

New Features in TOM 13

Important CHANGES to previous versions

As a user of an earlier TOM version please read the following carefully before starting to work in TOM 13 . In some cases, minor **manual adaptations** are required.

- Throughout the program as well as in TOM documentation, what used to be called *User Settings* has now been renamed to **Program settings**.
- The previous *Start options* (user-specific options, mostly interface) were renamed to **User options**.
- **The number of DIGITS for the Invoice ID needs to be entered manually in Program Settings >Serial numbers !**
- **Credit notes** (new: also Cancellation Invoices) have their own **range of numbers** which can be configured in the same way as other IDs in Program Settings >Serial numbers.
- **Text elements for Cancellation Invoices** need to be added in all relevant Form Templates before this function can be used.
- Invoices **created in MS WORD** are saved as PDF files directly and cannot be edited any more in MS WORD.
- To **activate the Word Print function** for invoicing set the switch in the *Invoice Form Template!*

Discontinued modules

- URLs and Local Links
- Tasks

(could be reactivated by popular demand)

- TOM Mail (see below)
 - TM Calculator: Trados csv import and MemoQ Support
- ... *(MemoQ could be re-programmed.)*

New in TOM 13

New User Interface - Window Design

Owing to new FileMaker technology TOM 13 now comes with a more flexible scheme of window design and control. There is **no more single program window** that would contain all sub windows! Instead, specific views/windows can be placed all over the screen(s) in separate windows. You could thereby, e.g., have a calendar view open permanently on the second screen while doing project work on the main screen.

New Start window („Dashboard“)

Based on a Tiles layout design it provides structure and quick access to all TOM modules.

New Calendar module ...

The TOM calendar is now a JavaScript based separate module in a design similar to typical web calendars such as Google Cal. It displays project-related deadlines as well as general appointments and memos.

New Project Status: "Special project"

In a Special Project tasks can be managed independent of project status, i.e. it will be ignored in the 'Open' and 'Completed' queries. It thus provides an environment where test translations to freelancers, or training projects for new staff could be handled.

New Project List View ("Extended project list")

This view displays projects along with their related sub-projects. Six sub-projects are visible with the following details: **name, status, deadline and price**. More can be viewed when scrolling.

Hence there are now three project overviews available, each with a slightly varying focus of use:

- (1) classic list;
- (2) extended list (new);
- (3) sub-project list.

To make the Extended Project List your **default project view** you can set this option in User Settings right from the Dashboard.

Zoom function for use on small-screen devices (tablets, even smartphones.)

Toggles between 'Enlarged' and 'Standard' zoom factor while positioning the window

accordingly. This is very useful if you access your desktop TOM installation through a Windows Remote Desktop client or through Teamviewer/AnyDesk from a mobile devices.

Program Logs

The **process log** records user actions: create, edit, delete, and view. User navigation and action can thus be stored and analysed.

Another log, the **Changes log**, records the details of record creation and changes to existing records. So far, this includes changes in client profiles, projects and outgoing invoices.

Another log, the **Deletion log**, records the details of deleted records (clients and [sub-] projects) to keep record history transparent even after deletion which may have been unintentional.

Invoicing redesigned

In most countries, accounting standards provide strict regulations regarding invoicing and related processes. Generally, invoicing/accounting systems and processes should be protected against intervention and manipulation by users. The same is true for related areas such as project/order data - the base for invoice creation. In addition, all business processes should be transparent and documented. These aspects could increasingly become issues in tax inspections by financial authorities.

Transparence

TOM's new log systems make user actions transparent and data history traceable. While the **Changes log is to some extent option i.e. it can be deactivated, this option does not extend to processes connected with invoicing.**

When you make changes to order data AFTER INVOICING (yes, this is still possible!), then (1) this will be logged and highlighted in the **Changes log**, (2) you are prompted to add an explanation.

Invoice Cancellation

Invoice items in Finances/Outgoing invoices can no longer be deleted, but only cancelled.

The new 'Cancellation Invoice' option extends the previous Credit Note function. In a cancellation invoice the **entire invoice amount** is cancelled, while the Credit note function may credit **partial amounts**.

A cancellation invoice lists all invoice items with negative amounts and could be sent to the client. The invoiced sub-projects and projects are reset to "Completed".

The entire process is logged in the Changes log.

Users of existing TOM versions need to add text elements in the relevant Form Templates in Program Settings!

Non-Editability of Invoice data

In Outgoing Invoices List view the invoice amounts cannot be changed any more manually - however, in a reprint of the invoice any changed order data will reflect in changed invoice data (and logged).

Protected PDF / Direct PDF from MS Word

PDF files produced in TOM layouts (standard process) are write-protected.

"WORD invoices" no longer come out as "ready-to-edit" MS Word documents but as the final PDF/A file, which they are supposed to be when sent to your clients.

Finances: Create e-mail reminders

The e-mail template text contains placeholders for invoice number, total amount and das invoice date. To edit the template go to *Program Settings >Forms >E-Mail >Reminder*.

The original invoice is attached to the e-mail, provided the PDF file is stored in the designated folder under the link saved in TOM at the time of invoicing.

Option: Project and Invoice IDs as random number

In order to make it harder to draw conclusions regarding order and invoicing situation the automatic number serious may include a random factor of 3.

Data maintenance to comply with GDPR

Businesses operating in the EU are obliged to set up and document their internal data protection policy, with the key aspect of removing unused personal data after a certain period of time. The DP module in TOM 13 offers a flexible system of finding/filtering and deleting/anonymizing unused personal data in address books and from projects and quotes.

- In addition, TOM 13 offers a template for generating Data Disclosure Statements in a flash.

Add new client contact while inputting a new order

After receiving an order from a new worker at client's company you can add this contact to the client profile without quitting the project window.

TP Creator in Quotes

This little helper to create multiple sub-projects quicky has been made available in Quotes, too.

Integration of web mail interface

Many e-mail providers offer a web interface for the online management of e-mail traffic (G-Mail, Hotmail etc.). TOM's Mail module offers direct access to this web interface.

Messages of high importance can now be dragged into the TOM database manually from here.

Translator Search

Two options have been added to the so called Filter Search:

- "Show only Preferred" as an additional filter
- **Visibility of translator details** (prices, languages etc.) in **List View**; the data section is toggled by clicking the desired option.
- The group e-mail function there is now a second template .

Clients list

- More info (job figures etc.), neue administrative function: edit client status, direct access to edit profiles

Reporting

The **HTML Sales Reports** are now available as **Excel files** as well.

Limitation: only one report table is displayed instead of two as in HTML.

- The **'Suppliers' report** now includes figures from **review jobs** as well, summing up both job types to calculate the 'Top x' suppliers.
- An **Error report** displays all sub-projects in the database in which the currency exchange rate is missing (a possible source of errors in the reports in general)