. ! Please note that the urgency status is directly connected with the urgency status in task data. |
|-------------------|---|
| From language | Choose the language from which the translation will be processed |
| Into language | Choose the language into which the translation will be processed |
| Unit of measure | Choose either of options: Characters Words Pages Documents Hours. |
| Price | Specify price per unit. |
| Currency | Choose currency. |
| Customer | In order to choose the Customer type in any of the following details related to him: Customer name/surname Company name Contact details. |
| | Customer field is interactive, so after typing in the first letters or numbers the system will automatically bring up a relevant Customers' list. |
| Short description | Provide a short name or description of this pricelist. When the manager creates a new task in case of more than 1 pricelist that fits the translation data, the manager will be able to separate pricelists by using its names. |
| Status | Check the box, if you want this pricelist to be applied. |

4. Click "Add" to save the pricelist.

| rrection | | | |
|------------------------|-------------------|------------------|---|
| ricelists > Correction | | | |
| | | | |
| [| Туре | Oral translation |] |
| | Urgency | regular | |
| | From language | Italian | |
| | Into language | English | |
| | Unit of measure | hours 💌 | |
| | Price | 23.00 | |
| | Currency | USD 🗸 | |
| - | Customer | | - |
| | Short description | | |
| | Status | | |
| | | | |
| | | | |

7.5.2. Translator service

To add a new pricelist for any of four translator services (literary editing, validation, layout and proofreading), follow the below steps:

1. In the navigation pane, click "Configuration -> Pricelists".



2. Click "Add pricelist". The system will open a new pricelist window.



3. Fill in the pricelist related fields, which are described in the table below.

| Field | Description |
|-------|--|
| Туре | Choose either of available task types: |

| Type of service | Written translation Oral translation DTP Notary certification Sworn translator Other task. Choose either of translator services types: Selection Literary editing Validation Layout Proofreading. |
|-----------------|--|
| | ! Please note that for translation services the user specifies "From language", but not "Into language" parameter. |
| Urgency | Choose either of two options: Regular Urgent. ! Please note that the urgency status is directly |
| | connected with the urgency status in task data. |
| From language | Choose the language from which the translation will be processed. |
| Into language | Choose the language into which the translation will be processed |
| Unit of measure | Choose either of options: Characters Words Pages Documents Hours. |
| Price | Specify price per unit. |
| Currency | Choose currency. |
| Customer | In order to choose the Customer type in any of the following details related to him: Customer name/surname Company name Contact details. Customer field is interactive, so after typing in the first letters or numbers the system will |

| | automatically bring up a relevant Customers' list. |
|-------------------|---|
| Short description | Provide a short name or description of this pricelist. When the manager creates a new task in case of more than 1 pricelist that fits the translation data, the manager will be able to separate pricelists by using its names. |
| Status | Check the box, if you want this pricelist to be applied. |

4. Click "Add" to save the pricelist.

User can filter data in the Pricelists database by using 3 methods:

1. Type letters or numbers in "Search" field and click "Enter".

| | elists | | | | | | | | |
|----|-----------------------------|--------------------|--------------------------|--------------------------|--------------------------|---------------|-----------------|---------------------|------------------|
| | | | | | | | | | |
| De | lete Add pricelist | | | | | | | III • | SIA OCL |
| | | | | | | | | | |
| _ | Туре | Urgency | From language | Into language | Unit of measure | Price | Currency | Customer | Status |
| | Type Written translation | Urgency regular | From language English | Into language Russian | Unit of measure words | Price 0.10 | Currency USD | Customer SIA OCL | Status Active |
| | | | | | | | | | |
| | Written translation | regular | English | Russian | words | 0.10 | USD | SIA OCL | Active |

Below you will see a list of parameters (column names) the system searches data for:

- Price
- Currency
- Customer
- Language.

! Please note that data filter can be removed by deleting text in "Search" field and clicking "Enter".

2. Filter data by sorting data from A to Z and vice versa by clicking on the column name.

| rice | elists | | | | | | | | | | |
|------------|-----------------------------|---------|---------------|--------------------------|-----------------|--------------|----------|---------------------|--------------|------------|------------------|
| in > Price | elists | | | | | | | | | | |
| | | | | | | | | | | | |
| Del | ete Add pricelist | | | | | | | | | | |
| | | | | | | | | | III • | Search | |
| | | | | | | | | | | are arrent | |
| | Туре | Urgency | From language | Into language | Unit of measure | Price 🔺 | Currency | Customer | | 2000 | Status |
| | Type Written translation | Urgency | From language | Into language Russian | Unit of measure | Price ▲ 0.05 | Currency | Customer SIA OCL | | | Status Active |
| | | | | | | | - | | | | |

3. Review the columns that you want to see in the Pricelists table. To add or remove particular column from the table, simply click and select the columns that you want (or do not want) to view in the pricelists database. This feature is especially relevant, if there are big databases with many columns and/or relatively small monitor/tablet/smartphone screen.

! Please note that the system will save these settings for upcoming user sessions.

| Ce | elists | | | | | | |
|------|---------------------|---------|---------------|---------------|-----------------|-------|--|
| Dele | ete Add pricelist | | | | | | III - Search |
| | Туре | Urgency | From language | Into language | Unit of measure | Price | ✓ Type |
| | Written translation | regular | English | Russian | words | 0.10 | Urgency From language |
| | Oral translation | regular | Ukrainian | English | hours | 15.00 | Into language Unit of measure |
| | Written translation | regular | English | Russian | characters | 0.05 | Price |
| | Written translation | regular | English | Russian | characters | 0.06 | Currency |
| _ | Written translation | regular | Bulgarian | Belarusian | pages | 24.00 | Status |

See below the Pricelists table content description:

| Parameter | Description |
|-----------------|--|
| Туре | Translation task type: |
| | Written translation |
| | Oral translation |
| | Translator service |
| | • DTP |
| | Notary certification Sworn translator |
| | Other task. |
| | |
| Urgency | Translation task urgency: |
| | Regular |
| | • Urgent. |
| | Please note that the urgency status is directly |
| | connected with the urgency status in task |
| | data. |
| From language | Language from which the translation will be |
| | processed. |
| Into language | Language into which the translation will be |
| | processed. |
| Unit of measure | Measurement options: |
| | Characters |
| | Words |

| | PagesDocumentsHours. |
|----------|---|
| Price | Price per unit. |
| Currency | Currency in which the pricelist is set up. |
| Customer | Customer that the pricelist is assigned to. |
| Status | Choose either between both pricelist statuses: Active Inactive. |

When a new task is added for parameters (language pair, urgency and general status) that the system has pricelists for, right after filling the task type and urgency data the manager will see available pricelists in "Budget for task" field. For particular task budgeting purpose the user should choose one of the available pricelists.

| Translation | | ~ × |
|-----------------------------|-----------------------------------|----------|
| Task name | Translation | |
| Date | 20.06.2017 | # |
| Time | 10:00:00 | |
| From language | Italian | * |
| Into language | English | • |
| Vendor | Stratelli Mia | • |
| Urgency | regular | • |
| Translation type | Other | • |
| Hours | 4.00 | |
| Budget of task for Customer | | |
| | Price Select price list 23.00 USD | |
| | Project budget 140.00 USD | |

7.6. How to issue appendix to agreement

OCLanguage represents a tool for autonomic creation of appendices to general cooperation agreement with the Customer. This document includes information about particular project that the translation agency has supplied its services for.

To create a new appendix to the corporate agreement go through the following steps:

1. Under the main menu click "Projects".



2. Click particular project.

| Pr | oje | ects | | | | | | | | |
|------|--------|---------|----------------------|-----------------------|-------------------|---------|-------------------|------------|--------|--------|
| Main | > Proj | ects | | | | | | | | |
| 1 | Del | ete Add | proj e ct | | | | | | III • | Search |
| | | Project | Project name | Deadline for Customer | Internal deadline | Туре | Status | Customer | Mana | ger |
| | | 90-001 | Alpha project | 26.07.2017 | | Written | Awaiting confirma | Smith John | Karlis | |

3. The system will open the project details.

| | a projec ects → Project reviev | | | | | |
|---------|-----------------------------------|----------------------|-------|-----------------------|------------|--|
| Project | Tasks 🚺 | Purchase orders (PO) | 2 | Acts of Acceptances 1 | Invoices 0 | |
| | | | | | | |
| | | Project # | 90-00 | 01 | | |
| | | Status | Awai | ting confirmation | | |
| | | Project name | Alph | a project | | |

4. Click "Issue agreement".



The system will generate a document in .pdf form and open it in a new tab.

Appendix creature module is used on case-by-case basis, thereby similarly to agreements, appendices are not stored in a separate system section.

Detailed information about the structure of the above described document can be found in user manual "5.5. Appendix to agreement".

7.7. How to issue invoice for project

The system allows the user to create many tasks for the translation project. However, in the background it is still possible to issue various types of invoices. The system allows issuing one or several invoices for one project. Everything is tailored to the Customer's needs.

The manager should take the following steps to issue an invoice for the project:

1. Under the main menu click "Projects".



2. Click the project you want issue an invoice for.

| Pr | ⁻oj€ | ects | | | | | | | | |
|------|--------|---------|--------------|-----------------------|-------------------|------|--------|----------|---------------------|--------|
| Main | > Proj | ects | | | | | | | | |
| | | | | | | | | | | |
| | Dele | ete Add | project | | | | | | | |
| | | | projece | | | | | | | |
| Ľ | DCI | | project | | | | | | * | Search |
| | | Project | Project name | Deadline for Customer | Internal deadline | Туре | Status | Customer | Ⅲ → Manag | |

3. The system will open a general window of project management. Mark all needed tasks to be included in the invoice. If the user wants to issue the invoice for the whole project, then it simply needs to include all tasks in the invoice. To include a task in the invoice, go through the following steps:

3.1. Click "Tasks" sheet.



3.2. Click check box icon \sim to open task data.

| | a projec | | | | | |
|---------|---------------|------------------------|-----------------------|----------|--|------------|
| Project | Tasks 1 | Purchase orders (PO) 2 | Acts of Acceptances 1 | Invoices | | |
| N | lotary approv | /al | | | | , v |
| | | | | | | Add t |

3.3. Check box "Include task in invoice and act".

Include task in invoice and act 🛛 🗸

3.4. Click "Save". The system will reload a project data window.

| Include task in invoice and act | ✓ | | | | | |
|---------------------------------|---|--|------|-----------------|---------------|----------|
| Completed | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | Add task |
| | | | Save | Issue agreement | lssue invoice | Delete |

After the user has marked all tasks, that he wants to include in the invoice, click "Issue invoice" in the general project management window.

! Please note that "Issue invoice" option is available in all project management sheets (Project, Task, Acts of Acceptances, Invoices).

| | | Project Project review | | | | |
|---------|---|---------------------------|--------------------------|-----------------------|------------|---|
| Project | | Tasks 🚺 | Purchase orders (PO) (2) | Acts of Acceptances 1 | Invoices 0 | |
| | | | | | | |
| | # | Issu | ance date | Payment d | eadline | In total |
| | | | | | | |
| | | | | | | |
| | | | | | | Save Issue agreement Issue invoice Delete |

5. The system will supply the manager with pre-invoice window. Review all data in pre-invoice window and make corrections, if needed. See below the description of pre-invoice window fields.

| Field | Description |
|-----------------------|---|
| Name | Invoice name |
| Number | Unique invoice number – this parameter is adjusted to the translation agency's internal standards |
| Invoice date | The system automatically supplies the user with actual date, however, the user is able to change this date |
| Order deadline | Deadline for project submission to the Customer |
| Payment due date | The system automatically counts payment due date based on the formula: Invoice date plus credit days for the Customer |
| Contact person | Contact person of the Customer |
| Payor | Customer's name, surname (Individual) or Company name (Legal entity) |
| Personal code | Individual's personal code |
| Registration No. | Legal entity's registration number |
| Address | Individual's address |
| Legal address | Company's legal address |
| Actual address | Company's actual address |
| Job name | Job name coincides with the task name. If the user wants to change the job name, it can be done in details window of the particular task. |
| No discount available | The system will say "Yes", if a particular task does not receive discount. |
| | System will say "No", if a particular task receives discount. |
| Unit | Unit of measurement |
| Amount | Unit amount |
| Price | Price per 1 unit |
| Total, currency | Total price of every task |
| Total | Total price of all tasks |
| Discount applicable | Total amount, from which discount will be calculated |
| Discount | Discount amount. The user is able to set the discount either in percentage or in amount. |

| | "(Customer discount)" – this hint reveals gener discount amount for the particular Customer. Number in field right to "Discount" box revea predefined discount for this project (the user defines in project details): | | | | | | | |
|---------------------|--|--|--|--|--|--|--|--|
| | (Customer discount: 4%) Discount % 🔻 2.00 | | | | | | | |
| Total with discount | Total amount with discount | | | | | | | |
| VAT | VAT rate – choose from available rates. Additional rates are set up upon request to OCLanguage support team | | | | | | | |
| Total | Total amount for payment | | | | | | | |
| Invoice signed by | Choose a representative of translation agency, who will be signing the invoice. | | | | | | | |
| | ! Please note that the system will include translation agency manager in this list only if it has the authority of signing invoices (user rights can be edited in "Users" section). | | | | | | | |

7. To finish the creation of invoice click "Save new invoice".

| Invoice signed by | Isachev Andrey Eduardovitsch (CEO) | | - |
|-------------------|------------------------------------|------|--------|
| | | | |
| | | Save | Cancel |
| | _ | | |

8. The system will lead the user to general project management window. If the invoice was saved, the system would reveal the text message "Added successfully!".



To view the invoice, take either of following 2 steps:

1. In particular project click "Invoices".



2. Open "Invoices" database (in the main menu click "Documents" -> "Invoices").



7.8. How to send invoice to Customer 7.8.1. Send from project management window

In order to send an invoice from the project management window take the following steps:

1. Open "Projects" database.



2. Click a particular project.

| Proje | cts | | | | | | | | |
|---------------|---------|---------------|-----------------------|-------------------|---------|-------------------|------------|--------------|------------|
| Main > Projec | cts | | | | | | | | |
| Delet | te Add | l project | | | | | | | |
| | | | | | | | | III • | Search |
| | Project | Project name | Deadline for Customer | Internal deadline | Туре | Status | Customer | Mana | ger |
| | 90-001 | Alpha project | 26.07.2017 | | Written | Awaiting confirma | Smith John | Karlis | |
| 3. | Click | "Invoices" | ' tab. | | | | | | |
| Al | pha | a proj | ect | | | | | | |
| Main | > Proje | cts > Project | review | | | | | | |
| Proj | ect | Tasks | Purchase | orders (PO) | 4 | Acts of Accept | ances 4 | | Invoices 3 |
| | | | | | | | | | |

4. Click (v) to send a particular invoice to the Customer's specified address for receiving invoices.



In order to send an invoice from "Invoice" database view, take the following steps:

1. Browse "Documents -> Invoices".



2. Click () to send an invoice to the particular Customer's e-mail address.

| Invoices | | | | | | | | | | | |
|-----------------|--|--------|--------------|----------|--------|---------|-------|---------|---------|--|--|
| Main > Invoices | | | | | | | | | | | |
| Delete Export | | | | | | | | | | | |
| III → Search | | | | | | | | | | | |
| | | Export | | | | | | | | Search | |
| | | | Payment date | Deadline | Client | Manager | Price | Comment | | Search Actions Send invoice over e-r | |

7.9. How to issue Act of acceptance document

OCLanguage represents a tool for autonomic creation of Act of Acceptance document.

7.9.1. How to create an act

! Please note that acts are created per project tasks. Which means, that every task, that the user has selected to have Act of acceptance, will have one act.

To generate a new act take the following steps:

1. Browse "Projects" database.



2. Browse a specific project.

| Proj | ects | | | | | | | |
|-----------|-------------------|-------------------------|-------------------------------------|-------------------|------------------------|---------------------------------|------------------------|--------------|
| Main → Pr | rojects | | | | | | | |
| | | | | | | | | |
| D | elete Add | project | | | | | | |
| | | | | | | | | III - Search |
| | | | | | | | | Search |
| | Project | Project name | Deadline for Customer | Internal deadline | Туре | Status | Customer | Manager |
| | Project 90-002 | Project name Proj_12 | Deadline for Customer 04.07.2017 | Internal deadline | Type Written | Status Awaiting confirmation | Customer Smith John | |
| | | | | Internal deadline | | | | Manager |

3. Browse "Tasks" section.

| Proj_11 Main > Projects > Project review | | | | | |
|---|-----------------------|-------------|--|--|----------|
| Project Tasks 1 | Acts of Acceptances 1 | Invoices 0 | | | |
| Translation | | | | | ~ × |
| | Task name | Translation | | | |
| | Date | 20.06.2017 | | | m |
| | Time | 10:00:00 | | | |

4. To include a particular task in the act, in task details check the box "Include task in invoice and act" and click "Save".

| Work evaluation | (+0) - Satisfactory | • |
|---------------------------------|---------------------|---------------------|
| Include task in invoice and act | | |
| Completed | | |
| | | |
| | | |
| | | Add task |
| | Save | ssue invoice Delete |

5. Click "Acts of Acceptances" to open the acts database.

| Proj_ Main > Proje | 11 etts > Project review | v | | |
|-----------------------|-----------------------------|-----------------------|-------------|----------|
| Project | Tasks 1 | Acts of Acceptances 1 | Invoices 0 | |
| | | | | |
| | | Status | In progress | • |
| | | Project name | Proj_11 | |
| | | Туре | Oral | v |
| | | Deadline | 02.07,2017 | m |

6. Click "Generate Act of Acceptance".

| 11 | | | | | | | | | |
|--------------------|-----------------------|--------------------|------------------------------------|------------------------------------|---|------------------------------------|---|--|---|
| 1 | | | | | | | | | |
| s > Project review | | | | | | | | | |
| Tasks 🚺 | Acts of Acceptances 0 | Invoices 🚺 | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| 1 | issuance date | | La | inguages | | In total | | | |
| | | | | | | | - | | |
| | | | | | | | Gene | erate Act of Accept | ance |
| | | | | | | | | | |
| | | | | | | | Save | Issue invoice | Delete |
| | Tasks 1 | s > Project review | Tasks Acts of Acceptances Invoices | Tasks Acts of Acceptances Invoices | Tasks Acts of Acceptances Invoices Invoices | Tasks Acts of Acceptances Invoices | Tasks Acts of Acceptances Invoices Invoices | Tasks Tasks Tasks Tasks Tasks Languages In total | Tasks Acts of Acceptances Issuance date Languages In total Cenerate Act of Accepta |

 OCLanguage will generate a new act and reveal it in general table. In addition, the user can browse all acts in Acts database (in main menu "Documents" -> "Acts"), described in documentation section "5.3. Acts of Acceptance".

| roj_11 □ > Projects > Project revi | iew | | | | |
|---------------------------------------|-----------------------|------------|-----------|-----------|--------------------------|
| oject Tasks 1 | Acts of Acceptances 1 | Invoices 🚺 | | | |
| # | lssuance date | | Languages | In total | |
| 12D | 17.06.2017 | | ITA->ENG | 92.00 USD | b |
| | | | | | Generate Act of Acceptar |

7.9.2. How to browse project acts

To view the Acts in the main menu click "Documents" -> "Acts".



User can browse all Acts related to a particular project going through the following steps:

1. Browse "Projects" database.



2. Browse a specific project.

| Proj€ ain → Proj | ects | | | | | | | |
|---------------------|--------------------|-------------------------|--------------------------|-------------------|-----------------|-----------------------|-----------------------|--|
| Del | ete Add Project | project Project name | Deadline for Customer | Internal deadline | Туре | Status | Customer | HI - Search Manager |
| | | | | | | | | |
| | 90-002 | Proj_12 | 04.07.2017 | | Written | Awaiting confirmation | Smith John | Karlis |
| | 90-002 65-001 | Proj_12 Proj_11 | 04.07.2017 02.07.2017 | | Written Oral | Awaiting confirmation | Smith John SIA OCL | Karlis Isachev Andrey Eduardovitsch |

3. Browse "Acts" section.

| Proj_ | 11 cts > Project review | , | | |
|---------|----------------------------|-----------------------|-------------|---|
| Project | Tasks 1 | Acts of Acceptances 1 | Invoices 0 | |
| | | , and g | | |
| | | Status | In progress | • |
| | | Project name | Proj_11 | |
| | | Туре | Oral | Ŧ |
| | | Deadline | 02.07.2017 | Ê |

4. The system reveals all acts related to specific project, showing data described in table below.

| Data | Description |
|--|---|
| Act # | Unique Act # |
| Issuance date | Act issuance date |
| Languages | All language pairs in the act |
| In total | Total amount to be paid by the Customer |
| | Click to open the act in a new window (.pdf |
| | format) |
| 1 I I I I I I I I I I I I I I I I I I I | Click to delete the act |

Project acts table is revealed in the image below.

| Proj_ | _11 | | | | | |
|-------------|-----------------------|-----------------------|------------|-----------|-----------|----------------------------|
| Main → Proj | ects > Project review | | | | | |
| Project | Tasks 1 | Acts of Acceptances 1 | Invoices 🚺 | | | |
| | | | | | | |
| # | ŧ | Issuance date | | Languages | In total | |
| 1 | 12D | 17.06.2017 | | ITA->ENG | 92.00 USD | b |
| | | | | | | Generate Act of Acceptance |

Acts database and its related features are described in documentation section "5.3. Acts of Acceptance".

In issued act the system will add only 1 line, with description, amount and price information as per the actual task.



www.kiev-bridge.com.ua +38 (044) 587-92-16 +38 (044) 287-11-63

01033, Ukraine, Kiev, Saksaganskogo Street 39-B, office 3

Act of Acceptance #28C Of supplied services (performed tasks) at 06.05.2015

Private enterprise «Translation agency Bridge» on behalf of Director, Maxim Lobachevskiy, (hereinafter "Contractor") from one side and SIA OCL (hereinafter referred to as "Customer"), represented by _______, from other side, agree on this Act, that Contractor supplied Customer with following services (tasks performed):

| # | Service name | Unit | Quantity | Price | Total |
|---|------------------------|------|----------|--------------|----------|
| 1 | Перевод 1-го документа | Page | 73 | 699.00 | 51000.00 |
| | | | | Total: | 51000.00 |
| | | | | Without VAT: | - |
| | | | | In total: | 51000.00 |

Total quantity of services 1, for total price: 51000.00 RUR without VAT

By signing this Act, both parties confirm that they have fully met their obligations and do not have any claims to each other (including property, financial or other). The act is made in two copies, one for each party.

| CONTRACTOR: | CUSTOMER: |
|---|-----------|
| Private enterprise "Translation agency Bridge" | SIA OCL |
| Chamber of Commerce A01 #372328 at 15.02.2011. | |
| Company Registration # 37481035, | |
| Bank account: 26001901349162 (OTP Bank), Kiev, MFI 300528 | |
| Address: Kiev, 01033, Saksaganskogo Street 39-B, office 5 | |
| Lobachevskiy M. | Stamp |

7.10. How to send Act to Customer 7.10.1. Send from project management window

In order to send an act from the project management window take the following steps:

1. Open "Projects" database.



2. Click a particular project.

| Pro Main > P | jects rojects | | | | | | | | |
|-----------------|------------------|----------------|-----------------------|-------------------|-------|-----------------------------|------------------------|---------|-----------|
| D | elete A | dd project | | | | | | | |
| | Droiod | Droject name | Deadline for Customer | Internal deadline | Turne | Chaburg | Customer | | Search |
| | 90-001 | Alpha project | Deadline for Customer | Internal deadline | Type | Status Awaiting confirma | Customer Smith John | Manager | |
| 3 | . Clio | k "Acts" tal | b. | | | | | | |
| A | lph | a pro | ject | | | | | | |
| Ma | in > Pro | jects ⇒ Projec | t review | | | | | | |
| Pr | oject | Tasks | 3 Purchase | orders (PO) | 4 | Acts of Accep | otances 4 |) | nvoices 3 |

4. Click () to send a particular act to the Customer's specified address for receiving acts.

7.10.2. Send from "Acts" database view

In order to send Act of Acceptance from the "Acts" database view, take the following steps:

1. Browse "Documents -> Acts".



2. Click () to send an act to the particular Customer's e-mail address.

| A | cts | | | | | | | | | |
|------|--------|-------|------------|---------------|-----------------|------------|----------|------|----------|---|
| Main | > Acts | | | | | | | | | |
| | Del | ete E | ixport | | | | | | | Search |
| | | # | Issue date | Language pair | Project | Total | Customer | Sent | Received | Ask Customer to sign the Act over e-mail |
| | | 1D | 21.06.2017 | HUN->ENG | % 95-007 | 120.00 EUR | МТИ | | | |

7.11. Discount management

Discount for the Customer project is managed in 4 levels:

- 1. In Customer's data
- 2. In project data
- 3. In project tasks data
- 4. During invoice preparation stage.

Description below reveals logical sense behind all four mechanisms.

! Please note that the project discount supersedes the Customer discount. Which means, if the Customer's discount is 1%, but project discount accounts for 2%, in preliminary invoice window by default the system will put 2%.

1. In Customer card the translation agency manager can set up discount level for all projects that will be placed. The discount can be specified only in percentage. Once the discount is saved, the system user always will be told, what is the default discount level for the particular Customer. The user can see this information in the following sections:

a) in Customer's data

| Discounts | | | |
|-----------|--|--|--|
| 4 | | | |

b) in project data



c) in task data the user can disable discount for particular task by checking the box "No discount available for this item"



d) in preliminary invoice window under "Notes" the manager sees the Customer discount and next to "Discount %" he sees the particular project discount.

If there is a certain amount of tasks (calculated total value in \$), that are going to be discounted, then the system will reveal it in "Discount applicable".

| | Discount applicable | 0.00 |
|------------|---------------------|------|
| (Notes: 4) | Discount % T 2.00 | 0.00 |

In this case in the preliminary invoice window in line "No discount available" the system will reveal value "Yes".

| Job name | No discount available | | |
|-----------------|-----------------------|--|--|
| Notary approval | Yes | | |

As the last stage of discount management the user is able to change the discount in the preliminary invoice window. As written above the system informs the user about the Customer's discount, project discount and discount prohibitions, if any. If the invoice consists of at least 1 task, which is set up to be discounted, the system user is able to revise discount level by specifying it either in percentage or in value. After this parameter is set up, the system will reveal the total amount for payment in line "Total with discount".

| Job name | No discount available | Unit | Amount | Price | Total. USD |
|-----------------|-----------------------|------------------------|--------|--------|------------|
| Notary approval | Yes | | 0 | 0.0000 | 0.00 |
| (Notes: 4) | | Total | | | 0.00 |
| | | Discount applicable | | | 0.00 |
| | | Discount <u>%</u> 2.00 | | | 0.00 |
| | | Total with discount | | | 0.00 |
| | VAT 18% • | | | 0.00 | |
| | Total | | | 0.00 | |

7.12. How to save payment to vendor

Payment to vendor is saved manually in the Vendor payments database.

To learn more about the Vendor payments database itself, browse manual "4.3. Vendor payments report".

To see all historical payments to vendors database, browse manual "4.4. Payments to vendors history".

Take the following steps to save payment to vendor:

1. To access it, in main menu browse "Accounting -> Sales report".



2. By using a Search window sort the payments you want to execute. Each line in payments table represents one task for vendor. Which means that, if, for instance, the translation agency assigned 5 tasks to the vendor, the system will reveal exactly the same number (5 lines) of payments pending.
| Payments | | |
|-----------------|------|------------------------|
| Main > Payments | | |
| Date fro | om | |
| Date | e to | <u> </u> |
| Task ty | /pe | |
| Payment sta | tus | |
| Task sta | tus | |
| Perform | ner | Fast translations Ltd. |
| Contact d | ata | |
| | | |
| | | Search |

! Please note that if the system user saves full payment of task, it will remove this pending payment record from "Payments" table.

- 3. Check the box next to the payment line you want to execute money transfer.
- 4. Specify the amount and payment method.
- 5. Leave a comment, if needed.

| Ser | nd | | | | | | | | | | |
|-----|--------|-----------------------|------------------------|------------|-----------|-------|---------|--------|------------------|---------|-----------|
| | | | | | | | | | | | * |
| | Nº | Status | Performer | Price | Cost 👻 | Paid | Pending | Amount | Method | Comment | |
| | 95-007 | Awaiting confirmation | Fast translations Ltd. | 120.00 EUR | 25.44 RUR | 30.44 | -5.00 | 0.00 | ¥ | | 11 |
| | 65-002 | Awaiting confirmation | Fast translations Ltd. | 80.00 EUR | 15.00 USD | 0.00 | 15.00 | 15 | Bank account 🛛 🔻 | | 1 |

6. Click "Send" button above the payment table to close payment(s).

! Please note that the user is able to add several payments data and approve by clicking "Send" button for one time.

7.13. How to save incoming funds from Customer

Incoming funds from the Customer are saved manually in Transactions with Customers database.

To learn more about Incoming funds database itself, browse manual "4.5. Settlements with Customers".

Take the following steps to save incoming payment from Customer:

1. To access it in the main menu browse "Accounting -> Transactions with Customers".



2. By using a Search window sort the payments you want to execute. Each line in payments table represents one task for vendor. Which means that, if, for instance, the translation agency assigned 5 tasks to the vendor, the system will reveal exactly the same number (5 lines) of payments pending.

Transactions with Customers

| Main \rightarrow Transactions with Customers | |
|--|---------|
| Date from | |
| Date to | |
| Task type | ···· • |
| Payment status | · • |
| Task status | ···· |
| Customer | SIA OCL |
| | |
| | Search |

! Please note that, if the system user saves full payment of task, it will remove this pending payment record from "Payments" table.

- 3. Check the box next to the payment line you want to execute money transfer.
- 4. Specify the amount and payment method.
- 5. Leave a comment, if needed.

| Sen | d Export | | | | | | | | | | |
|-----|-----------------|--------------------------|----------|--------|---------------|-------|-------------------|-------|----------------|---------|--------------|
| | | | | | | | | | | | III • |
| | Order | Status | Customer | Amount | Price | Paid | Opened payment | Total | Method | Comment | |
| | % 65-001 | In progress | SIA OCL | 8.00 | 100.00 USD | 42.00 | 58.00 | 0.00 | | | 11 |
| | % 65-002 | Awaiting confirmation | SIA OCL | 6.00 | 80.00 EUR | 0.00 | 80.00 | 50 | Bank account 🔻 | | |
| | % 65-001 | In progress | SIA OCL | 0.00 | 0.00 USD | 0.00 | 0.00 | 0.00 | | | li |

6. Click "Send" button above the payment table to close payment(s). The system will update the table with new data, as the user can see on the image below.

| Se | nd Export | | | | | | | | | | |
|----|-----------------|-----------------------|----------|--------|---------------|-------|-------------------|-------|--------|---------|---------|
| | | | | | | | | | | | |
| | Order | Status | Customer | Amount | Price | Paid | Opened payment | Total | Method | Comment | |
| | % 65-001 | In progress | SIA OCL | 8.00 | 100.00 USD | 42.00 | 58.00 | 0.00 | | | 1 |
| | � 65-002 | Awaiting confirmation | SIA OCL | 6.00 | 80.00 EUR | 50.00 | 30.00 | 0.00 | | | 4 |
| | % 65-001 | In progress | SIA OCL | 0.00 | 0.00 USD | 0.00 | 0.00 | 0.00 | | | / |

! Please note that the user is able to add several payments data and approve by clicking "Send" button for one time.

7.14. How to issue PO document for vendor

OCLanguage allows user to generate PO documents automatically for all kind of tasks (Translation, Translator service (selection, literary editing, validation, layout, proofreading), DTP, Notary certification, Sworn translator, Other task).

To create a new Purchase order (PO) for vendor services, go through the following steps:

1. Open the project data in the main menu and click "Projects".



2. Click a particular project.

| Projects | | | | | | | | | | |
|-----------------|----------------|-----------------------|-------------------|---------|-------------------|------------|--------------|--------|--|--|
| Main > Projects | | | | | | | | | | |
| Delete | Add project | | | | | | III • | Search | | |
| 🔲 Proje | t Project name | Deadline for Customer | Internal deadline | Туре | Status | Customer | Mana | ger | | |
| 90-00 | Alpha project | 26.07.2017 | | Written | Awaiting confirma | Smith John | Karlis | | | |

3. Click tab "Tasks" to open the Task window.

| | a project | | | |
|---------|-----------|------------------------|-----------------------|------------|
| Project | Tasks 🚺 | Purchase orders (PO) 2 | Acts of Acceptances 1 | Invoices 0 |

4. Click "Add task".

| Ipha proj in > Projects > Project | | | |
|--------------------------------------|------------------------|-----------------------|------------|
| oject Tasks | Purchase orders (PO) 2 | Acts of Acceptances 1 | Invoices 0 |
| New task | | | |

5. Fill in the task data. To issue PO for this task, check the box "Include task in PO". Click "Save".

| Include task in PO | | | | |
|---|------|--------------------|------------------|----------|
| Completed | | | | |
| | | | | |
| | | | | |
| | | | | dd task |
| | Save | Issue agreement | Issue invoice | Delete |
| In "Tasks" sheet you can view all data about the actual tasks. | | | | |
| Alpha project | | | | |
| Main > Projects > Project review | | | | |
| Project Tasks 2 Purchase orders (PO) 1 Acts of Acceptances 1 Invoices 1 | | | | |
| Notary approval | | | ~ | × |
| Translation task | | | ~ | × |
| | | | | |
| | | | | Add task |
| | | Save Issue agreeme | nt Issue invoice | Delete |
| To create PO, click sheet "Purchase orders (PO)". | | | | |



Click "Issue PO".

| | ha proj Projects > Project | | | | | | |
|---------|-------------------------------|----------------------|-----------------------|------------|--------|---------|----------|
| Project | Tasks | Purchase orders (PO) | Acts of Acceptances 1 | Invoices 1 | | | |
| | | | | | | | |
| | # Is | uance date | Task name | Languages | Vendor | Manager | |
| | | | | | | | |
| | | | | | | | Issue PO |
| | | | | | | | Issue PO |

The system interface will be automatically reloaded and you will see a new PO generated.

| | project | | | | | | | | | | | |
|------|------------|-----------------|---------------|-------------------|-------|------------|------------------------|------|-----------------|---------------|----------|--|
| ject | Tasks 2 | Purchase orders | (PO) 1 | Acts of Acceptanc | es 🚺 | Invoices 1 | | | | | | |
| | | | | | | | | | | | | |
| # | Issuanc | e date | Task nam | e | Langu | ages | Vendor | | Manager | | | |
| 149 | 9 19.07.20 |)17 | Translatio | ranslation task | | HUN | Fast translations Ltd. | | Karlis | | Û | |
| | | | | | | | | | | lss | Issue PO | |
| | | | | | | | | _ | | | | |
| | | | | | | | | Save | Issue agreement | Issue invoice | De | |

Click to open PO in .pdf format (Internet browser will open a new tab).

Click $\widehat{
m I\!I}$ to delete PO (the system will permanently delete the PO document).

! Please note that POs for particular project can be seen in project data (under "Purchase orders (PO) sheet) or in Purchase Orders database (accessible in main menu "Documents" -> "Purchase orders (PO)). More information about PO database is provided in user manual "5.2. Purchase orders (PO)".

Below you can see that the vendor has received Purchase Order for this task.

| инф | рормация о задании 📄 🛛 Indox 🗴 | ÷ 2 |
|-----|--|-------------------------|
| + | sales@oclanguage.com 9:14 AM to me 👻 | (0 minutes ago) 🔀 🔺 👻 |
| ŁA | Russian ▼ | Turn off for: Russian × |
| | Задание | |
| | LLC "OCL", 40002154241 Rīga, Brīvības 81 | |
| | Исполнитель: Gatis Bambals Дата заказа: 05.04.15 10:14 Номер заказа: № 65-003-01 С языка: ENG На язык: UKR Ссылка на переводимый файл: <u>http://demo.oclanguage.com/file.php?key=1edcad1b48c723d7b670580579fk</u> Срок сдачи: 28.02.2015 11:00:00 Отправить на адрес: <u>admin@admin.ua</u> Заказ отправил (a): Admin Admin Заказ получил: Gatis Bambals | <u>35c2d</u> |

Click here to Reply or Forward

7.15. How to send PO to vendor 7.15.1. Send from project management window

The system allows the user to issue Purchase Order (PO) document and send it to the vendor automatically. Take following steps to process the PO document:

1. Under the main menu click "Projects".



2. Click the project you want to issue PO for.

| PI | roje | ects | | | | | | | |
|------|--------|--------------------------|-------------------------|-----------------------|-------------------|---------------------|-----------------------------|------------------------|---|
| Main | > Proj | ects | | | | | | | |
| | | | | | | | | | |
| | Dele | ete Add | project | | | | | | |
| | | | | | | | | | Ⅲ ▼ Search |
| | | | | | | | | | |
| | | Project | Project name | Deadline for Customer | Internal deadline | Туре | Status | Customer | Manager |
| | | Project 90-003 | Project name Plan_01 | Deadline for Customer | Internal deadline | Type Oral | Status Awaiting confirma | Customer Smith John | Manager Isachev Andrey Eduardovitsch |
| | | - | - | | Internal deadline | | | | - |

3. Click tab "Tasks" to open the Task window.



4. To issue PO for this task check the box "Include task in PO". Click "Save".

| Include task in PO | ~ | | | | | | | | | | | | | | |
|--------------------|----------|--|--|--|--|--|--|------|---------|--------|-----|-------|--------|----|---------|
| Completed | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | Ad | dd task |
| | | | | | | | | Save | lssue a | greeme | ent | Issue | invoic | 2 | Delete |

5. In "Tasks" sheet you can view all data about the actual tasks and see, whether particular task is included in PO.

| Alpha pro | ject | | | | | |
|--------------------------|------------------------|-----------------------|------------|-------------------|-----------------|----------------------|
| Main > Projects > Projec | treview | | | | | |
| Project Tasks | 2 Purchase orders (PO) | Acts of Acceptances 1 | Invoices 1 | | | |
| | | | | | | |
| Notary ap | proval | | | | | ~ × |
| Translatio | n task | | | | | ~ × |
| | | | | | | Add task |
| | | | | Save | Issue agreement | Issue invoice Delete |
| 6. To ci | eate PO click shee | t "Purchase order | s (PO)". | | | |
| Project | Tasks 2 🖡 | Purchase orders (P | 0) 🚺 | Acts of Acceptanc | tes 🚺 | Invoices 1 |
| 7. Click | "Issue PO". | | | | | |
| Alpha pro | | | | | | |
| Project Tasks | 2 Purchase orders (PO) | Acts of Acceptances 1 | Invoices 1 | | | |
| | | | | | | |
| # Is | suance date | Task name | Languages | Vendor | Manager | r |
| | | | | | | Issue PO |
| | | | | Save | lssue agreement | Issue invoice Delete |

8. The system interface will be automatically reloaded and you will see a new PO generated.

| | | Oject oject review | | | | | | |
|---------|------|-----------------------|----------------|----------------------|------------|-----------------------|----------------------|--------------------|
| Project | Task | Purchase orde | ers (PO) | cts of Acceptances 1 | Invoices 1 | | | |
| | | | | | | | | |
| | # | Issuance date | Task name | Langua | iges Ve | endor | Manager | |
| | 149 | 19.07.2017 | Translation ta | ask ENG->H | IUN Fa | ast translations Ltd. | Karlis | 1 |
| | | | | | | | | Issue PO |
| | | | | | | | | |
| | | | | | | | Save Issue agreement | Issue invoice Dele |

9. Click () to send PO to the vendor.

! Please note that the system will send PO to the vendor's e-mail address each time, when the user checks the box "Send Purchase Order (PO) to vendor", click "Save" in task data and clicks "Issue PO" under "Purchase orders (PO) tab. By default, when the task view window is opened the box "Send Purchase Order (PO) to vendor" is unchecked and no POs are sent by the system.

7.15.2. Send from "Purchase orders (PO)" database view

In order to send a Purchase order from "Purchase orders (PO)" database view, take the following steps:

1. Browse "Documents -> Purchase orders (PO)".



2. Click () to send an act to the particular vendor's e-mail address.

7.16. How to add a new oral translation project

To create a new oral translation project do the following steps:

1. Under the main menu click "Projects".



Choose the translation project type "Oral" and fill in the project data.

| Projects | |
|-------------------------------|-------------------------|
| Main > Projects > New project | |
| | |
| Status | Awaiting confirmation - |
| Project name | |
| Туре | Oral |
| | Written |
| Deadline | Oral |

All fields from the project registration window are revealed in the table below.

| Field | Description |
|--------|---|
| Status | Project can be in one of below stated statuses: |
| | Awaiting confirmation |

| | · · · · · · · · · · · · · · · · · · · |
|--|---|
| | In progress |
| | Issued invoice |
| | • Paid |
| | Cancelled |
| | Delivered |
| | Evaluating |
| | Finished |
| | Achieved. |
| | ! All project statuses are set up manually. None of |
| | them are changes automatically. Which means |
| | user should maintain correct project status by |
| | himself. |
| Project name | Project name |
| Туре | Oral/written translation project |
| Deadline | General deadline of project submission to the |
| | Customer |
| Customer's confirmation | Check the box, if the Customer has confirmed the |
| | translation |
| Translation performed in accordance with | Check the box to approve the statement above. |
| requests | Relevant, if the Customer sets up specific |
| | requirements that have to be met |
| Customer | Specify the Customer name |
| Manager | Specify the manager name |
| Translation type | Specify the oral translation type: |
| | Simultaneous |
| | Consecutive |
| | Whisper. |
| Country | Specify the country where the translation project |
| | will take place |
| Address | Specify the address, where the translation project |
| | will take place |
| Date and time | Specify date and time information of the oral |
| | translation |
| Translation equipment | Specify the project data, that is related to its |
| | execution: |
| | Materials (upload documents relevant to |
| | oral translation project) |
| | Vendor (vendor name, who is supposed |
| | to handle the translation) |
| | Sum (total budget of project). |
| Budget | Project budget |
| Advance neument | |
| Advance payment | Amount of advance payment required from the |
| | Customer |
| Discount | Customer Specify discount for particular project |
| | Customer |

| | Cash Receipt Invoice Free of charge. |
|------------------------|---|
| Transport expenses | Amount of transport expenses incurred |
| Accommodation expenses | Amount of accommodation expenses incurred |
| Comments | Additional comments related to the translation project |

3. Click "Save" to finish the creation of a new oral translation project.



Once the user has saved the project, the system automatically opens the general management window with options of adding new tasks, creating invoices and agreements.

| ≡ 🖉 🔺 | | 🗮 English language Karlis 💽 |
|---|-------------|-----------------------------|
| | | |
| Proj_11 Main > Projects > Project review | | |
| Project Tasks ① Acts of Acceptances ① | Invoices 🕕 | |
| | | |
| Status | In progress | - |
| Project name | Proj_11 | |
| Туре | Oral | ~ |
| Deadline | 02.07.2017 | # |

7.17. How to add new task to oral translation project

Take the following steps in order to add a task to the oral translation project:

1. Under the main menu click "Projects".



2. Click a particular project.

| Proj€ tain⊃ Proj | ects | | | | | | | | |
|---------------------|---------------|---------------|-----------------------|-------------------|---------|-----------------------|------------|---------|-------------------|
| Del | ete Add proje | ect | | | | | | | |
| | Project | Project name | Deadline for Customer | Internal deadline | Туре | Status | Customer | | Search Manager |
| | 90-001 | Alpha project | 01.06.2017 | | Written | Awaiting confirmation | Smith John | | Karlis |
| | 65-001 | Proj_11 | 01.06.2017 | | Oral | In progress | SIA OCL | | Karlis |

3. The system will open the general project management window. Click "Tasks".

| Proj_11 Main > Projects > Project review | | |
|---|-------------|---|
| Project Tasks ① Acts of Acceptances ① | Invoices 0 | |
| | | |
| Status | In progress | • |
| Project name | Proj_11 | |
| Туре | Oral | Ŧ |
| Deadline | 02.07.2017 | Ê |

4. Click "Add task"

| Proj_11 Main > Projects > Project review | N | |
|---|-----------------------|------------|
| Project Tasks () | Acts of Acceptances 0 | Invoices 🔘 |
| | | |
| | | |

Oral translation project task has the following data that the user either is obliged or is able to save.

| Field | Description | | |
|------------------|--|--|--|
| Task name | Give a name for this particular task | | |
| | Important to notice – task name will be visible in the Customer related documents (Act and Invoice). | | |
| Date | Specify date information related to oral translation project | | |
| Time | Specify time information related to oral translation project | | |
| From language | Language, from which the translation will be done | | |
| Into language | Language into which the translation will be done | | |
| Vendor | Choose any vendor available from the list (the system reveals all vendors that are available and are providing translation of the specific language pair) | | |
| Urgency | Specify, if the task is urgent or not (choose between 2 options: regular or urgent). | | |
| Translation type | Choose either of supplied options describing the translation specifics: | | |
| | Technical Legal Economics Medicine Customs Science Personal Other. | | |

| | Please keep the data updated to allow the system to collect statistics about translation field (Statistics section). |
|---------------------------------|---|
| Hours | Specify the duration of translation in hours. |
| Budget of task for Customer | Specify the task amount that will be revealed in the invoice for Customer. If the Customer belongs to some predefined pricelist of this service, the system will automatically calculate the payment amount to the Customer (by using simple formula of multiplying hour quantity with price/hour). |
| | User can choose from available pricelists. After the pricelist is chosen the user can either accept calculated price or revise it. |
| Payment to vendor | Specify the payment amount to the vendor. |
| Confirmation | Check the box, if the Customer has confirmed the pricing offer |
| Full amount paid to vendor | Check the box, if full amount of task budget was paid to the vendor |
| Information for vendor | Provide specific information related to translation task. |
| Work evaluation | |
| Include task in invoice and act | Check the box, if you want to include this task in invoice and act. Once these changes are saved, the system will automatically include it into the invoice and act. Every task equals to a line in the invoice or act. |
| Completed | Check the box, if the task is completed (submitted to the Customer). |

6. Click "Save".

| Work evaluation | (+0) - Satisfactory | | • |
|---------------------------------|---------------------|---------------|----------|
| Include task in invoice and act | | | |
| Completed | | | |
| | | | |
| | | | |
| | | | Add task |
| | Save | Issue invoice | Delete |

Invoices, Acts and Agreements for oral project are created according to same procedures as with managing written translation project.

7.18. Project table

In order to browse project data click "Projects" on OCLanguage management panel.



In project table the user can filter the data by using Search option – type in letters or digits to filter projects.

| = 🖬 🔺 | | | | | English language Karlis 혽 |
|-----------------------------|-----------------------|-------------------|------|-------------|---------------------------|
| Projects Main > Projects | | | | | |
| Delete Add project | Deadline for Customer | Internal deadline | Туре | Status | iii - sia ocl |
| 65-001 Proj_11 | 01.06.2017 | | Oral | In progress | SIA OCL Karlis |

Project table is very flexible in terms of tailoring the selected data according to the translation agency needs. Any column can be removed or edited up to translation agency request to developers of OCLanguage.

Project table consists of the following columns.

| Column name | Description |
|-----------------------|---|
| Project | Project number |
| Project name | Project name |
| Deadline for Customer | General deadline of the project (for the Customer) |
| Internal deadline | Project deadline (for the translation agency) |
| Туре | Translation project type – written/oral |
| Status | Project status (maintained in general project data) |
| Customer | Customer name |
| Manager | Project responsible manager name |

In order to improve the usability of the project management table, the user can use easily add or remove columns that it needs for working with project management table. The system will memorize users choice and supply the user with selected project table outlook every time, when the user logs in into the system.

| | i 🌲 | | | | | | English language Karlis 혽 |
|---------------------|--------------------|-------------------------|-----------------------|-------------------|---------|-----------------------|---|
| Proj€ Main⇒ Proj | ects | | | | | | |
| Del | ete Add Project | project Project name | Deadline for Customer | Internal deadline | Туре | Status | iii ▼ sia ocl |
| | 65-001 | Proj_11 | 01.06.2017 | | Oral | In progress | Project name Deadline for Customer |
| | 90-001 | Alpha project | 01.06.2017 | | Written | Awaiting confirmation | Internal deadline Type |
| | 95-007 | VRB | 03.02.2017 | | Oral | Awaiting confirmation | 🗹 Status |
| | 95-002 | | 27.01.2017 | | Oral | Awaiting confirmation | Customer Manager |

8. Vendor management

8.1. How to add translator

In order to add a new translator proceed with taking the following steps:

1. In the main menu click "Translators".



2. Click "Add translator".



2. Fill in the details in the fields.

| Field | Description |
|------------------|---|
| Туре | Choose either of options: Individual or Legal |
| | entity |
| Name | Person's name |
| Surname | Person's surname |
| Registration No. | Company' registration number (relevant to legal |
| | entities only) |
| VAT | Company' VAT number (relevant to legal entities |
| | only) |
| Gender | Person's gender |
| Birthday | Person's birthday |
| Country | Specify translator's country of residence |
| City | Specify translator's city of residence |

| Native language | Translator's native language |
|---|--|
| Second native language | Translator's second native language |
| Contact details | Specify translator's contact details. Add several |
| | lines, if needed |
| Available | Check the box, if this translator is available for |
| | handling translation projects. |
| | ! Please maintain actual availability information, |
| | because for handling translation tasks the system |
| | will bring up only available translators. |
| Sworn translator | Check the box, if this translator works in your |
| | translation agency |
| Internet access | Check the box, if this translator has permanent |
| | access to the Internet |
| Fast translations | Check the box, if this translator is able to provide |
| | fast translations |
| Available for over-the-phone interpreting | Check the box, if this translator is able to address |
| | over-the-phone interpreting |
| Consecutive interpreting | Check the box, if this translator is able to address |
| | consecutive interpreting |
| Simultaneous interpreting | Check the box, if this translator is able to address |
| | simultaneous interpreting |
| Performs editing | Check the box, if this translator is able to perform |
| | proofreading |
| Page standard | Specify both standard, according to which vendor |
| | works with. |
| | Words on page |
| | Symbols on page. |
| | For instance, if vendor's rate of translation from |
| | English into Russian is 10 \$ and the Customer has |
| | ordered 7,200 symbols with spaces, then the |
| | system automatically will suggest honorarium |
| | amount 40\$/task. |
| Self employed | Check the box, if this translator is a freelancer |
| Languages | Specify which language pairs the translator is able |
| | to do translation with. |
| | Click "Add" to create a new record of translation |
| | type (oral/written) and language pair. |
| | Click "Prices" to add price for translation and |
| | translator services. |
| Other service | Specify other services, that the translator is |
| | capable with providing by filling following fields: |
| | Language |
| | Type of service (Selection/Literary |
| | editing/Validation/Layout/Proofreading) |

| Knowledge evaluation | Measurement (Unit/Word/Page (1,800 ch. with spaces)/Page (250 words)/Page (A4)/Hour) Price and Currency. Evaluate knowledge level (put mark). ! Please note that every translation agency sets its own evaluation standard (for example, mark |
|------------------------|--|
| Pages per day | from 1 to 10 or A to F). Specify the maximum pages per day that the translator can perform |
| Experience (years) | Specify translator's experience in years |
| Fields of expertise | Check fields of expertise, that the translator is familiar with. |
| Programs | Check the programs that the translator is working with. ! Please note that the content of programs list is maintained by the translation agency (via Board - > Programs) |
| Translator's documents | Upload translator's documents (resume, translation examples, diplomas etc.) |
| Terms of payment | Quantity of credit days |
| Requisites | Save translator requisites data ! Please note that the content of requisites options is maintained by the translation agency (via Board -> Payment methods) |
| Priority branch | Priority branch that the translators prefers to work with |
| Comments | Additional information about the translator |
| | |

3. Click "Save". The system will save a new record in the translators' table.

| Comments | | |
|----------------------------------|------|--------|
| Experienced translator from Riga | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | /i |
| | | |

8.2. How to edit translator's data

In order to edit translator's data proceed with taking the following steps:

1. In the main menu click "Translators".



2. The system will open translators' section. Click the translator, whose data you want to review.

| ran | slato | rs | | | | | | | |
|----------|---------|--------------|--------------------------|---------|-----------|---|------------|------------|--------|
| n → Tran | slators | | | | | | | | |
| Dele | ete Ad | ld transl | lator Name, surname / | | | | Ⅲ ▼ | Search | |
| | Photo | Туре | Company name | Address | Available | Languages | | Evaluation | Rating |
| | ٢ | Leg. ent. | Fast translations Ltd. | | Yes | HUN->ENG, ENG->HUN, HUN->RUS, HUN->RUS, RUS->HU >HUN | JN, RUS- | 9.9 | 0 |
| | | Leg. | Karlis's company | | | | | | _ |

3. Edit translator's data.

! Please note - some of fields, that are not visible while translator's creation, become available in translator's table and translator's data review window.

| Field | Description |
|------------------|---|
| Туре | Choose either of options: Individual or Legal |
| | entity |
| Name | Person's name |
| Surname | Person's surname |
| Registration No. | Company' registration number (relevant to legal |
| | entities only) |
| VAT | Company' VAT number (relevant to legal entities |
| | only) |
| Gender | Person's gender |

| Birthday | Person's birthday | | | | |
|---|--|--|--|--|--|
| Country | Specify translator's country of residence | | | | |
| City | Specify translator's city of residence | | | | |
| | Translator's native language | | | | |
| Native language | | | | | |
| Second native language | Translator's second native language | | | | |
| Contact details | Specify translator's contact details. Add several lines, if needed | | | | |
| Available | Check the box, if this translator is available for | | | | |
| | handling translation projects. | | | | |
| | ! Please maintain actual availability information, | | | | |
| | because for handling translation tasks the system | | | | |
| | will bring up only available translators. | | | | |
| Sworn translator | Check the box, if this translator works in your | | | | |
| | translation agency | | | | |
| Internet access | Check the box, if this translator has permanent | | | | |
| | access to the Internet | | | | |
| Fast translations | Check the box, if this translator is able to provide | | | | |
| | fast translations | | | | |
| Available for over-the-phone interpreting | Check the box, if this translator is able to address | | | | |
| | over-the-phone interpreting | | | | |
| Consecutive interpreting | Check the box, if this translator is able to address | | | | |
| | consecutive interpreting | | | | |
| Simultaneous interpreting | Check the box, if this translator is able to address | | | | |
| | simultaneous interpreting | | | | |
| Performs editing | Check the box, if this translator is able to perform | | | | |
| 6 | proofreading | | | | |
| Self employed | Check the box, if this translator is a freelancer | | | | |
| Languages | Specify, which language pairs translator is able to | | | | |
| | do translation with. | | | | |
| | Click "Add" to create a new record of translation | | | | |
| | type (oral/written) and language pair. | | | | |
| | Click "Prices" to add price for translation and | | | | |
| | proofreading services. | | | | |
| Other service | Specify other services, that translator is capable | | | | |
| | with providing by filling following fields: | | | | |
| | Language | | | | |
| | Type of service (Selection/Literary | | | | |
| | editing/Validation/Layout/Proofreading) | | | | |
| | Measurement (Unit/Word/Page (1,800 | | | | |
| | ch. with spaces)/Page (250 words)/Page | | | | |
| | (A4)/Hour) | | | | |
| | Price and Currency. | | | | |
| Knowledge evaluation | Evaluate knowledge level (put mark). | | | | |
| | ! Please note, that every translation agency sets | | | | |
| | its own evaluation standard (for example, mark | | | | |
| | from 1 to 10 or A to F). | | | | |
| | | | | | |

| Pages per day | Specify the maximum pages per day that |
|------------------------|--|
| | translator can perform |
| Experience (years) | Specify translator's experience in years |
| Fields of expertise | Check fields of expertise that the translator is |
| | familiar with. |
| Programs | Check the programs that the translator is working |
| | with. |
| | ! Please note that the content of programs list is |
| | maintained by the translation agency (via Board - |
| | > Programs) |
| Translator's documents | Upload translator's documents (resume, |
| | translation examples, diplomas etc.) |
| Terms of payment | Quantity of credit days |
| Requisites | Save translator requisites data |
| | Please note that the content of requisites |
| | options is maintained by the translation agency |
| | (via Board -> Payment methods) |
| Priority branch | Priority branch that the translators prefers to |
| | work with |
| Comments | Additional information about the translator |

! Please, note that after a new translator is created, when the user opens translator's data review window, the system reveals statistics about the translator, described in the table below.

| Parameter | Description | | | |
|---------------|--|--|--|--|
| Active tasks | Quantity of tasks, that are being handled by the | | | |
| | translator now | | | |
| Written tasks | Quantity of written tasks done by the translator | | | |
| Oral tasks | Quantity of oral tasks done by the translator | | | |
| Rating | Rating of the translator among all vendors | | | |



4. Click "Save". The system will save a new changed translator's card.

| Comments | Slight update in resume |
|----------|-------------------------|
| | |
| | |
| | |
| | |

Save Delete

8.3. How to use autonomic payment rates for translator

OCLanguage automatically calculates payment amount to the vendor. In order to use this feature the user should do the following:

1. Make sure that in the translator's data the manager has saved regular and urgent translation/translator services prices. See the information of translator's data maintenance in document "8.1.2. How to edit translator's data".

| Page standard | Words on page | 250 | | | |
|---------------|------------------------|--|---|------------------------|----------------------|
| | Symbols on page | 1800 | | | |
| Languages | Туре | From language | | Into language | Language proficiency |
| | Oral | Spanish; Castilian | • | English | Highest level (C2) |
| | Price (Regular/Urgent) | 8.00 | | 14.00 | USD 👻 |
| Oral | | - English | • | Spanish; Castilian 🔻 | Highest level (C2) |
| | Price (Regular/Urgent) | | | 14.00 | USD 👻 |
| | Written | Spanish; Castilian | - | English 👻 | Highest level (C2) 🔹 |
| | Price (Regular/Urgent) | 3.50 | | 6.00 | USD 👻 |
| | Written | ▼ English | • | Spanish; Castilian 🔹 | Highest level (C2) |
| | Price (Regular/Urgent) | 3.00 | | 6.00 | USD 👻 |
| | Add | | | | |
| Other service | Language | Type of service | | Price (Regular/Urgent) | |
| | Spanish; Castilian | ▼ Validation | | ▼ 2.00 | USD 👻 |

2. Simply create a new task for the service, language pair and urgency level that the translator is able to handle. The system will automatically count the payment amount to the vendor. The total price is editable. See the information of how to create a new task in user manual "7.3. How to add task".

| | Vendor | Willshi | iere Naomi | | | | | | | - |
|--------------------------|--------------|-----------|-----------------|--------------|--------|---|-----|-------|---|----------|
| | Urgency | regula | r | | | | | | | • |
| Deadline for | r Customer | 02.08. | 2017 | | | | | | | ^ |
| Deadline | for vendor | 02.08. | 2017 | | | | | | | |
| | Amount | For Cust | omer | | | | cha | racte | • | |
| | | Use the a | amount in invoi | ces and acts | | | | | | |
| | | For vend | or | | | | cha | racte | • | |
| Budget of task for | r Customer | Price | | Select price | e list | • | | | | |
| | | Price | | 0 | | | | | | |
| | | Project b | udget | 980.00 USE | þ | | | | | |
| No discount available fo | or this item | | | | | | | | | |
| Paymen | t to vendor | Price | 3.50 USD | | | | | | | |
| | | Price | 0 | | USD | • | | | | |

! Please note that in order to benefit from autonomic calculation of amount of honorarium to the vendor, the following data has to coincide in translator's data and task data:

- Service type (translation/translator service/sworn translator)
- Language pair
- Urgency status (regular/urgent).

8.4. Translators rating and feedback

In order to sort existing translators per knowledge and service level, the following system features have been designed:

1. Evaluation (knowledge rate set by system user)

2. Rating (average grade for translation service with total quantity of tasks in square brackets).

Every feature is set up as separate tool or translators' knowledge measurement.

Below you will see the explanation of logics behind every of three modules.

Knowledge evaluation

According to OCLanguage workflow the translation agency is able to evaluate the knowledge of translator. By using evaluation module system the user is able to set mark that reveals knowledge level of the vendor. Evaluation range is not regulated – each translation agency sets it's own minimum and maximum. For example, one could evaluate translator's knowledge by putting mark from 1 to 10, other from A to F.

Translator is evaluated only in translator's data window.

| Knowledge evaluation | 9.9 |
|----------------------|-----|
| Pages per day | 15 |

Rating

Rating feature allows the system user to rate every task performed by the vendor. The mark range is from -2 to +2.

In order to rate the vendor's work, the system user should open task and in field "Work evaluation" choose one from available options.

| Work evaluation | (+2) - Excellent |
|--------------------|---------------------|
| | (+2) - Excellent |
| Include in invoice | (+1) - Good |
| Completed | (+0) - Satisfactory |
| compicted | (-1) - Bad |
| | (-2) - Very bad |

Rating for task can be changed at any time during project management process (right after task has been added to document). This means that initially set up mark could be changed, if needed.

In translators' section there is parameter "Rating", that reveals actual vendor ratings. Also, there are three colors that indicate rating status:

Green – positive rating

Blue – 0 rating

Red – negative ratings

| an: > Tran | slato | ors | | | | | | | |
|---------------|-------|--------------|---------------------------------|--------------|-----------|--|---------|------------|--------|
| Dele | te A | dd transla | tor | | | | | Search | |
| | Photo | Туре | Name, surname / Company name | Address | Available | Languages | | Evaluation | Rating |
| | ٢ | Leg. ent. | Fast translations Ltd. | | Yes | HUN->ENG, ENG->HUN, HUN->RUS, HUN->RUS, RUS->HUN, RUS->HUN | | 9.9 | З |
| | () | Leg. ent. | Karlis's company (349230423) | Riga, LATVIA | Yes | GER->RUS, ENG->RUS, LAV->RUS, FRE->RUS | | 9.6 | 0 |

8.5. Translators statistics

The system gathers statistics about translators' performance while handling tasks. In order to see the statistics about the total volume of translations done by a particular translator the user should take the following steps:

1. Open the translators database and click the translator, whose statistics you want to see.

| ranslators | | | | | | | | | |
|------------------|-------|--------------|---------------------------------|--------------|-----------|--|--------------|------------|--------|
| in > Translators | | | | | | | | | |
| | | | | | | | | | |
| Dele | ate A | dd transl | lator | | | | | | |
| Den | | | | | | | iii • | Search | |
| | Photo | Туре | Name, surname / Company name | Address | Available | Languages | | Evaluation | Rating |
| | ٢ | Leg. ent. | Fast translations Ltd. | | Yes | HUN->ENG, ENG->HUN, HUN->RUS, HUN->RUS, RUS->HUN | UN, RUS- | 9.9 | 0 |
| _ | 68 | Leg. | Karlis's company (349230423) | Riga, LATVIA | Yes | GER->RUS, ENG->RUS, LAV->RUS, FRE->RUS | | 9.6 | 0 |

2. The system will open the translator's overview window, where in "Translation statistics" field the system reveals the following statistics described in the table below.

| Parameter | Description | | | |
|---------------|--|--|--|--|
| Active tasks | Quantity of tasks, that are being handled by the | | | |
| | translator now | | | |
| Written tasks | Quantity of written tasks done by the translator | | | |
| Oral tasks | Quantity of oral tasks done by the translator | | | |
| Rating | Rating of translator among all the vendors | | | |

| Karlis's company | | | |
|--------------------------------------|-----------|---------------|--------------|
| Main > Translators > Edit translator | | | |
| | | | |
| Summary | ······ | Туре | Legal entity |
| | | Active tasks | 0 |
| | *** | Written tasks | 0 |
| | Photo | Oral tasks | 0 |
| | (7.41 KB) | Rating | 0 |
| | | | |

8.6. Translators schedule

Translators schedule was excluded from OCLanguage starting from version 7.0. However, this feature could appear in future versions of OCLanguage software.

8.7. Translators document management

Use the translators document management module to maintain accurate information about translator's resume, work examples, diplomas etc.

Translator's documents are available only in the translators' overview window.

Below you will see how to add and view the documents related to the translator:

1. In main menu click "Translators".



2. The system will open the translators' database. Click the translator to upload its documents.

| an | slato | rs | | | | | | | |
|--------|----------|-----------|---------------------------------|---------|-----------|---|---------|------------|--------|
| > Trar | nslators | | | | | | | | |
| | | | | | | | | | |
| Del | ete A | dd transl | lator | | | | | | |
| Der | | | | | | Ⅲ • | Search | | |
| | Photo | Туре | Name, surname / Company name | Address | Available | Languages | | Evaluation | Rating |
| _ | | Leg. | Fast translations Ltd. | | Yes | HUN->ENG, ENG->HUN, HUN->RUS, HUN->RUS, RUS->HU >HUN | N, RUS- | 9.9 | 0 |
| | 2.59 | ent. | | | | PHON | | | |

3. The system will open the translator's data overview window. Scroll down until you see "Translator's documents" section. Simply drag and drop the file you want to upload to the translator's business card.

Translator's documents



4. The system will save the uploaded document under "Translator's documents" section.

Translator's documents

| | w | | | | |
|---|----------------------|---|--|--|--|
| | ume.docx 1.13 KB) | | | | |
| = | â | * | | | |
Other option to upload documents is to click on empty space in the documents upload block.

Translator's documents

Kesume.docx (11.13 KB) The fill of the fil

8.8. Translators table

In order to open the Translators database, in the main menu click "Translators".



User can filter data in the Invoices database by using 3 methods:

1. Type letters or numbers in "Search" field and click "Enter".

| an | slator | rs | | | | | | | |
|--------|----------|-------------------|--|-------------------------|------------------|--|----|-------------------|-------------|
| > Tran | nslators | | | | | | | | |
| | | | | | | | | | |
| Dele | ete Ad | d translator | | | | | | | |
| | | | | | | | | | |
| | | | | | | | ₩. | LAV | |
| | Photo | Туре | Name, surname / Company name | Address | Available | Languages | ₩. | LAV Evaluation | Rating |
| | Photo | Type Leg. ent. | Name, surname / Company name Karlis's company (349230423) | Address Riga, LATVIA | Available Yes | Languages GER->RUS, ENG->RUS, LAV <mark>></mark> RUS, FRE->RUS | | | Rating 0 |

Below you will see a list of parameters (column names) the system searches data for:

- Name, surname / company name
- Languages
- Contact details (for instance, e-mail address, skype name).

! Please note that the data filter can be removed by deleting text in "Search" field and clicking "Enter".

2. Filter data by sorting data from A to Z and vice versa by clicking on the column name.

| ran | slato | rs | | | | | | | |
|-----------|---------|--------------|---------------------------------|--------------|-----------|--|----|------------|--------|
| in → Trar | slators | | | | | | | | |
| | | | | | | | | | |
| Del | ete A | dd translati | or | | | | | | |
| | | | | | | | ₩ | Search | |
| | Photo | Type 🕶 | Name, surname / Company name | Address | Available | Languages | | Evaluation | Rating |
| | ٢ | Leg. ent. | Fast translations Ltd. | | Yes | HUN->ENG, ENG->HUN, HUN->RUS, HUN->RUS, RUS->HUN, RUS->H | UN | 9.9 | 2 |
| | 0¢ | Leg. ent. | Karlis's company (349230423) | Riga, LATVIA | Yes | GER->RUS, ENG->RUS, LAV->RUS, FRE->RUS | | 9.6 | 0 |
| | | | | | Yes | | | | |

3. Review the columns that you want to see in the Translators table. To add or remove a particular column from the table, simply click and select the columns that you want (or do not want) to view in the Translators database. This feature is especially relevant, if there are big databases with many columns and/or relatively small monitor/tablet/smartphone screen.

! Please note that the system will save these settings for upcoming user sessions.

| an: > Tran | slato ^{slators} | rs | | | | |
|---------------|-----------------------------|--------------|---------------------------------|-----------|--|---|
| Dele | te A | dd transla | tor | | | Ⅲ ▼ Search |
| | Photo | Туре | Name, surname / Company name | Available | Languages | ✓ Photo ✓ Type |
| | ٢ | Leg. ent. | Fast translations Ltd. | Yes | HUN->ENG, ENG->HUN, HUN->RUS, HUN->RUS, RUS->HUN, RUS->HUN | Name, surname / Company name |
| | <u></u> | Leg. ent. | Karlis's company (349230423) | Yes | GER->RUS, ENG->RUS, LAV->RUS, FRE->RUS | Address Available |
| | ٩ | Indiv. | Stratelli Mia | Yes | ITA->ENG, ITA->ENG, ENG->ITA, ITA->RUS, ITA->RUS, RUS->ITA, RUS->ITA | ✓ Languages ✓ Evaluation |
| | 0 | Indiv. | Streptsova Anna | Yes | CZE->SLO, SLO->CZE, CZE->SLO, SLO->CZE, CZE->RUS, RUS->CZE, SLO->RUS, RUS->SLO | ✓ Rating 9.7 0 |

Translators table consists of the following columns:

| Field | Description |
|------------------------------|---|
| Photo | Photography of translator |
| Туре | Business type – Individual / Legal entity |
| Name, surname / company name | Translator's name, surname / company name |
| Address | Translator's place of residence |
| Available | Availability information |
| Languages | Language pairs the translator works with |
| Evaluation | Evaluation rate |
| Rating | Tasks rating |

8.9. CV of translator

The content of resume conforms to Europass CV standard. The translation agency manager is able to register the translator by himself or our developers can implement existing database from the previous software systems the translation agency used to operate with.

Content of resume is described in document "8.1. How to add translator".

8.10. How to add notary

In order to add a new notary follow the below steps:

1. In main menu click "Notaries".



2. Click "Add notary".



3. Fill in the details in the fields. Obligatory fields are marked with "*".

| Field | Description | | |
|---------------------|--|--|--|
| Name | Notary's name | | |
| Surname | Notary's surname | | |
| Address | Notary's address | | |
| Additional address | Notary's additional address, if applicable | | |
| Contact information | Notary's contact data | | |
| Office hours | Office hours of notary | | |

| Name | John |
|---------------------|---|
| Surname | Martin |
| Address | Riga, LV-1006, Skarnu Street 11, office 6 |
| Additional address | |
| Contact information | T.: +371 26590459 |
| | |
| | |
| | |
| | |
| Office hours | 9.00 - 18.00 |
| | |
| | |
| | |
| | |
| | Save |
| | |

3. Click "Add". The system will save a new record in the translators' table.

8.11. How to edit notaries' data

In order to edit notary's data follow the below steps:

1. In the main menu click "Notaries"



2. The system will open the notaries' database. Click the notary, whose data you would like to review.

| Notaries | | | | | | |
|------------------------|-----------|----------------------------------|--|--------------|--------|--------------|
| Main > Notaries | | | | | | |
| | | | | | | |
| Delete Add notary | | | | III • | Search | |
| Name | Surname | Address | Contact information | | | Office hours |
| 🔲 Екатерина Валерьевна | Белинская | Харьков, Сумская, 41 (стекляшка) | Белинська К.В. 80506064647 80973008239. Заве | рение 20 | грн | с 9 до 18:00 |

- 3. Edit the notary's data.
- 4. Click "Save". The system will save a new changed notary's card.

| Name | Екатерина Валерьевна |
|---------------------|--|
| Surname | Белинская-Орлова |
| Address | Харьков, Сумская, 41 (стекляшка) |
| Additional address | |
| Contact information | Белинська К.В. 80506064647 80973008239. Заверение 20 грн |
| Office hours | с 9 до 18:00 |
| | |

Save Delete

8.12. Notaries table

In order to open the Notaries database, in the main menu click "Notaries".



User can filter data in Invoices database by using 3 methods:

1. Type letters or numbers in "Search" field and click "Enter"

| Nota | aries | | | | | |
|-----------|-------------|---------|--|---------------------|------------|--------------|
| Main > No | otaries | | | | | |
| De | elete Add n | otary | | | | |
| | | | | | Ⅲ ▼ | Frankfurt |
| | Name | Surname | Address | Contact information | | Office hours |
| | Anna | Wooden | Am Hauptbahnhof, 60329 <mark>Frankfurt</mark> am Main, Germany | +49 69 239999 | | 9.00-16.00 |

System searches data according to all parameters (columns) in the Notaries database.

! Please note that the data filter can be removed by deleting text in "Search" field and clicking "Enter".

2. Filter data by sorting data from A to Z and vice versa by clicking on the column name.

| Nota Main > Nota | | | | | | | |
|---------------------|----------------|---------|---|---------------------|------------------|---------|--------------|
| Dele | ete Add notary | | | | | Court . | |
| | | | | | III • | Search | |
| | Name 🔺 | Surname | Address | Contact information | | | Office hours |
| | Anna | Wooden | Am Hauptbahnhof, 60329 Frankfurt am Main, Germany | +49 69 239999 | | | 9.00-16.00 |
| | Jan | Suveida | Čopova ulica 14, 1000 Ljubljana, Slovenia | +386 1 251 12 60 | | | 10.00-17.00 |
| | John | Welsh | 6-7, Kings Parade, Dale End, High St, Birmingham B4 7SY, UK | +44 121 236 0285 | | | 9.00 - 15.00 |

3. Review the columns that you want to see in the Invoices table. To add or remove a particular column from the table, simply click and select columns that you want (or do not want) to

view in the Notaries database. This feature is especially relevant, if there are big databases with many columns and/or relatively small monitor/tablet/smartphone screen.

! Please note that the system will save these settings for upcoming user sessions.

| Jota sin⇒Nota | ries | | | | | | |
|------------------|-------------------------|----------------------|----------------------------------|---|------------|------------------------|--|
| Dele | te Add notary | | | | Ⅲ ▼ | Search | |
| | Name | Surname | Address | Contract information | 🗹 Nam | | |
| | Екатерина Валерьевна | Белинская- Орлова | Харьков, Сумская, 41 (стекляшка) | Белинська К.В. 80506064647 80973(20 грн | | ess act information | |
| | Римма Павловна | Зинченко | Харьков ,Пушкинская, 32 | 0577171005, 0506341212. Заверени | Offic | e hours | |

Notaries table consists of the following columns:

| Field | Description |
|---------------------|----------------------------------|
| Name | Notary's name |
| Surname | Notary's surname |
| Address | Notary's residence address |
| Contact information | Contact information in text form |
| Office hours | Working hours information |

8.13. How to add designer

In OCLanguage system a designer is a person, who s responsible for DTP services.

In order to add a new designer follow the below steps:

1. In the main menu click "Designers"



2. Click "Add designer"



2. Fill in the details in the fields. Obligatory fields are marked with "*".

| Field | Description |
|-----------------|--|
| Name | Designer's name |
| Surname | Designer's surname |
| Address | Designer's address |
| Contact details | Designer's contact data |
| Pages/day | Specify, how many pages the designer is able to |
| | handle per day |
| Price | Specify the price per page |
| Software | Mark all programs that the designer works with. |
| | ! Please note, that the programs list is collected |
| | from Programs subsection (under Board). The |

| | translation agency itself maintains actual |
|-----------|--|
| | programs list. |
| Available | Check availability box, if the designer is available |
| | for handling DTP tasks. |
| | ! Please maintain actual availability information, |
| | because for handling DTP tasks the system will |
| | bring up only available designers. |
| Comments | Leave comments about the particular designer, if |
| | needed |

3. Click "Save". The system will save a new record in the designers' table.

| Name | Marie |
|-----------------|----------------------------|
| Surname | Wang |
| Address | |
| Contact details | E-mail • marie.w@gmail.com |
| | |
| | Add |
| Pages/day | 5 |
| Price | 6 |
| | |
| Software | Adobe Illustrator |
| | Adobe Photoshop |
| | V Deja Vu |
| | Microsoft Dynamics Akapta |
| | V MS Excel |
| | MS PowerPoint |
| | V MS Word |
| | Votepad |
| | ✓ OpenOffice |
| | ✓ SDLTrados |
| | Wordbee |
| Comment | |
| | |
| | |
| | |
| | |
| | h. |
| | |
| Available | |
| | Sive |

8.14. How to edit designer's data

In order to edit designer's data follow the below steps:

1. In the main menu click "Designers"



2. The system will open the designers' subsection. Click the designer, whose data you would like to review.

| D | esi | gners | | | | | | |
|------|--------|----------------|---------|--|-----------|------------|--------|-----------|
| Main | > Desi | gners | | | | | | |
| | Dele | te Add designe | er | | | Ⅲ ▼ | Search | |
| | | Name | Surname | Address | Pages/day | F | Price | Status |
| | | Anna | Wooden | Victoria Place, 115 Buckingham Palace Rd, London SW1W 9SJ, | 8.0 | 6 | 5.00 | Available |

3. Edit the designer's data.

4. Click "Save". The system will save a new changed designer's card.

| 1 |
|--------|
| |
| Delete |
| |

8.15. Designers table

In order to open the Designers database, in the main menu click "Designers".



In the designers table the user can filter the data by using Search option – type in letters or digits to filter the designers.

| Designers | | | | |
|---------------------|--|-----------|-------|-----------|
| Main > Designers | | | | |
| Delete Add designer | | | | enl |
| Name Surna | ne Address | Pages/day | Price | Status |
| Anna Woode | n Victoria Place, 115 Buckingham Palace Rd <mark>, London</mark> SW1W 9SJ, | 8.0 | 6.00 | Available |

Designers table is very flexible in terms of tailoring the selected data according to the translation agency needs. Any column can be removed or edited up to the translation agency request to developers of OCLanguage.

User can filter data in the Invoices database by using 2 methods:

1. Type letters or numbers in "Search" field and click "Enter"

| Des | igners | | | | |
|----------|--------------|---------|--|-----------|----------------|
| Main > E | esigners | | | | |
| D | elete Add de | esigner | | | III - London |
| | Name | Surname | Address | Pages/day | Price Status |
| | Anna | Wooden | Victoria Place, 115 Buckingham Palace Rd <mark>, London</mark> 5W1W 9SJ, | 8.0 | 6.00 Available |

Below you will see a list of parameters (column names) the system searches data for:

- Name
- Surname
- Address.

! Please note that data filter can be removed by deleting text in "Search" field and clicking "Enter".

2. Filter data by sorting data from A to Z and vice versa by clicking on the column name.

| esi(⇒ Desi | gners gners | | | | | |
|----------------|------------------|----------|---|-----------|------------|-----------|
| Dele | ete Add designer | | | | Ⅲ ▼ | Search |
| | Name | Surname | Address | Pages/day | Price 🔺 | Status |
| | Анна | Каримова | Москва, улица Таганская, 1/2 | 6.0 | 3.50 | Available |
| | Андрей | Ростер | Москва, ул. Шарикоподшипниковская, 11, стр. 5 | 5.0 | 4.50 | Available |
| _ | | | | | | |
| | Юлия | Попова | Киев, улица Семьи Кульженков, 14 | 7.0 | 4.50 | Available |

In order to improve the usability of the project management table, the user can use easily add or remove columns that it needs for working with project management table. The system will memorize users choice and supply the user with selected project table outlook every time, when the user logs in into the system.

| esigner | S | | | |
|----------------|-------------|--|-----------|--|
| in > Designers | | | | |
| Delete A | dd designer | | | Ⅲ → Searth |
| Name | Surname | Address | Pages/day | 🖉 Name |
| Anna Anna | Wooden | Victoria Place, 115 Buckingham Palace Rd, London SW1W 9SJ, | 8.0 | ' |
| | | | | ✓ Price✓ Status |

Designers table consists of the following columns:

| Field | Description |
|-------|-------------|
| | |

| Name | Designer's name |
|-----------|--|
| Surname | Designer's surname |
| Address | Designer's residence address |
| Pages/day | The amount of pages designer is able to handle per day |
| Price | Price per page |
| Status | Availability of designer: |
| | marked with green tick, if available |
| | marked with red cross, if not available |

9. E-mails

9.1. System automatized e-mails

To open OCLanguage e-mail server section, in the main menu click "Mailing templates -> Internal mailing".

| | OCLanguage 7. | .0 |
|----------|-------------------------|----|
| | | |
| ٢ | Projects | |
| 2 | Customers | |
| Þ | Translators | |
| 1 | Designers | |
| * | Notaries | |
| P | Documents | |
| | Accounting | |
| . | Management | |
| 1 | Mailing templates | ~ |
| | Internal mailing | |
| | Mailing for Customers | |
| | Mailing for translators | |

In this section the user can view and edit the content of e-mail templates that are automatically sent to recipients by the system itself.

! Please note that the system e-mail templates are subject to programming task for developers and are added along with the creation of new functionality, requiring an e-mail to be sent either to the Customer, translator or translation agency employee. Which means that the translation agency managers themselves are not able to create new system e-mails.

User can filter data in the E-mail templates database by using 3 methods:

1. Type letters or numbers in "Search" field and click "Enter" (the system searches according to template name).

| System messages | | |
|-------------------------------|----------|-------------|
| Main -> System messages | | |
| | | 💷 🗸 payment |
| Name | Туре | |
| Reminder for unclosed payment | Customer | Reset |
| Invoice for payment | Customer | Reset |

! Please note that data filter can be removed by deleting text in "Search" field and clicking "Enter".

2. Filter data by sorting data from A to Z and vice versa by clicking on the column name.

| System messages | ages | | |
|--|------|------------------|-------------------|
| Name 🔺 | | | Ⅲ ▼ Search |
| | | | |
| | | Туре | |
| Invoice for payment | | Type Customer | Reset |
| Invoice for payment New private message | | | Reset Reset |

3. Review the columns that you want to see in the Invoices table. To add or remove a particular column from the table, simply click and select the columns that you want (or do not want) to view in the E-mail templates database. This feature is especially relevant, if there are big databases with many columns and/or relatively small monitor/tablet/smartphone screen.

! Please note that the system will save these settings for upcoming user sessions.

| System mess | ages | | |
|--|------|---------------------------|----------------|
| Main \rightarrow System messages | | | |
| | | | |
| | | | Search |
| Name 🔺 | | Туре | |
| | | | |
| Invoice for payment | | Customer | Reset |
| Invoice for payment New private message | | Customer Administrator | Reset Reset |

Translation agency's managers are able to view and revise the text and formatting of every template. In the table below, you will see the explanation of logics behind every template:

| Template | Description |
|-------------------------------------|---|
| New private message (TA management) | Text of e-mail, which says that the translation |
| | agency manager has received a new message in |
| | system OCLanguage |
| Reminder for unclosed payment | Text of e-mail message, which reminds the |
| | Customer that payment for a specific order has |
| | not been closed yet |

| Password reset | Text of e-mail message providing a link for the user password reset |
|------------------------|--|
| Request for signed Act | Text of e-mail message reminding the Customer, that he needs to sign the Act and send it to the translation agency |
| Invoice for payment | Text of e-mail message providing a new invoice to the Customer |

In order to view and/or edit system e-mail follow the below steps:

1. In the main menu click "Mailing templates -> Internal mailing".



2. Click the template you want to view/edit.

| System messages lain > System messages | | |
|---|---------------|--------|
| | | |
| | | Search |
| Name | Туре | |
| New private message | Administrator | Reset |
| Reminder for unclosed payment | Customer | Reset |
| Password reset | Administrator | Reset |
| Request for signed Act | Customer | Reset |
| Invoice for payment | Customer | Reset |

3. The system will open the e-mail template in a new window. Have a look at the e-mail template name and content.



4. Edit e-mail template name and/or template itself. Template text can be revised using formatting panel above the template name.

| Invoice fo | or payment |
|-----------------------|--|
| Main > System message | es → Edit |
| | |
| | |
| Name | Invoice for payment |
| ⊁ • B | $I \underline{U} x^3 x_3 \underbrace{\$} \mathscr{I} \text{Helvetica Neue } \boxed{\blacksquare} \overleftarrow{\blacksquare} \overleftarrow{\blacksquare} \overleftarrow{\blacksquare} \overleftarrow{\blacksquare} \overleftarrow{\blacksquare} \overleftarrow{\blacksquare} \overleftarrow{\blacksquare} \overleftarrow{\blacksquare} \overleftarrow{\blacksquare} \overleftarrow{\bullet} \overrightarrow{\bullet} \overrightarrow{\bullet} $ |
| Dear Custom | ier, |
| Please see at | ttached invoice. |
| Also, invoice | can be downloaded from link: {LINK} |
| With Regards | 5, |
| Administratio | on of {LINK} |

E-mail text formatting panel consists of the following options:

| 7 | \mathbf{B} I $\underline{\mathbf{U}}$ \mathbf{x}^2 \mathbf{x}_z $\mathbf{\mathcal{G}}$ Helvetica Neue \mathbf{A} $\mathbf{\overline{I}}$ $\mathbf{\overline{II}}$ $\mathbf{\overline{III}}$ $\mathbf{\overline{III}$ $\mathbf{\overline{III}$ $\mathbf{\overline{III}$ $\mathbf{\overline{III}$ $\mathbf{\overline{III}$ $\mathbf{\overline{IIII}$ $\mathbf{\overline{IIII}$ $\overline{IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII$ | ? |
|---|---|---|
| | - Style | |
| | B - Bold | |
| | I - Italic | |
| | U - Underline | |
| | - Superscript | |
| | - Subscript | |
| | - Strikethrough | |
| | - Remove font | |
| | Helvetica Neue - Choose font | |
| | - Recent color | |
| | - Unordered list | |
| | E - Ordered list | |
| | - Paragraph | |
| | - Line height | |
| | - Table | |
| | s Link | |
| | - Picture | |
| | • - Video | |
| | - Insert horizontal rule | |
| | - Full screen | |
| | - Code view | |
| | ? - Help | |
| | | |

5. Click "Save" to save the changes made. If you wish to reset the template to initial setup, click "Reset".



9.2. Work with macros

System user is able to use macros in order to set desired parameters or variables, which OCLanguage engine should use, while sending specific e-mail. In the table below you will see the description of all variables that can be used in OCLanguage templates. In order to use variable in your template, simply copy it from the list and paste it into the e-mail template.

| CODEDESCRIPTION{NAME}User's name{SURNAME}User's surname{PATRONYMIC}User's patronymic{FIRM NAME}Company name{FIRM ADRES1}Legal address{FIRM ADRES1}Legal address, cont.{REG NR}Registration No.{LOGIN}Login{E-mail}E-mail{ACTIVATION CODE}DESCRIPTIONCODEDESCRIPTION{COMPANY NAME}Company name in Russian{COMPANY NAME ON ENGLISH}Company name in English Company name in English Company details |
|--|
| {SURNAME}User's surname{PATRONYMIC}User's patronymic{FIRM NAME}Company name{FIRM ADRES1}Legal address{FIRM ADRES12}Legal address, cont.{REG NR}Registration No.{LOGIN}Login{E-mail}E-mail{ACTIVATION CODE}Activation codeSystem variablesCODECODEDESCRIPTION{COMPANY NAME}Company name in Russian{COMPANY NAME ON ENGLISH}Company contacts{CONTACTS}Company details |
| {PATRONYMIC}User's patronymic{FIRM NAME}Company name{FIRM ADRES1}Legal address{FIRM ADRES1 2}Legal address, cont.{REG NR}Registration No.{LOGIN}Login{LOGIN}E-mail{ACTIVATION CODE}Activation codeSystem variablesCODE{COMPANY NAME}Company name in Russian{COMPANY NAME ON ENGLISH}Company contacts{CONTACTS}Company details |
| {FIRM NAME}Company name{FIRM ADRES1}Legal address{FIRM ADRES1 2}Legal address, cont.{REG NR}Registration No.{LOGIN}Login{E-mail}E-mail{ACTIVATION CODE}Activation codeSystem variablesCODECODEDESCRIPTION{COMPANY NAME}Company name in Russian{COMPANY NAME ON ENGLISH}Company contacts{CONTACTS}Company details |
| {FIRM ADRES1}Legal address{FIRM ADRES1 2}Legal address, cont.{REG NR}Registration No.{LOGIN}Login{E-mail}E-mail{ACTIVATION CODE}Activation codeSystem variablesCODE{COMPANY NAME}Company name in Russian{COMPANY NAME ON ENGLISH}Company name in English Company contacts{ESSENTIAL}Company details |
| {FIRM ADRES1 2}Legal address, cont.{REG NR}Registration No.{LOGIN}Login{E-mail}E-mail{ACTIVATION CODE}Activation codeSystem variablesCODEDESCRIPTION{COMPANY NAME}Company name in Russian{COMPANY NAME ON ENGLISH}Company name in English{CONTACTS}Company contacts{ESSENTIAL}Company details |
| {REG NR}Registration No.{LOGIN}Login{E-mail}E-mail{ACTIVATION CODE}Activation codeSystem variablesCODEDESCRIPTION{COMPANY NAME}Company name in Russian{COMPANY NAME ON ENGLISH}Company name in English Company contacts{CONTACTS}Company details |
| {LOGIN}Login{E-mail}E-mail{ACTIVATION CODE}Activation codeSystem variablesDESCRIPTIONCODEDESCRIPTION{COMPANY NAME}Company name in Russian{COMPANY NAME ON ENGLISH}Company name in English Company contacts{CONTACTS}Company details |
| {E-mail{ACTIVATION CODE}E-mail{ACTIVATION CODE}Activation codeSystem variablesCODEDESCRIPTION{COMPANY NAME}Company name in Russian{COMPANY NAME ON ENGLISH}Company name in English Company contacts{CONTACTS}Company details |
| {ACTIVATION CODE}Activation codeSystem variablesCODEDESCRIPTION{COMPANY NAME}Company name in Russian{COMPANY NAME ON ENGLISH}Company name in English{CONTACTS}Company contacts{ESSENTIAL}Company details |
| System variables CODE DESCRIPTION {COMPANY NAME} Company name in Russian {COMPANY NAME ON ENGLISH} Company name in English {CONTACTS} Company contacts {ESSENTIAL} Company details |
| CODEDESCRIPTION{COMPANY NAME}Company name in Russian{COMPANY NAME ON ENGLISH}Company name in English{CONTACTS}Company contacts{ESSENTIAL}Company details |
| {COMPANY NAME}Company name in Russian{COMPANY NAME ON ENGLISH}Company name in English{CONTACTS}Company contacts{ESSENTIAL}Company details |
| {COMPANY NAME}Russian{COMPANY NAME ON ENGLISH}Company name in English{CONTACTS}Company contacts{ESSENTIAL}Company details |
| {COMPANY NAME ON ENGLISH} Company name in English {CONTACTS} Company contacts {ESSENTIAL} Company details |
| ENGLISH}Company name in English{CONTACTS}Company contacts{ESSENTIAL}Company details |
| {CONTACTS}Company contacts{ESSENTIAL}Company details |
| {ESSENTIAL} Company details |
| |
| {DIRECTOR} Company Director |
| {CURRENCY} Default currency |
| {COMPANY REG NR} Company registration No. |
| {ADRES1} Legal address |
| {ADRES1 ON ENGLISH} Legal address in English |
| {ADRES2} Actual address |
| {ADRES2 ON ENGLISH} Actual address in English |
| {BANK} Bank |
| {ACCOUNT} Account |
| {CONTACT E-MAIL} Contact e-mail address |
| {WEB SITE} Website address |

! Important to notice, that the system variables require deep understanding of programing. Our specialists can assist you in studying macros and options that they make available.

9.3. Customer and Translators templates

In previous versions of OCLanguage there was the functionality of Customer and translator registration in OCLanguage for automatizing whole ordering and order fulfillment process. In the newest version of OCLanguage 7.0 there are no virtual offices neither for the Customer, nor for vendors. Thereby in comparison to the previous versions of OCLanguage, in "Mailing templates" section there are no workable system messages, that are created for sending to the Customer and vendors offices.

Also, due to the Russian Federation legislation changes in OCLanguage 7.0 there is no Customer/vendor proposal e-mail templates. For the Customers from other countries our developers can set up the e-mail templates for Customers (new pricelist announces, discount politics changes etc) and vendors (new language pairs announces, new pricing information for vendors etc).

10. System requirements

10.1. General information

OCLanguage is a very flexible solution and it requires small amount of resources; it can be installed on either of the following three platforms:

- 1. Hosting
- 2. Virtual server
- 3. Physical server.

The aforementioned options are relevant to those Customers who purchase the perpetual license of OCLanguage.

In case of SaaS license, OCLanguage is installed on the servers that belong to SIA OCL.

10.2. Software

OCLanguage has the following requests in regards to software platform lying on the top of physical server:

- Web Server: Apache
- Technology on server-side: PHP 5.4+, JavaScript
- Technology on client-side: HTML pages with JavaScript
- Database: MySQL 5+ (with virtual tables support)
- Recommended browser: Google Chrome.

10.3. Hardware

OCLanguage has the following requests to configuration of the server, on which the solution will be installed.

Required for system use:

- HDD minimum reserved disk space for system configuration (not project data): 170 MB
- CPU: 333 Mhz
- Minimum RAM: 64 MB.

In addition, required resources per user:

- Minimum additional RAM: 16 MB
- Recommended additional RAM: 64 MB.

Example: let us imagine you have 10 users on board, which are issuing system data 20 MB per day each. In this case, we would recommend you would have at least CPU 333 Mhz, RAM 768 MB, HDD 55 GB (for 1 year).

In a new version of OCLanguage 7.0 a special mechanism for tracking hardware resources usage was implemented. In the main menu the user can always see how many CPU and Hard drive resources are being used at the moment.



10.4. Data storage

In order to secure your stored data against loss, we recommend the following actions:

- Storage RAID level 1 or higher
- Regular data backup to tapes or cloud services.

On the database level, a database administrator manages access to the data.