



# Translation Office 3000, Version 10 Folder Automation Guide

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# 1 Folder structure

## Business Folder

TO3000, Version 10 automatically creates and maintains folder structure at any accessible location.

All workflow files (such as *client-sent files* and *files to be sent to clients*, as well as printable *invoices* and *quotes*) are stored in respective subfolders of *Business folder*.

*Business folder* by default it is created in the root of drive *C*. Location of Business folder on the Folders section of Advanced settings window. To specify a different business folder location:

1. Click menu **Settings > Advanced**;
2. Click **Folders** section;
3. Click **Change** button.

Having changed *Business folder* location you must move the content from the old *Business folder* manually.

## Different folder types

*Business* folder contains two sub-folders: *Clients* folder and *Projects* folder.

**Clients folders** (a separate folder for each client) are stored in the *Clients* folder. Each folder is named by unique **Client Code**. Please refer to Client folder topic for details.

**Project folders** (a separate folder is created for each project, *With Projects Mode* only) are stored in the *Project* folder. Each folder name contains unique *project code* project name. Please refer to Project folder topic for details.

**Client job folders** (a separate folder is created for each client job, *Without Projects Mode* only) are stored in the *Client* folder. Each folder name contains unique *client job code*.

These folders, as well as their subfolders are created automatically by clicking **Create** button in respective areas of the program (like **Main** tab of **Project** window).

## Automatic folder creation

With the help of automatic folder creation feature for any folder in TO3000, Version 10 you can define a number of subfolders to be automatically created upon creation of their parent folder.

To enable this feature for certain folder type, select **Automatic Folder Creation** checkbox on the tab of required folder in **Folders** section of **Advanced settings** window.

Every time *Client* or *Project* folder is created by TO3000, Version 10 Workstation, any folders or subfolders added to respective tab of **Folders** settings will be created in that folder automatically

To disable creation of customized folders clear **Automatic Folder Creation** on the corresponding tab of Folders section.

## 2 Client Folder

Client folder is a storage location for all files relevant to a particular client. This folder is created with the help of [Main](#) and [Files](#) tabs of the [Client](#) window.

The following subfolders are created automatically in [Client](#) folder, depending on the document being saved:

- [Prices](#) – in this folder all printable price-lists for current client are saved.
- [Quotes](#) – in this folder all printable quotes for current client are saved.
- [Invoices](#) – in this folder all printable invoices for current client are saved.
- [Payments](#) – in this folder all payment printouts of the current client are saved. In Without Projects Mode
- [Jobs](#) - in this folder all printable documents related to jobs are saved. In [Without Projects Mode](#) Jobs folder contains all client jobs' files. See more information at Client Jobs Folder.

Each client folder can contain custom subfolders which will be created automatically together with a client folder. These subfolders can be specified on the [Folders](#) section of [Advanced settings](#) window.

### 3 Project Folder (With Projects Mode only)

Primary purpose of every *Project* folder is to serve as a storage location for all files relevant to a particular **Project**. It can be created from the **Main** and **Files** tab of **Project** window. It is created automatically when any project-related document is saved.

Project's folder always contains at least three subfolders:

- **Incoming** (where you can store the files sent you by the *client*)
- **Work** (where you can store files while working on them)
- **Outgoing** (where you can put files ready to be sent to the *client*)

Each project's folder can contain custom subfolders which will be created automatically. These subfolders can be specified on the **Folders** section of **Advanced settings** window.

All *client jobs* are stored in project folders, not in clients' folders. However, having opened **Files** tab of **Client** window, you can quickly browse through project folders of this client, using **Related Folders** options. Analogically, client folder of the respective client can quickly be opened from the **Files** tab of **Project** window.

For consistency purposes name of the project's folder is the same as *project code* (the default value) and cannot be modified manually. Name of the project folder can include not only unique project code.

#### Project folder name

The way *Project* folders are named can be customized with on **Folders** section of Advanced settings window. Name of each *Project* folder can consist of the following components:

*Project code (obligatory)*

*Project name*

Click **Update Folders** button to apply changes to the names of all *Project* folders, created before. This feature is available only for name of projects' folders and does not have effect on other folder names.

## 4 Client Job Folder (Without Projects Mode only)

Primary purpose of every *Client Job* folder is to serve as a storage location for all files relevant to a particular **Client Jobs**. It can be created from the **Client Jobs** tab of **Client** window. It is created automatically when any client job-related document is saved. *Client Job* folders are saved under *Client/Jobs* folder.

*Client Job* folder always contains at least three subfolders:

- **Incoming** (where you can store the files sent you by the *client*)
- **Work** (where you can store files while working on them)
- **Outgoing** (where you can put files ready to be sent to the *client*)

Each *Client Job* folder can contain custom subfolders which will be created automatically. These subfolders can be specified on the **Folders** section of **Advanced settings** window.

All *client jobs* are stored in clients' folders.

For consistency purposes name of the *Client Job* folder is the same as *Client Job Code* (the default value) and cannot be modified manually.

## 5 File manager

### General Client and Project windows

General folder windows contain all available folders of certain type:



**Client Folders** – contains *folders of all clients* in database.



**Project Folders** – *folders of all projects* can be opened from this window.

Both general folder windows can be opened using [TO3000, Version 10](#) navigation bar. Click any of these icons to open appropriate folder window.

Folders are opened with built-in file manager. Interface of [TO3000, Version 10](#) file manager is very much like interface of [Windows Explorer](#) with some additional options.

The structure of specified folder group (*Project* folders in this particular case) is displayed in the form of folder structure tree to the left. Click any of these folders to view its contents in the field to the right.

### Folders of certain Clients and Projects

Files of any particular *client* or *project* can be viewed with the help of **Files** tab, available in each **Client** or **Project** window in [TO3000, Version 10](#). File manager interface in this case has more options, like [related folders](#) and [FTP access](#).

**Create** button: if the opened project does not have its folder created yet, click this button to automatically create folder of current project.

**Explore** button: click this button to open currently viewed folder in [Windows Explorer](#) window. Once opened, this window can be accessed with the help of **Open Folders** drop-down list.

**Search** button: opens common [Windows search](#) tool pre-set to search in currently viewed folder.

**Folder address** displays path to currently open folder. It can be quickly copied to clipboard by double-clicking this string and using context menu to select **Copy** option.

**Common file options** buttons can be used to perform standard operations with selected files and folders.

**Folder structure tree** and **contents of currently selected folder** are identical to those of general folders windows.

### Related Folders

[Related folders](#) contain information relevant to currently open folder. For example, working with *project files* you might also need access to Client folder, and vice-versa.

To quickly open related folders to currently opened folder, use **Related folders** field.


*Client related folders* are: *Project* folders of this client's projects, and *client FTP connections*.

*Project related folders* are: *Client* folder of selected project, and *client FTP connections*.

**Related Folders** list can also be used to open any folder on local PC, as well as to connect and work with FTP folder.

- Select **Local Folders** option to open folders on local PC.
- Select **Client FTP** to connect and work with FTP folders.

Any option selected in **Related Folders** list is opened in separate field of **Files** tab.

 **Note:** If you change the *client code* (it can be done from the **Main** tab of the **Client** window), **TO3000, Version 10** will attempt to rename the appropriate folder.

## Folder creation options in different TO3000, Version 10 windows

Edit windows for quotes, projects, jobs etc. have option for quick folder creation — **Create** and **Explore** buttons.

Also **Edit Job** windows have **Project Folder** tab for quick access to job work files.

**Project Folder** tabs have a number of own *related folders*. Use **Related Folders** drop-down list to quickly open any of them in the field to the right. The following folders can be quickly accessed from **Edit Job** window:

- **FTP client**
- **Client folder** of respective client.

## Switching between open folders

Using **Open Folders** drop-down list from the button panel of **TO3000, Version 10 Workstation** interface you can easily switch between the folders opened during the current **TO3000, Version 10** working session. Any folder you open using **TO3000, Version 10** (using **Explore** buttons) is automatically added to the list. When you need to switch, just select the necessary folder in the drop-down list and click **Go** button.




## 6 Built-in FTP client

TO3000, Version 10 features built-in *FTP client*, which can be used to quickly access *FTP folders* of clients to upload or download workflow files.

To access FTP client:

1. Open **Files** tab of any client or project.
2. In **Related Folders** field select **Client FTP** option.


### FTP access interface

- **FTP** indicator indicates connection status. Red indicator is displayed if FTP server status is disconnected. When the server is connected, indicator will change to green.
- Click **Connect/Disconnect** button to connect/disconnect to currently selected FTP server in nearby drop-down list.
- Click **Manage Connection** button  to create new FTP connection, edit or delete currently selected FTP connection.

### Creating new FTP Connection

In order to connect to FTP folder you will need to create an **FTP Connection** for this folder, which implies entering FTP server address, and login information, which later will be used by TO3000, Version 10 to log in to this FTP folder.

To create a new connection:

1. Click **Manage Connections** button 
2. Select **New connection ...** in the menu which appears:
3. Enter the **name** of new connection, **FTP server address**, **user name** (FTP login) and **password** (TO3000, Version 10 will memorize your password)
4. Select additional settings if you need to use them (**Use passive transfer**, **FTP over SSL/TLS**, **Keep connection alive**).
5. Click **OK** button to create this FTP connection.

### Connecting to FTP

Once FTP connection has been created, it can quickly be activated with the help of **FTP connections** drop-down list.

1. Select the required **FTP Connection** in the drop-down list to connect to that FTP server.
2. Click **Connect** button to display the contents of FTP in the field below.