2015 Winter Detailed List of Changes

Below you can find a list of all enhancements and updates available in version 2015 Winter (3.5).

New Views, Filters, Import and Export

- All main Browse Views have been redesigned.
- Now there's a better way for managing displayed columns and filter parameters.
- The Import function has been prepared anew. Uploading large and complex databases to the Home Portal is now easier. You can import customers, providers, their contact persons and rates, and CRM activities in a new and enhanced way.
- The Export feature allows generating files on "what you see is what you get" principle.

Customer Portal

- Showing resources and reference files in projects to customers is now optional.
- In project-level workflows, showing files from language tasks is optional.
- When ordering quotes or projects, customers will now see Services instead of Workflows.
- Quotes, projects and invoices have become searchable.

Vendor Portal

- Managing registered people has become easier: invitations to new users can be sent, admins and regular users can now be specified.
- Vendors can be allowed to enter the time they spent on a job in Job Manager.
- Vendor's experience & education accept Now as an option.

To learn more on how to start using the Vendor Portal go to: How Can I Use the Vendor Portal?

Integrations

QuickBooks and QuickBooks Online

- XTRF is now equipped with a new integration with QuickBooks Online. It has the same functionalities as the integration with QuickBooks desktop version (see: QuickBooks Online).
- For customer invoice synchronization, instead of invoice items data, the receivables data can be sent to QuickBooks or QuickBooks Online. Similarly, for vendor invoices, payables data can be sent instead of job details.
- Vendor bills and customer invoices are now linked with each other in QuickBooks desktop version by means of QB Jobs.
- See: QuickBooks and QuickBooks Online Integration Changelog and Compatibility.

Salesforce

- Salesforce integration can now synchronize sales opportunities (see: Field Mapping between XTRF and Salesforce).
- See: Salesforce Integration Changelog and Compatibility.

CAT Tool Integrations

- All CAT Tools
  - All CAT tools integrations have been refactored.
  - It is possible to change the way the project names in all CAT tools integrations are created by means of an expression entered in the Expressions subsection of the Templates section of the Configuration module.
  - Resource management has been improved (better notifications, changes in Languages parameters, "Description" field is mapped to "Note" in Memsource).
  - XTRF can handle more types of CAT analysis files, including more formats of files created by Dèjá Vu, SDL Trados Studio and XTM (see: CAT Analysis Import).
- memoQ
  - Support for memoQ 2014 R2 (v7.5.5 and newer) has been ensured (see: memoQ Integration - Supported memoQ Versions).
  - XTRF can now handle more memoQ resources: non-translatable lists and QA settings (see: memoQ Integration - Supported Resources).
  - In memoQ integration an additional project parameter (Project participants can communicate when online) has been added.
  - User passwords in memoQ are no longer updated with XTRF password during external project creation.
  - In memoQ projects created by means of the integration, the "Project" field now contains the XTRF task ID (instead of project ID), and the "Description" field now contains the XTRF task name and external project ID.
  - Changing job status in XTRF now affects the job/workflow status in memoQ (see: memoQ Integration - Job / Workflow Statuses).
  - See: memoQ Integration Changelog and Compatibility
- Memsource
  - Workflow steps configuration in a Memsource project template can now be overridden by XTRF workflow settings. You can use your Memsource project template settings but with different workflow steps set up in XTRF (see: Memsource Integration - Memsource Project Templates).
  - You can now choose the format of the analysis file which is automatically created after starting workflow with Memsource integration. It can be either CSV or LOG (see: Memsource Integration - CAT Analyses).
  - See: Memsource Integration Changelog and Compatibility
- SDL Trados Studio
  - Since SDL Trados Studio requires setting deadline for projects, it is now not possible to create a task in XTRF with workflow with SDL Trados Studio integration without a deadline.
  - See: SDL Trados Studio Integration Changelog and Compatibility
- XTM
  - In XTM integration, customers, providers and users will be created in XTM during project creation, and existing entries will be matched (see: Field Mapping between XTRF and XTM).
  - In XTM v8.7 and later, when a job is finished or restarted in XTRF, the job status in XTM will change, too (see: XTM Integration - Job Statuses).
  - See: XTM Integration Changelog and Compatibility

Other Improvements

- A new type of System Values, Services, has been added. Each service is mapped to a workflow. It is possible to change the mapping for individual clients,for example the same service can be mapped to different workflows for different clients.
- There are two possible rounding policies for values in the CAT receivables/payables and discounts/surcharges configurable in the Advanced Configuration.
- Contacts in a vendor profile is displayed in the same manner as in a client profile.
- Previewing e-mail and document templates is now simpler, faster and more powerful.
- Document templates can now be prepared in a way that allows generating them in the editable **`.docx`** format.
- The Multiple Change functionality allows to restore a job's status to Opened for many jobs from one task at once.
- Availability requests' deadline can be specified to minutes.
- Selecting an item in the Quick Search / History opens the item in the Edit mode (instead of Display mode).
- An optional setting to fill in Address fields can be made when creating or editing clients, vendors or contact persons .
- The Receivables tab in a task has been complemented with the ROI and Margin information.
- Sending CRM emails is now possible from vendor and client contact browsers.
- Email presenting all offers from an opportunity can be sent to a client for selection.
- Status tags and their colors have been redesigned.

Discontinued Functionality

- The Partner Zone for Providers and Provider Registration Form have been removed. They were replaced by the Vendor Portal.
- memoQ versions older than 2013 (6.5) are no longer supported in integration.
- The "Fixed" option has been removed from settings of browse filter parameters.