



RADIX

Radixtool

Documentation

Radix

July 20, 2023

This PDF was generated from docs.radixtool.com on July 20, 2023. Always check docs.radixtool.com for the latest.

Table of Contents

Introduction	1
Purpose of Radix	1
Key Features	1
Benefits of Using Radix	2
Getting Started	3
Getting Started	3
Administration	6
Units	6
Services	7
Language Pair Configuration	9
Managers Configuration	10
Specializations	13
Tags Configuration	15
Priorities Configuration	17
Clients and Projects	20
Clients and Projects	20
Projects	21
Vendors	24
Vendors	24
Campaigns	25
Prices	28
Prices	28
Jobs and Tasks	30
Job Management	30
Job Details	31
Financial Management	33
Financial Management - Vendor	33
Financial Management - Client	34
Dashboard	35

Dashboard.....	35
Reports	37
Reports	37
Configuration.....	39
Notifications and Communication	39
Settings and Customization.....	40
Vendor Access Portal	42
Vendor Access Portal.....	42
Glossary	44

Introduction

Welcome to Radix, a comprehensive translation agency management software designed to streamline your workflow and optimize your translation projects. With Radix, you can effectively manage your clients, vendors, documents, and finances all in one centralized place.

Purpose of Radix

Radix is specifically developed to address the challenges faced by translation agencies in managing their operations efficiently. By providing a single platform for managing clients, vendors, and translation projects, Radix simplifies and automates various tasks, allowing you to focus on delivering high-quality translation services to your clients.

Key Features

Centralized Vendor Database

One of the core features of Radix is its centralized vendor database. It enables you to store and manage all your vendors' information, including their skills, expertise, availability, rates, and contact details. With this comprehensive vendor database at your fingertips, you can easily search, filter, and select the most suitable vendor for each translation project, ensuring high-quality output and efficient collaboration.

Campaigns for Vendor Recruitment

Radix offers a unique feature called "Campaigns" that allows you to launch recruitment campaigns for external vendors. By creating a public link and sharing it with potential vendors, you can invite them to apply and showcase their skills and experience. This feature simplifies the process of finding new vendors and expanding your network of language experts, ensuring a diverse pool of qualified professionals for your translation projects.

Streamlined Workflow Management

Efficient project management is vital for a successful translation agency, and Radix provides robust tools to streamline your workflow. From creating and assigning translation projects to tracking their progress, you can easily manage tasks, set deadlines, and allocate resources within the platform. Automated notifications and task reminders keep everyone involved in the project informed and ensure timely delivery.

Financial Management

Managing the financial aspects of your agency is made easier with Radix. The system enables you to track client payments, generate invoices, and handle vendor expenses and payments. Financial reports provide valuable insights into your agency's revenue, costs, and profitability, helping you make informed business decisions.

Benefits of Using Radix

- Centralized and organized vendor database for efficient vendor management.
- Simplified vendor recruitment through the "Campaigns" feature.
- Streamlined workflow management for improved project efficiency.
- Comprehensive financial management tools for better financial control.
- Increased productivity and reduced administrative tasks, allowing more focus on delivering high-quality translation services.

Getting Started

Getting Started

Welcome to Radix! This section will guide you through the process of getting started with our translation agency management software. Follow the steps below to set up your account, configure the tool according to your agency's needs, and start managing your translation Jobs efficiently.

Step 1: Setting Up Units

Creating Units

1. Navigate to the settings section of the application.
2. Configure the units that your agency needs according to the services that you provided.

Step 2: Setting Up Services

Creating Service

1. Navigate to the settings section of the application.
2. Configure the services that your agency provides, such as translation, desktop publishing (DTP), localization (LSO), editing, and review. Customize the service names and descriptions to align with your agency's terminology.

Step 3: Setting Up Managers

Creating Managers

1. Navigate to the settings section of the application.
2. Configure the services that your agency provides, such as translation, desktop publishing (DTP), localization (LSO), editing, and review. Customize the service names and descriptions to align with your agency's

terminology.

Step 4: Creating Clients

Creating Clients

1. In the application's navigation menu, locate the "Clients" section.
2. Click on "Add New Client" and fill in the necessary client information, including contact details and any specific requirements.
3. Save the client's information to create their profile within the system.

Step 5: Adding Vendors

Creating Vendors

1. Navigate to the "Vendors" section in the application.
2. Click on "Add New Vendor" to create a vendor profile.
3. Enter the vendor's details, including their skills, availability, rates, and contact information.
4. Save the vendor's information to add them to your centralized vendor database.

Step 6: Creating Jobs

Creating Jobs

1. In the application's navigation menu, select the "Jobs" section.
2. Click on "Create New Job" to initiate a new translation request from a client.
3. Fill in the job details, such as the source language, target language, deadline, and any specific instructions.
4. Divide the job into tasks and assign each task to a vendor based on their skills and availability.

Notes

Congratulations! You have completed the initial setup process and are now ready to manage your agency's

translation Jobs efficiently with Radix.

Administration

Units

Each service in Radix can be associated with specific units of measurement. This customization allows you to accurately measure and quantify the work performed for each service.

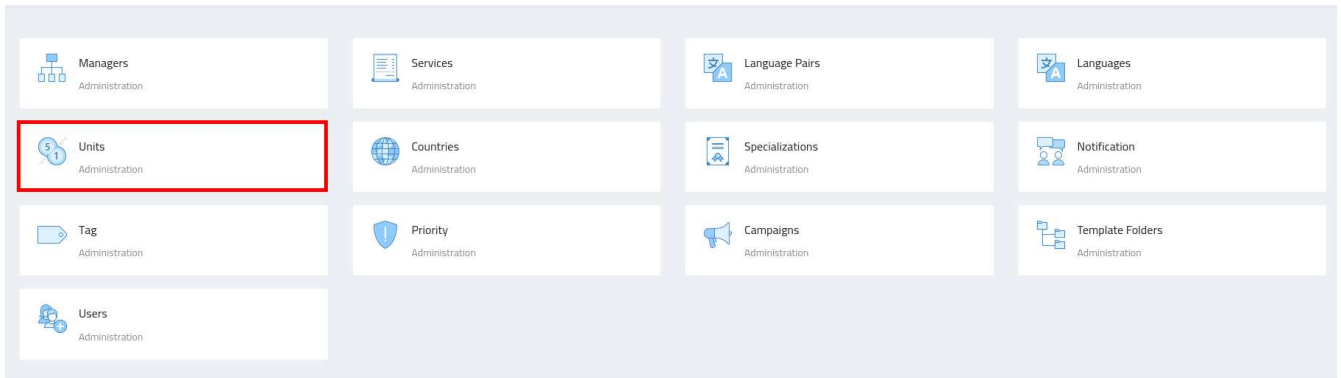


Figure 1. Admin section

Configuring Units

- Navigate to the Admin section, where you'll find the "Units" configuration.

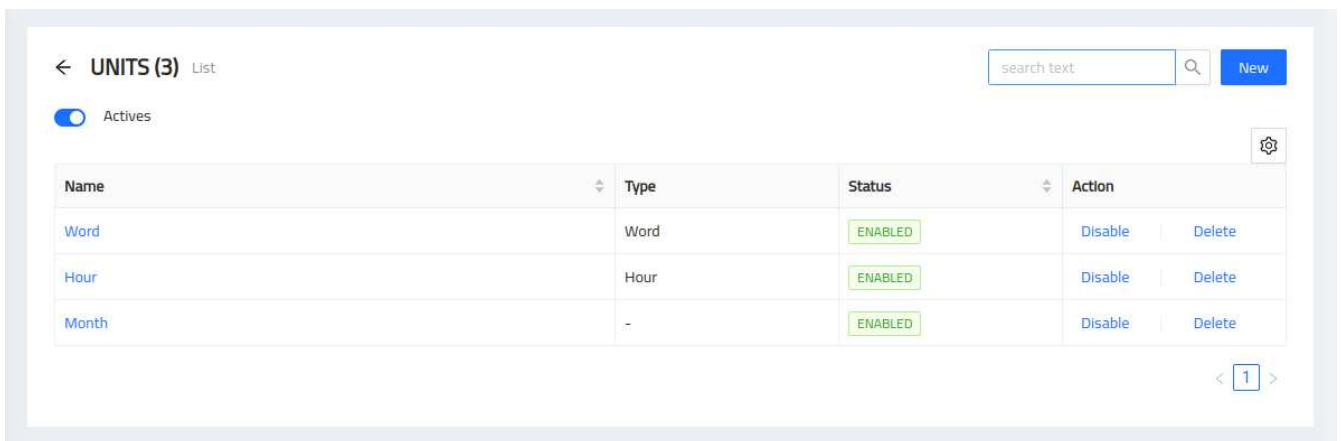


Figure 2. List of available units.

Adding a New Unit

- Click on "New" to create a new unit entry.
- Enter the name and description of the unit you want to add.

- Save the unit to add it to your list of available units.

Editing Existing Units

- Locate the unit you wish to edit in the list of configured units.
- Click on the name link next to the respective unit entry.
- Update the unit name or description as needed.
- Save the changes to update the unit configuration.

Removing a Unit

- Find the unit you want to remove from the list of configured units.
- Click on the "Delete" button associated with the respective unit entry.
- Confirm the removal to delete the unit from your configured units.

Notes

Remember, Radix is designed to provide you with the flexibility to customize your services and units of measurement based on your agency's specific requirements. This ensures that you can accurately measure, track, and bill for the work performed by your agency.

Services

The Services feature in Radix allows you to configure and manage the services your agency provides. Whether you specialize in translation, review, linguistic sign-off, desktop publishing, or other services, this feature provides the flexibility to define and customize your offerings according to your agency's needs.

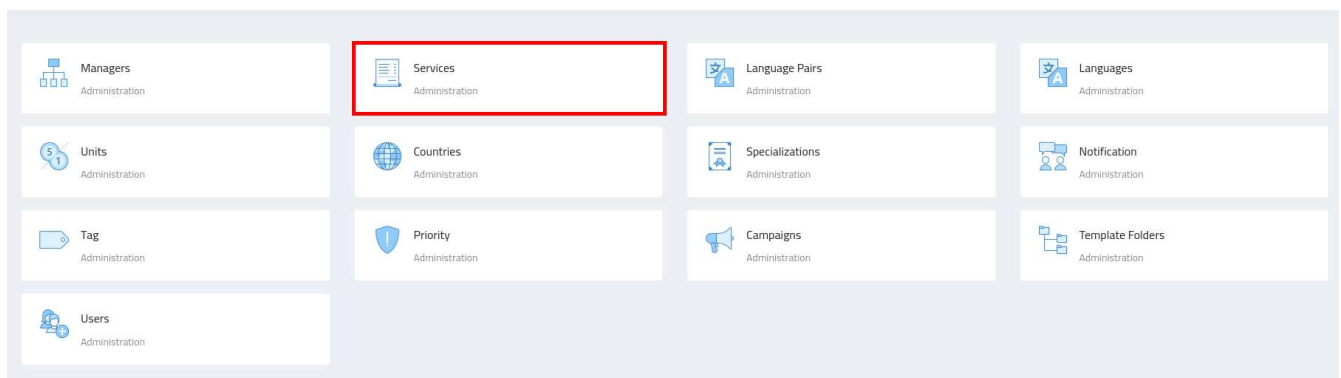
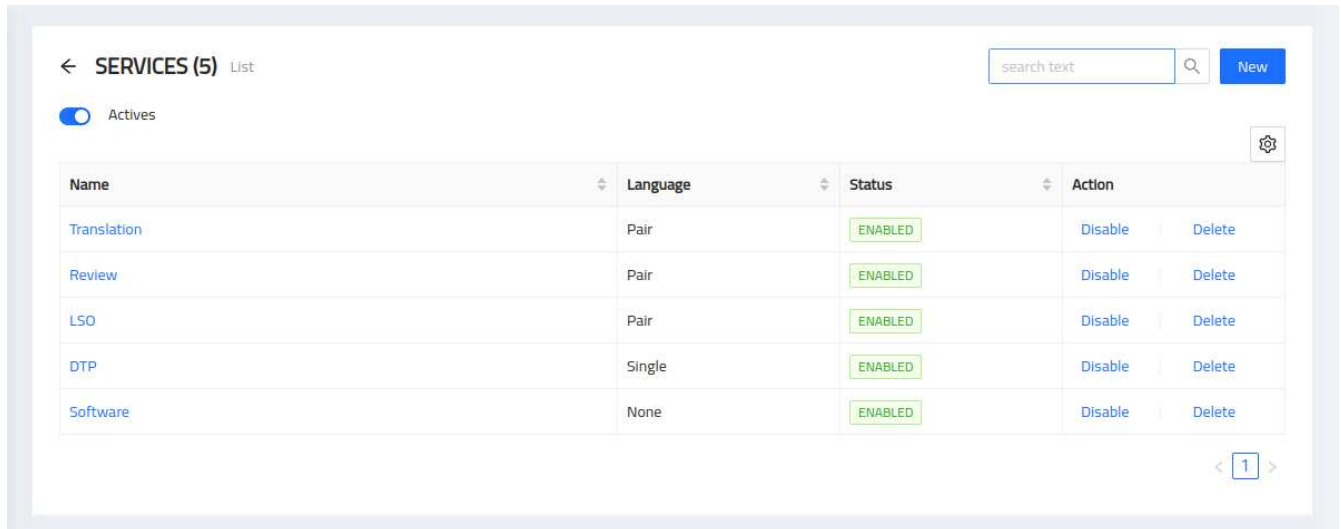


Figure 3. Admin section

Configuring Services

- Navigate to the admin section, where you'll find the "Services" configuration.



The screenshot shows a web interface for managing services. At the top, there is a header with a back arrow, the text 'SERVICES (5) List', a search input field with the placeholder 'search text', and a 'New' button. Below the header, there is a toggle switch labeled 'Actives' which is currently turned on. A table lists five services: Translation, Review, LSO, DTP, and Software. Each row includes columns for Name, Language, Status, and Action. The Status column shows 'ENABLED' in a green box. The Action column contains 'Disable' and 'Delete' links. A pagination control at the bottom right shows '1' in a box with arrows.

Name	Language	Status	Action
Translation	Pair	ENABLED	Disable Delete
Review	Pair	ENABLED	Disable Delete
LSO	Pair	ENABLED	Disable Delete
DTP	Single	ENABLED	Disable Delete
Software	None	ENABLED	Disable Delete

Figure 4. List of available services

Adding a New Service

- Click on "New" to create a new service entry.
- Enter the name and description of the service you want to add.
- Define the specific units of measurement for the service, such as word count, hours, or any other relevant metric.
- Save the service to add it to your list of available services.

Editing Existing Services

- Locate the service you wish to edit in the list of configured services.
- Click on the name link next to the respective service entry.
- Update the service name, description, or units of measurement as needed.
- Save the changes to update the service configuration.

Removing a Service

- Find the service you want to remove from the list of configured services.
- Click on the "Delete" button associated with the respective service entry.
- Confirm the removal to delete the service from your configured services.

Language Pair Configuration

The language pair configuration allows your agency to define and manage the specific language combinations used in your translation projects. With this feature, you can specify the source language and target language for each translation task, ensuring accurate communication and efficient project management. Here's how it works:

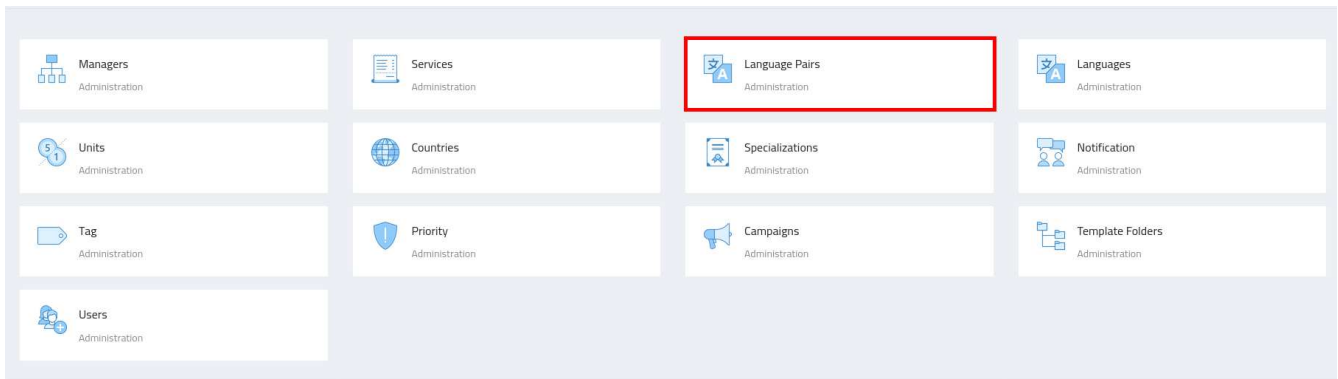


Figure 5. Admin section

Configuring Language Pairs

- Navigate to the Admin section, where you'll find the "Language Pairs" configuration.

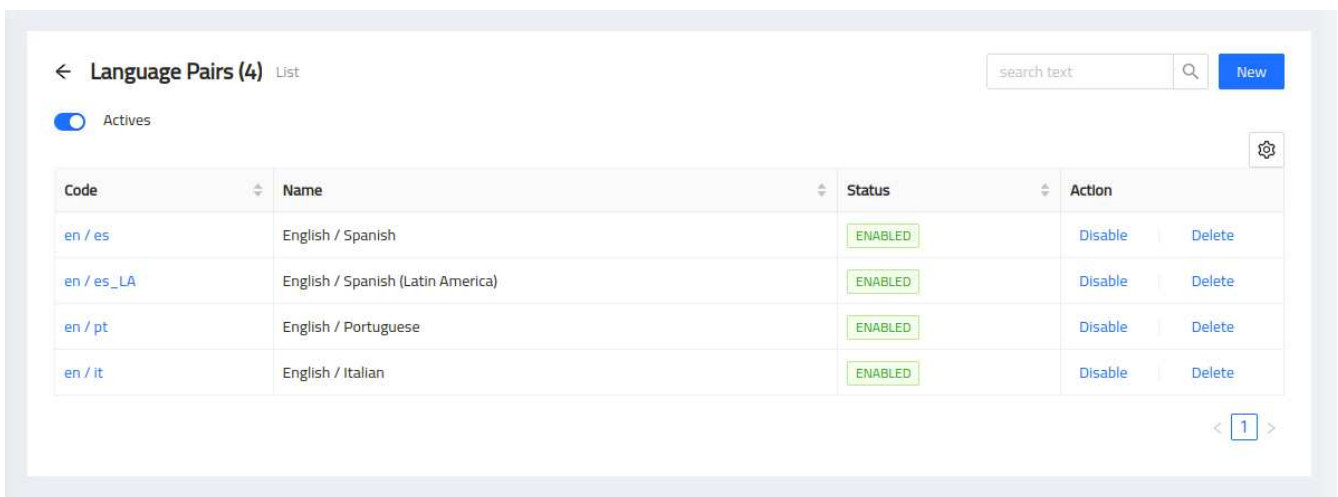


Figure 6. List of Language Pairs.

- View a list of all the available language pairs that your agency works with.
- Each language pair consists of a source language and a target language.
- This list helps you easily identify and select the appropriate language pair for your translation Jobs/Tasks.

Adding a New Language Pair

- Click on "New" to create a new language pair entry.
- Specify the source language and target language for the new pair.
- Save the language pair to add it to your list of available language pair.

Editing Existing Language Pair

- Locate the language pair you wish to edit in the list of configured language pairs.
- Click on the name link next to the respective language pair entry.
- Update the source language or target language as required.
- Save the changes to update the language pair configuration.

Removing a Language Pairs

- Find the Language Pair you want to remove from the list of configured Language Pairs.
- Click on the "Delete" button associated with the respective Language Pair entry.
- Confirm the removal to delete the Language Pair from your configured Language Pairs.

Notes

NOTE

Having control over your language pair configuration enables your agency to work efficiently, maintain accurate project documentation, and match the right translators to each task.

It allows you to customize your language offerings to meet the diverse needs of your clients and ensure smooth communication across different language pairs.

Managers Configuration

The Managers Configuration section allows you to manage and configure managers who have access to the system. Managers are users with administrative privileges and can perform various tasks within the agency's account.

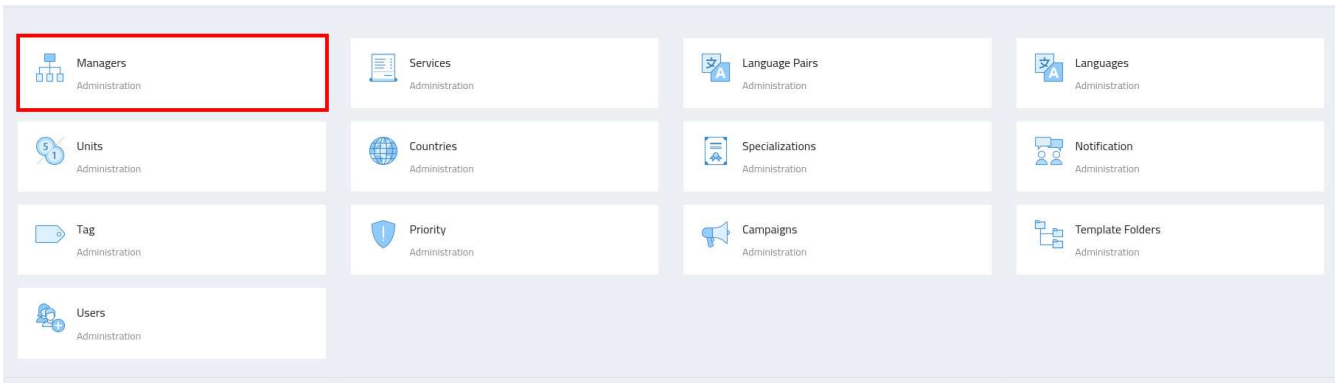


Figure 7. Admin section

Configuring Managers

- Navigate to the Admin section, where you'll find the "Managers" configuration.

The screenshot shows the 'MANAGERS (5) List' page. It includes a search bar, a 'New' button, and a table of managers. The table has columns for Name, EMail, Skype, Has Access, Status, and Action. The 'Actives' toggle is turned on.

Name	EMail	Skype	Has Access	Status	Action
Manager, Project	pm@company.com		YES	ENABLED	Disable Delete
Manager, Vendor	vendors@company.com		NO	ENABLED	Disable Delete
Manager, Admin	admin@company.com		YES	ENABLED	Disable Delete
Manager, Paula	paula@company.com		YES	ENABLED	Disable Delete
Doe, Bill	bill@company.com		INVITED (Resend mail)	ENABLED	Disable Delete

Figure 8. List of available managers

Adding a Manager

To add a new manager, follow these steps:

1. Click on the "New" button.
2. Enter the manager's name and contact information.
3. Set the appropriate access privileges for the manager.
4. Save the manager's details.

Editing a Manager

To edit an existing manager, follow these steps:

1. Locate the specific manager you want to modify.
2. Click on the "Edit" button next to the manager.
3. Update the manager's name, contact information, or access privileges.
4. Save the changes.

Removing a Manager

To remove a manager, follow these steps:

1. Locate the specific manager you want to remove.
2. Click on the "Delete" button next to the manager.
3. Confirm the removal when prompted.

Note: Removing a manager will revoke their access to the system and all associated permissions.

Manager Access and Permissions

Managers have different levels of access and permissions within the system. The available access privileges may include:

Admin Manager

As an Admin Manager, you have full control over the application settings and customization. You can configure agency data, set up user permissions, manage notifications, and handle system-wide configurations.

Project Manager

As a Project Manager, your primary focus is on overseeing and managing the Jobs/Tasks within the system. You can create and assign Jobs, track Task progress, assign tasks to vendors, and monitor Job/Task deadlines.

Finance Manager

The Finance Manager role revolves around financial management within the software. You can generate invoices, track payments, manage purchase orders, and ensure smooth financial transactions between the agency, clients, and vendors.

Vendor Manager

As a Vendor Manager, your role centers around managing the vendor ecosystem. You can add and manage

vendor profiles, track their skills and availability, set up pricing, and oversee vendor assignments to tasks and projects.

Please ensure that managers are granted appropriate access privileges based on their roles and responsibilities within the agency.

Notes

One important feature in the Manager form is the "Can log in" checkbox. By checking this box during manager creation or editing, you enable the manager to access the system and perform their assigned tasks. When this checkbox is selected, the system automatically triggers an invitation email to the manager, prompting them to create their password and gain access to the system.

We highly recommend that you carefully manage the permissions and access rights of each manager to ensure that they have the appropriate level of authority for their assigned responsibilities. This helps maintain the security and integrity of your agency's data and operations.

Specializations

The Specializations section allows you to configure and manage the list of skills or specializations that vendors can possess. Specializations help categorize vendors based on their expertise in specific domains or industries. Each agency can create, update, or remove specializations according to their needs.

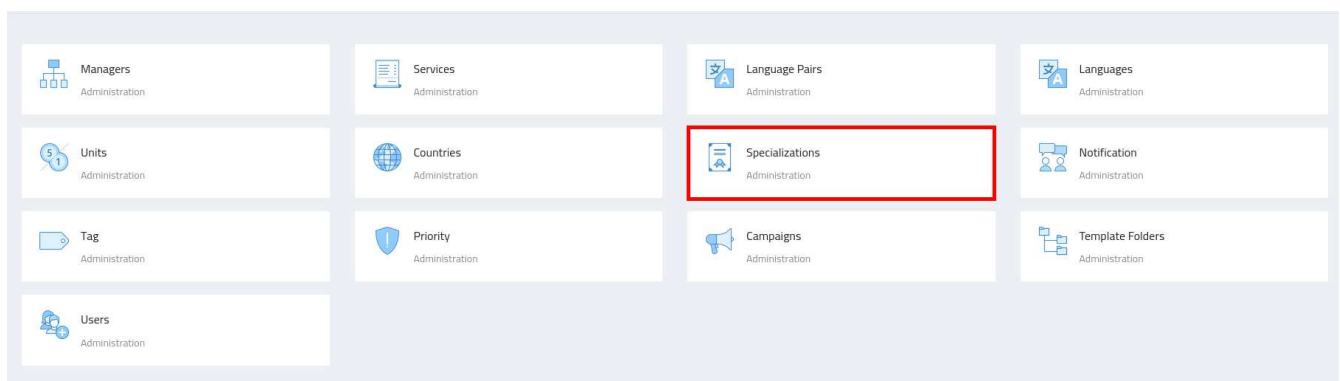


Figure 9. Admin section

Configuring Specialization

- Navigate to the admin section, where you'll find the "Specialization" configuration.

Name	Services	Status	Action
Finance	All	ENABLED	Disable Delete
Technical	Translation, Review, LSO, Edicion, Translation & Review, AA Traduccion	ENABLED	Disable Delete
Information	Translation, Review, LSO, Edicion, Translation & Review	ENABLED	Disable Delete
Marketing	Translation, Review, LSO, Edicion, Translation & Review	ENABLED	Disable Delete
Tourism	Translation, Review, LSO, Edicion, Translation & Review	ENABLED	Disable Delete
Life Science	Translation, Review, LSO, Edicion, Translation & Review	ENABLED	Disable Delete

Figure 10. List of available Specializations

Adding a Specialization

To add a new specialization, follow these steps:

1. Click on the "Add Specialization" button.
2. Enter the name or title of the specialization (e.g., Medicine, Legal, Financial).
3. Save the specialization.

Editing a Specialization

To edit an existing specialization, follow these steps:

1. Locate the specific specialization you want to modify.
2. Click on the "Edit" button next to the specialization.
3. Update the name or title of the specialization.
4. Save the changes.

Removing a Specialization

To remove a specialization, follow these steps:

1. Locate the specific specialization you want to remove.
2. Click on the "Remove" button next to the specialization.
3. Confirm the removal when prompted.

Assigning Specializations to Vendors

After creating the specializations, you can assign them to vendors based on their respective areas of expertise. This helps in matching vendors with suitable jobs and tasks.

To assign specializations to a vendor:

1. Navigate to the Vendor section.
2. Select the vendor you wish to assign specializations to.
3. Choose the relevant specializations from the list.
4. Save the changes.

Note: Specializations are used to enhance vendor search and selection processes, allowing you to find the most suitable vendors for specific projects or tasks based on their expertise and skills.

Tags Configuration

The Tags Configuration section allows you to manage and configure tags that can be applied to vendors for organizational purposes. Tags help categorize and group vendors based on specific criteria or attributes. These tags are only visible to agency managers and are not displayed to vendors.

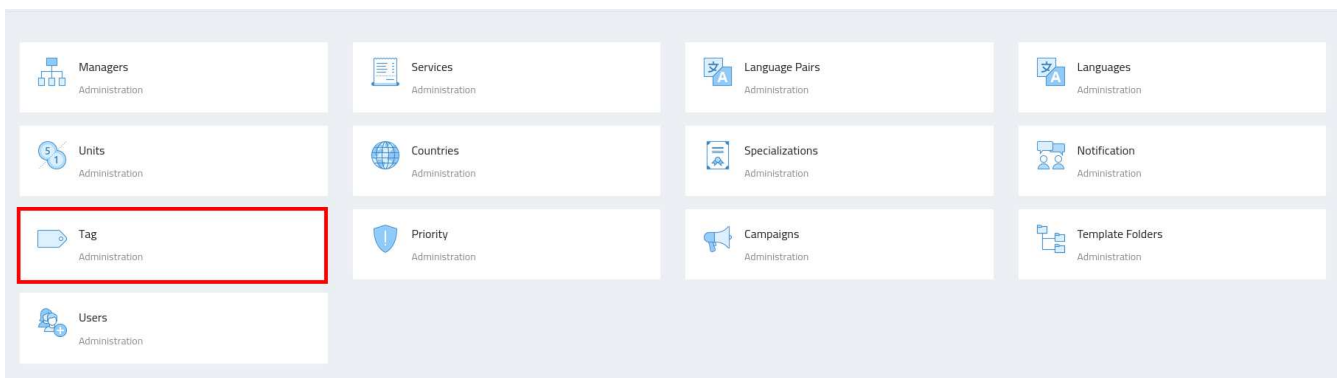


Figure 11. Admin section

Configuring Tags

- Navigate to the admin section, where you'll find the "Tags" configuration.

The screenshot shows a web interface for managing tags. At the top left, there is a back arrow, the text 'TAGS (2) List', and a search bar with the placeholder 'search text' and a magnifying glass icon. To the right of the search bar is a blue 'New' button. Below the search bar is a toggle switch labeled 'Actives' which is currently turned on. In the top right corner, there is a gear icon for settings. The main content is a table with the following data:

Name	Type	Status	Action
ISO 17001/2	VENDOR	ENABLED	Disable Delete
ISO 9001	VENDOR	ENABLED	Disable Delete

At the bottom right of the table, there is a pagination control showing '< 1 >'.

Figure 12. List of available Tags

Adding a Tag

To add a new tag, follow these steps:

1. Click on the "Add Tag" button.
2. Enter the name or title of the tag.
3. Save the tag.

Editing a Tag

To edit an existing tag, follow these steps:

1. Locate the specific tag you want to modify.
2. Click on the "Edit" button next to the tag.
3. Update the name or title of the tag.
4. Save the changes.

Removing a Tag

To remove a tag, follow these steps:

1. Locate the specific tag you want to remove.
2. Click on the "Remove" button next to the tag.
3. Confirm the removal when prompted.

Assigning Tags to Vendors

After creating the tags, you can assign them to vendors to group and categorize them based on specific

attributes or criteria. These tags help agency managers organize and manage vendors more efficiently.

To assign tags to a vendor:

1. Navigate to the Vendor section.
2. Select the vendor you wish to assign tags to.
3. Choose the relevant tags from the available list.
4. Save the changes.

Note: Tags are internal labels used for organizing vendors within the system. They are not visible to vendors and are meant for agency managers' reference and management purposes.

Priorities Configuration

The Priorities Configuration section allows you to manage and configure priorities that can be assigned to vendors for classification purposes. Priorities help categorize and classify vendors based on their trustworthiness, performance, and results. These priorities are internal to the agency and are not visible to vendors.

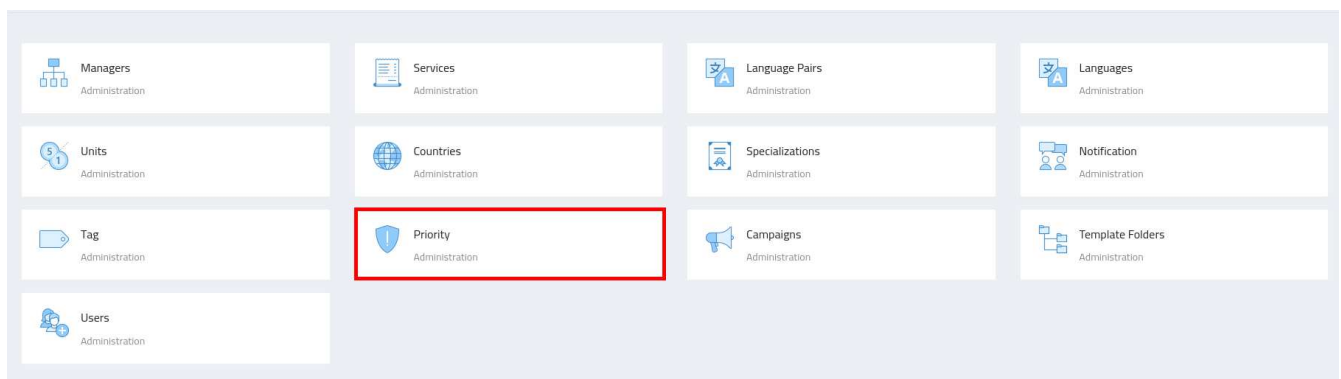


Figure 13. Admin section

Configuring Priorities

- Navigate to the admin section, where you'll find the "Priorities" configuration.

← PRIORITIES (2) List

search text

Actives

Name	Description	Status	Action
P0	Desc P0	ENABLED	Disable Delete
P2	Desc P2	ENABLED	Disable Delete

< 1 >

Figure 14. List of available Priorities

Adding a Priority

To add a new priority, follow these steps:

1. Click on the "Add Priority" button.
2. Enter the name or title of the priority.
3. Set any additional attributes or criteria for the priority.
4. Save the priority.

Editing a Priority

To edit an existing priority, follow these steps:

1. Locate the specific priority you want to modify.
2. Click on the "Edit" button next to the priority.
3. Update the name, attributes, or criteria of the priority.
4. Save the changes.

Removing a Priority

To remove a priority, follow these steps:

1. Locate the specific priority you want to remove.
2. Click on the "Remove" button next to the priority.
3. Confirm the removal when prompted.

Assigning a Priority to a Vendor

After creating the priorities, you can assign them to vendors to classify and prioritize them based on their trustworthiness and performance. These priorities help agency managers in making informed decisions when assigning vendors to jobs.

To assign a priority to a vendor:

1. Navigate to the Vendor section.
2. Select the vendor you wish to assign a priority to.
3. Choose the relevant priority from the available list.
4. Save the changes.

Note: Priorities are internal classifications used for managing and organizing vendors within the system. They are not visible to vendors and are meant for agency managers' reference and decision-making purposes.

Clients and Projects

Clients and Projects

The Clients and Projects module in Radix allows you to efficiently manage your clients, create projects, and configure prices for different services, units, and languages. This section will guide you through the process of working with clients, organizing projects, and setting up pricing based on specific criteria.

Clients

Clients in Radix represent the companies or organizations that require services from your agency. You can add, edit, and configure client profiles to ensure accurate billing and effective communication.

Name	Type	EMail	Country	Status	Action
Google	Company	joe.doe@gmail.com	United States	ENABLED	Disable Delete
Facebook	Company		United States	ENABLED	Disable Delete
GitHub	Company		United States	ENABLED	Disable Delete
Accenture	Company		Ireland	ENABLED	Disable Delete

Figure 15. List of available clients.

Adding a New Client

- Navigate to the "Clients" section within the application.
- Click on "Add New Client" to create a client profile.
- Fill in the necessary details, including the client's company name, contact information, and any specific requirements or preferences.
- Save the client's information to create their profile within the system.

Editing Client Profiles

- Locate the client you wish to edit in the list of configured clients.
- Click on the "Edit" button next to the respective client profile.

- Update the client's details as needed, such as contact information, billing preferences, or any other relevant information.
- Save the changes to update the client's profile.

Configuring Pricing for Clients

- Access the client's profile by selecting the respective client from the list.
- Navigate to the pricing section within the client's profile.
- Configure the pricing based on different criteria, such as services, units of measurement, and languages.
- Set the prices for each combination, considering factors like language pairs, service types, and units of measurement.
- Save the pricing configuration to apply the rates to the client's projects.

Notes

Remember to configure pricing for each client based on the services, units, and languages involved. This ensures accurate billing and helps you manage the profitability of each project effectively.

Projects

The Projects Management section allows you to create, edit, and remove projects associated with your clients. Projects help you organize and group client requests based on various criteria such as department, brand, or specific areas of focus.

The screenshot shows a web interface for managing projects. At the top, there is a header with a back arrow, the text 'PROJECTS (2) List', a search bar with the placeholder 'search text', and a blue 'New' button. Below the header, there is a toggle switch for 'Actives' which is currently turned on. To the right of the toggle is a settings gear icon. The main content is a table with the following columns: Code, Name, Client, Status, and Action. The table contains two rows of data:

Code	Name	Client	Status	Action
Drive	GDrive	Google	ENABLED	Disable Delete
Facebook	Expedia	Meta	ENABLED	Disable Delete

At the bottom right of the table, there is a pagination control showing '< 1 >'.

Figure 16. List of available projects.

Adding a Project

To add a new project, follow these steps:

1. Click on the "New" button.
2. Enter the project name and select the client it belongs to from the available options.
3. Provide any additional contact information for the project, such as the primary point of contact or relevant team members.
4. Save the project details.

Editing a Project

To edit an existing project, follow these steps:

1. Locate the specific project you want to modify.
2. Click on the "Edit" button next to the project.
3. Update the project name, client association, or contact information as needed.
4. Save the changes.

Removing a Project

To remove a project, follow these steps:

1. Locate the specific project you want to remove.
2. Click on the "Remove" button next to the project.
3. Confirm the removal when prompted.

Project Details

Within each project, you can access and manage various details and associated tasks. Some common project details may include:

- **Project Name:** A descriptive name that identifies the project.
- **Client Association:** The client to which the project belongs, establishing the client-project relationship.
- **Contact Information:** Relevant contact details for the project, such as the project manager, team members, or external stakeholders.

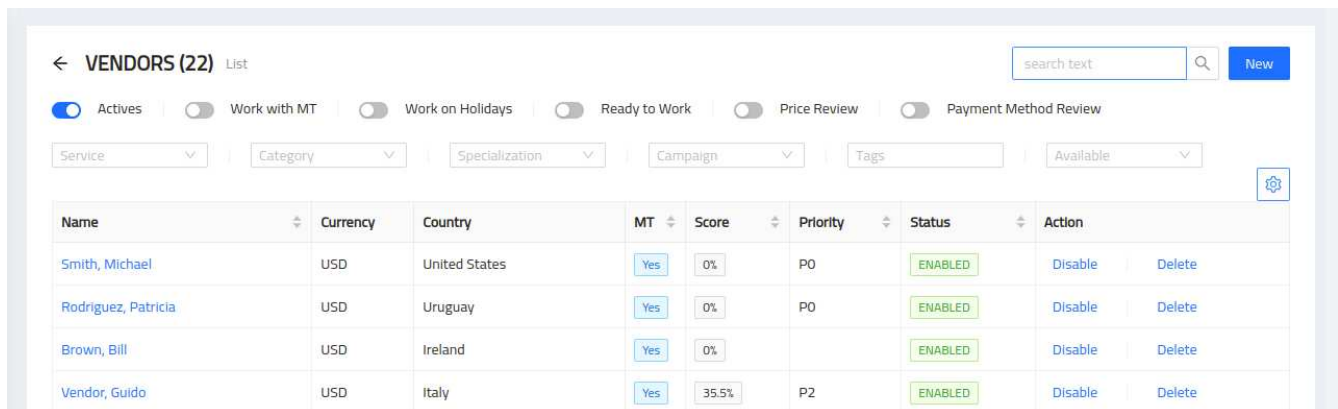
By organizing client requests into projects, you can streamline communication, establish clear points of contact, and ensure efficient management of client-related activities.

Vendors

Vendors

The Vendors module in Radix allows you to effectively manage your vendor database, providing you with the necessary information for selecting and assigning the right vendors to your translation projects. This section will guide you through the process of listing, creating, and editing vendor profiles.

Vendor Listing



Name	Currency	Country	MT	Score	Priority	Status	Action
Smith, Michael	USD	United States	Yes	0%	P0	ENABLED	Disable Delete
Rodriguez, Patricia	USD	Uruguay	Yes	0%	P0	ENABLED	Disable Delete
Brown, Bill	USD	Ireland	Yes	0%		ENABLED	Disable Delete
Vendor, Guido	USD	Italy	Yes	35.5%	P2	ENABLED	Disable Delete

Figure 17. List of available vendors

The vendor listing provides you with an overview of all the vendors associated with your agency. It allows you to access and manage their profiles efficiently.

Viewing Vendor List

- Navigate to the "Vendors" section within the application.
- Here, you will find a list of all your vendors, including their basic information and status.

Filtering and Sorting Vendors

- Utilize the filtering and sorting options provided to narrow down your vendor list based on criteria such as skills, languages, availability, or payment preferences.
- Apply the desired filters or sorting preferences to quickly find the vendors that meet your specific requirements.

Adding a New Vendor

To add a new vendor to your agency's database:

- From the vendor listing, click on "Add New Vendor."
- Fill in the required details, such as vendor name, contact information, skills, languages, and payment preferences.
- Optionally, allow the vendor to upload their CV or any relevant documents.
- Save the vendor profile to add them to your vendor database.

Editing Vendor Profiles

To edit an existing vendor's profile:

- Locate the vendor in the vendor listing and click on their name or "Edit" button.
- Update the necessary information, such as contact details, skills, languages, prices, payment methods, or vendor status.
- Save the changes to update the vendor's profile.

WARNING

Remember that the vendor module serves as a central database of information related to your vendors, ensuring that you have the necessary details to make informed decisions when assigning vendors to translation projects. Additionally, you can leverage the campaign vendor feature to manage vendors participating in specific campaigns.

Campaigns

Campaigns are a way for agencies to attract potential vendors by creating public opportunities for them to apply and upload their information. In this section, you can manage your campaigns, including creating new ones, editing existing campaigns, and removing campaigns.

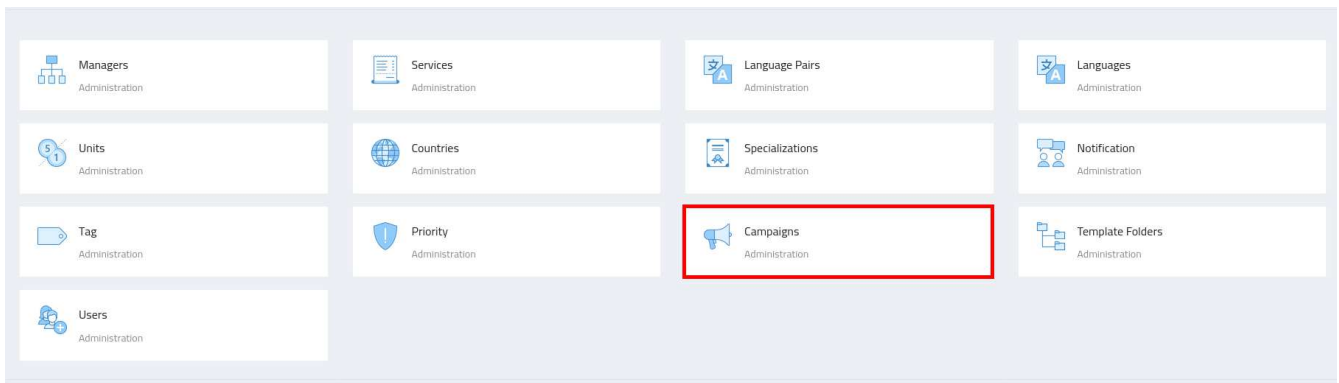


Figure 18. Admin section

Configuring Campaigns

- Navigate to the Admin section, where you'll find the "Campaigns" configuration.

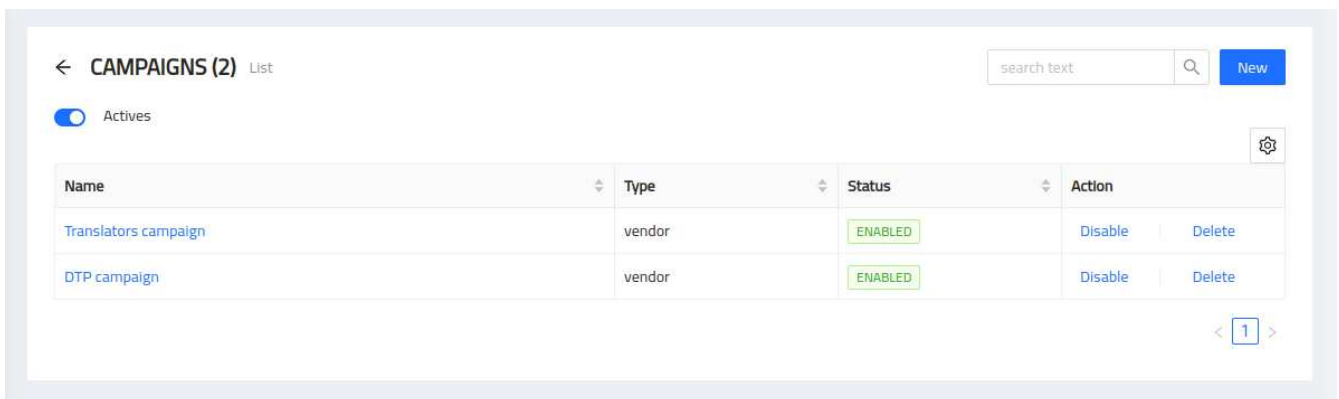


Figure 19. List of available Campaigns.

Creating a Campaign

To create a campaign, follow these steps:

1. Click on the "Create Campaign" button.
2. Enter a name for your campaign.
3. Select the allowed services for the campaign (e.g., translation, editing, proofreading).
4. Save the campaign.

Editing a Campaign

To edit a campaign, follow these steps:

1. Locate the campaign you want to edit in the list of existing campaigns.
2. Click on the "Edit" button next to the campaign.

3. Update the campaign name or modify the allowed services.
4. Save the changes.

Removing a Campaign

To remove a campaign, follow these steps:

1. Locate the campaign you want to remove in the list of existing campaigns.
2. Click on the "Remove" button next to the campaign.
3. Confirm the removal when prompted.

Sharing the Campaign

Once you have created a campaign, you can share it with potential vendors by providing them with the public link. The public link allows vendors to access the campaign page and upload their information directly.

To share the campaign:

1. Go to the campaign details page.
2. Copy the public link provided.
3. Share the link with vendors via social media, email, or any other preferred method.

Prices

Prices

Both Vendors and Clients can set their prices based on the specific service, language pair, and unit of measurement.

Setting Prices

To set prices, follow these steps:

1. Select the desired service (e.g., Translation, Review, Proofreading) for which you want to set prices.
2. Choose the language pair for which the prices will apply (e.g., English to Spanish (Spain)).
3. Specify the unit of measurement (e.g., Word, Hour) that will be used for pricing.
4. Enter the corresponding price for the selected service, language pair, and unit.
5. Save the prices.

Editing Prices

To edit prices, follow these steps:

1. Locate the specific service, language pair, and unit for which you want to modify the prices.
2. Click on the "Edit" button next to the corresponding price.
3. Update the price as needed.
4. Save the changes.

Removing Prices

To remove prices, follow these steps:

1. Locate the specific service, language pair, and unit for which you want to remove the prices.
2. Click on the "Remove" button next to the corresponding price.
3. Confirm the removal when prompted.

Applying Prices

Once the prices are set, they will be applied automatically when calculating costs for tasks, jobs, or services.

Jobs and Tasks

Job Management

The Job Management section in Radix allows managers to efficiently handle job requests, create tasks, and track the progress of each job. This section will guide you through the workflow stages, job creation process, task management, and related functionalities.

Job Creation

To create a new job in Radix, managers follow these steps:

- Receive a job request, typically via email, from a client.
- Access the application and navigate to the "New Job" section.
- Fill in the necessary details for the job, including the associated project, client deadline, manager in charge, and a name for the job.
- Save the job to create a record within the system.

Task Management

Tasks are the individual components that make up a job. Each task represents a specific service and is measured using a particular unit. Managers can create one or more tasks within a job based on the requirements.

Creating a Task

- Within the job details, click on "Add New Task" to create a task associated with the job.
- Specify the name of the task, select the service type (e.g., Translation, DTP, Review, LSO, etc.), choose the appropriate unit of measurement (e.g., word, hour, page), and enter the quantity of units required for the task.
- Set a deadline for the task, ensuring it aligns with the overall client deadline.
- Optionally, mark the task as "Free of charge" if it is not billable to the client.
- Save the task to include it in the job.

Managing Tasks

- Access the job details and locate the task you want to manage.

- Edit the task to make changes such as adjusting the quantity of units, updating the deadline, or marking it as billable or non-billable.
- Save the changes to update the task within the job.

Workflow Stages

Jobs in Radix go through several workflow stages, allowing you to track their progress and ensure timely completion.

The following workflow stages are available:

- **Created:** The initial stage when a manager creates a job.
- **In Progress:** The job is in progress, and tasks are being assigned to vendors.
- **Assigned:** Each task within the job has been assigned to a vendor for completion.
- **Delivery:** All tasks within the job have been completed, and the final deliverables are being prepared.

Job Details

Within each job, you will find various details and functionalities that facilitate effective management and tracking.

Files

- Upload relevant files associated with the job, such as source documents, reference materials, or completed translations.
- Access and manage the files within the job to ensure easy retrieval and organization.

Client Finances

- Calculate the price to charge the client for each task based on the pricing configuration set for the client.
- Track and manage the pricing details within the job to ensure accurate billing.

Vendor Finances

- Calculate the prices to pay vendors for each task based on the vendor rates specified in their profiles.
- Keep track of the vendor payments within the job to facilitate timely and accurate payments.

QA Score

- Assign a quality assurance (QA) score to the job to evaluate the overall quality of the completed tasks.
- Use the QA score to monitor and improve the translation and localization processes.

Financial Management

Financial Management - Vendor

In Radix, we prioritize smooth financial transactions with our vendors. Our comprehensive financial management system allows you to manage purchase orders, invoices, and payment receipts efficiently. Here's how you can effectively handle your financial interactions with vendors using our platform.

Purchase Order Creation

Once the finance manager identifies unpaid tasks assigned to a vendor, they can initiate the creation of a purchase order. The purchase order captures the details of the unpaid tasks and serves as an official document outlining the work to be performed and the agreed-upon payment terms.

Vendor Acceptance of Purchase Orders

Upon creation, the purchase order is sent to the vendor for review. The vendor has the opportunity to accept or reject the purchase order. If any discrepancies or errors are found, the vendor can communicate with the finance manager to resolve the issue before accepting the purchase order.

Invoice Management

After accepting the purchase order, the vendor is responsible for generating an invoice corresponding to the agreed-upon tasks and payment terms. The vendor uploads the invoice within Radix, ensuring accuracy and transparency in the invoicing process.

Invoice Verification and Payment Processing

The finance manager reviews the uploaded invoice to ensure its correctness. If the invoice meets the necessary requirements, the finance manager proceeds with the payment process. This typically involves initiating a bank transfer or processing the payment through the designated payment gateway.

Payment Receipt Upload

Once the payment is made, the finance manager uploads the payment receipt within Radix. This payment receipt serves as proof of the completed transaction and is made available to the vendor for their records.

By seamlessly managing purchase orders, invoices, and payment receipts within our platform, Radix simplifies

and streamlines the financial interactions between your agency and vendors.

Financial Management - Client

In Radix, we provide a comprehensive financial management system to streamline your invoicing process and track the payment status of jobs. With our intuitive interface, you can easily create invoices for your clients and manage their payment records.

Unpaid Jobs and Invoicing

The financial management module allows you to generate invoices based on unpaid jobs that have been successfully delivered to your clients. You can filter the jobs by a specific date range to view all the unpaid jobs within that period.

Once you have identified the unpaid jobs, you can initiate the invoice creation process. The system automatically populates the invoice with the relevant job details, including job names, project information, and the client's deadline. This ensures accuracy and efficiency in the invoice generation process.

Invoice Generation and Download

After selecting the unpaid jobs for invoicing, you can generate the invoice and customize it as needed. The system provides options to include your agency's branding, such as your logo and contact information, to maintain a professional and consistent appearance.

Once the invoice is finalized, you can download it in a PDF format. This allows you to easily share the invoice with your client through email or other communication channels.

Payment Status Management

Upon sending the invoice to your client, the payment status of the associated jobs is updated accordingly. The system marks the jobs as paid once the client accepts the invoice and completes the payment.

By tracking the payment status within Radix, you can efficiently manage and monitor the financial transactions associated with each job. This provides a clear overview of the payment history and enables you to stay organized in your financial management processes.

Dashboard

Dashboard

The dashboard in Radix serves as the main page of the application, providing managers with a consolidated view of essential information for their daily use. It offers a quick snapshot of various key metrics and activities within your translation agency management system.

Overview

The dashboard displays the following important data:

Unassigned Tasks

The "Unassigned Tasks" section provides managers with a list of tasks that need to be assigned to a vendor. It helps ensure prompt task allocation and efficient workflow management.

Offered Tasks

The "Offered Tasks" section presents tasks that have been offered to a vendor for acceptance or rejection. Managers can track the status of offered tasks and take appropriate actions based on vendor responses.

Jobs in Progress

The "Jobs in Progress" section offers a summary of ongoing jobs within the agency. It provides visibility into the active projects, allowing managers to monitor progress and take necessary steps to ensure timely completion.

Jobs with Upcoming Client Deadlines

The "Jobs with Upcoming Client Deadlines" section highlights jobs that have approaching client deadlines. Managers can prioritize these tasks and allocate necessary resources to meet client expectations.

Filtering Capabilities

As managers have access to various pages and modules within the application, they can leverage the filtering capabilities to view data that is relevant to their specific needs. The following filters are available:

- **Manager:** Managers can filter data to view information specific to themselves, allowing for personalized workflow management.

- **Clients:** Managers can filter data based on clients to focus on specific client-related activities and projects.
- **Projects:** Filtering by projects enables managers to narrow down their view and concentrate on specific project-related tasks and progress.

These filtering capabilities empower managers to streamline their workflow, view data that matters most to them, and efficiently manage their translation agency operations.

Reports

Reports

Radix offers a powerful reporting module that allows you to export data in Excel format for various entities and time ranges. Additionally, you can gain valuable insights and track the performance of your agency using built-in statistics. Let's explore the reporting capabilities of Radix:

Data Export

Jobs between Specific Date Range

Export a comprehensive list of jobs completed within a specified date range. This report provides a detailed overview of the jobs, including associated clients, projects, tasks, assigned vendors, and other relevant details.

Vendors

Export a vendor report that includes information about your vendors, such as their names, contact details, skills, rates, and performance metrics. This report helps you manage and evaluate your vendor relationships effectively.

Clients

Generate a report containing client-related data, including client names, contact information, project details, and financial records. This report provides insights into your client base and aids in tracking their engagement and financial interactions.

Purchase Orders between a Range of Dates

Export a report that summarizes the purchase orders created within a specified date range. This report captures the purchase order details, including vendor information, tasks, payment terms, and associated jobs or projects.

Invoices between a Range of Dates

Export an invoice report that encompasses all invoices generated during a specific time period. This report includes invoice details, client information, services rendered, payment status, and associated jobs or tasks.

Payments between a Range of Dates

Generate a report that outlines the payments made to vendors within a specified date range. This report helps

you track and manage financial transactions with vendors, including payment amounts, dates, and associated purchase orders or invoices.

QAs between a Range of Dates

Export a report that showcases the quality assurance (QA) activities conducted within a particular time frame. This report includes QA scores, associated jobs or tasks, vendor performance metrics, and any additional QA-related information.

Statistics

Monthly Job, Project, and Task Count

View statistics on the number of jobs, projects, and tasks completed within a specific month. This data helps you understand your agency's workload and track productivity trends over time.

Monthly Evolution

Track the evolution of key performance metrics, such as job count, revenue, and client engagement, across different months. These statistics provide valuable insights into your agency's growth and performance.

Vendor QA Score Evolution

Monitor the evolution of a vendor's QA scores over time. This statistic helps assess vendor performance and identify trends in quality assurance.

Configuration

Notifications and Communication

Effective communication and timely notifications are crucial for efficient collaboration within your agency. Radix provides a comprehensive set of notification groups, each tailored to the roles and responsibilities of different agency managers. These notifications can be configured to suit your agency's requirements, allowing you to stay informed and connected throughout the translation and localization process.

Name	TO/CC	CCO	Description
Admin Manager			Groups of notifications and reminders associa...
Vendor Manager	managers-list@radixtool.com		Groups of notifications and reminders associa...
Client Manager			Groups of notifications and reminders associa...
Project Manager	pm-list@radixtool.com		Groups of notifications and reminders associa...
Finance Manager	bill@radixtool.com		Groups of notifications and reminders associa...
QA Manager	qa-list@radixtool.com		Groups of notifications and reminders associa...

Notification Groups

Admin Manager

The "Admin Manager" notification group is responsible for access invitations to use the application. This group ensures that new users are onboarded smoothly and have the necessary access privileges within Radix.

Vendor Manager

The "Vendor Manager" notification group notifies users about price changes. It keeps the vendor manager informed about any updates or modifications to vendor pricing, enabling effective management of vendor relationships.

Client Manager

Project Manager

The "Project Manager" notification group is essential for task and job management. It includes notifications for

task offers, task acceptances, task rejections, overdue jobs, and jobs approaching their deadlines. These notifications ensure project managers have real-time updates on task progress and job statuses.

Finance Manager

The "Finance Manager" notification group focuses on finance-related activities. It includes notifications for purchase order additions, purchase order acceptances, invoice additions, vendor payment method changes, invoice acceptances, and payment receipt additions. These notifications help finance managers stay informed about financial transactions and manage vendor payments effectively.

QA Manager

The "QA Manager" notification group is dedicated to quality assurance activities. It includes notifications for new QA additions and QA acceptances. These notifications keep QA managers informed about the progress and status of quality assurance tasks.

Configuration Options

For each notification group, Radix offers a range of configuration options to customize the notification settings according to your agency's needs:

- **CC and BCC Recipients:** You can specify additional recipients, such as team members or stakeholders, to receive carbon copies (CC) or blind carbon copies (BCC) of the notifications.
- **Subject and Body Templates:** Customize the subject lines and body templates of the notification emails to match your agency's preferred style and tone.
- **Notification Enable/Disable:** Enable or disable specific notifications within each group based on the relevance and importance to your agency's workflow.

These configuration options allow you to fine-tune the notification system, ensuring that managers receive the right information at the right time and through the appropriate communication channels.

Settings and Customization

In Radix, we understand the importance of customization to align the application with your agency's branding and preferences. The "Settings and Customization" section provides a range of options for tailoring the system to your needs.

Theme Customization

With Radix, you have the flexibility to customize the theme colors to match your agency's visual identity. This allows you to create a consistent and branded user experience for both your managers and vendors.

Agency Data Configuration

Configure your agency's data, such as the brand name and logo, to personalize the system. By adding your agency's branding elements, you create a professional and cohesive look throughout the application.

Working Hours Configuration

Customize the working hours of your agency within the system. This information is utilized to calculate metrics, such as response times for jobs, enabling you to analyze and improve your agency's efficiency and performance.

SMTP Configuration

Use your custom Simple Mail Transfer Protocol (SMTP) settings to send emails from within Radix. By integrating your preferred SMTP provider, you can ensure that email communication with your clients and vendors is seamless and aligned with your agency's email infrastructure.

Storage Configuration

- [Option 1: Hosted Storage] Radix provides built-in hosting for your data, ensuring secure and reliable storage for your files and documents. Your data is safeguarded and readily accessible within the application.
- [Option 2: S3 Provider Integration] Alternatively, you can integrate Radix with your preferred Amazon S3 or other compatible storage provider. This allows you to leverage your existing storage infrastructure while benefiting from the features and functionalities of our application.

Vendor Access Portal

Vendor Access Portal

The vendor access portal provides vendors with a streamlined view of relevant information and functionality within Radix. Here's what vendors can do within their access portal:

Task Management

Vendors can view the tasks assigned to them by the agency. They have the ability to download associated files, review task details, and make informed decisions regarding task acceptance or rejection. Vendors can mark their assigned tasks as complete, ensuring clear communication and progress tracking.

Quality Assurance (QA)

Vendors can access and review their own quality assurance (QA) evaluations. They can view QA scores, feedback, and any additional details related to the evaluation. This feature allows vendors to monitor their performance and make necessary improvements.

Purchase Orders (POs) and Invoices

Vendors can access their purchase orders (POs) and review the details associated with each PO. They have the ability to accept or reject a PO if needed. Additionally, vendors can upload invoices related to the accepted POs, ensuring smooth invoicing processes and transparent financial transactions.

Payments

Vendors can view their payment history and track the status of their payments. They can review payment details, such as payment amounts, dates, and associated POs or invoices. This functionality allows vendors to stay informed about their financial interactions with the agency.

Vendor Profile Management

Vendors have the ability to manage their own profile information. They can update their personal details, request price changes for their services, request changes to their preferred payment methods, and set their working hours and availability, including holidays. This feature ensures that vendor information remains up to date and aligned with their individual preferences and requirements.

Please note that the vendor access portal offers a restricted view and functionality compared to the main system used by managers. The focus is on providing vendors with the necessary tools to manage their assigned tasks, invoicing, payments, and profile information efficiently.

Glossary

To help you familiarize yourself with the key concepts used in Radix, we have compiled a glossary of important terms and their definitions.

- **Service:** A specific type of work or task provided by the agency, such as translation, review, linguistic sign-off (LSO), desktop publishing (DTP), and more.
- **Unit:** The measurement used to quantify the work or task performed for a service. Examples include words, hours, pages, etc.
- **Client:** A company or organization that requests services from the agency. Clients submit jobs or projects to be completed, specifying their requirements and deadlines.
- **Project:** A grouping mechanism used to organize and manage related jobs for a specific client. Projects allow you to categorize and track tasks associated with a particular client's requirements.
- **Vendor:** An individual or external entity that provides services to the agency. Vendors possess specific skills and expertise and are assigned tasks or jobs to complete based on their capabilities.
- **Purchase Order:** A document created by the finance manager to initiate and record the agreement between the agency and a vendor for the performance of specific tasks. The purchase order outlines the work to be completed and the agreed-upon payment terms.
- **Invoice:** A document generated by a vendor to request payment from the agency for services rendered. The invoice includes details such as the services provided, associated costs, and payment terms.
- **QA:** Abbreviation for Quality Assurance. In the context of Radix, QA refers to the process of reviewing and ensuring the accuracy and quality of completed tasks or jobs.

These are just a few of the key terms used within Radix. If you come across any other unfamiliar terms while using the application, please refer to this glossary for clarification.