Project Display

A project's display is composed of multiple tabs where you can perform such actions as entering a project's main data and instructions, selecting the project's template and reviewing the project's financial information and the messages and CRM-related actions associated with it.

The Tabs of the Quote's Display

Main Data - Project

The Main Data tab contains the essential details of the project, including the project's unique name, client, contact person and the sales person responsible for the project.

Instructions - Project

In the Instructions tab, you can include with the project any special instructions necessary for its completion. Certain information is only visible to specific users: the field that you enter the instructions into determines which users can see what messages.

Documents - Project

In the Documents tab, you can review the purchase orders and confirmations to be used for the project and select the documents' recipients. Another feature of this tab is the option to send an individual document for each selected language combination, task or job instead of the entire project itself. The tab allows you to send necessary documents to the client, project managers and all the vendors involved in the project.

Finance - Project

In the Finance tab, you can review the revenue and cost of the overall project and each of its individual tasks.

Feedback - Project

CRM - Project

In the CRM tab, you can view all client related activities assigned to this project. Here you can also create new activities.

Messages - Project

When a user has entered his/her mailbox in Configuration, XTRF can keep a record in the Messages tab of all the work-related emails he/she has received associated with the project.

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