AcudocX

SCAN | SELECT | TRANSLATE | CERTIFY

PROVIDER HANDBOOK

Version 08.10.21

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WELCOME

AcudocX's software-as-a-service (SAAS) platform aims to provide seamless translation services between freelancers, LSPs and customers. To facilitate an efficient system, translators act as editors or quality controllers of translation jobs – adding or editing translation fields that are provided by the customer. The translator is able to set a starting fee and may charge for edits when the customer has left fields empty or incorrectly entered details. This enables a quick, efficient and fair system for both translators and customers.

This handbook will provide you with all the necessary steps and functions to using AcudocX's platform.

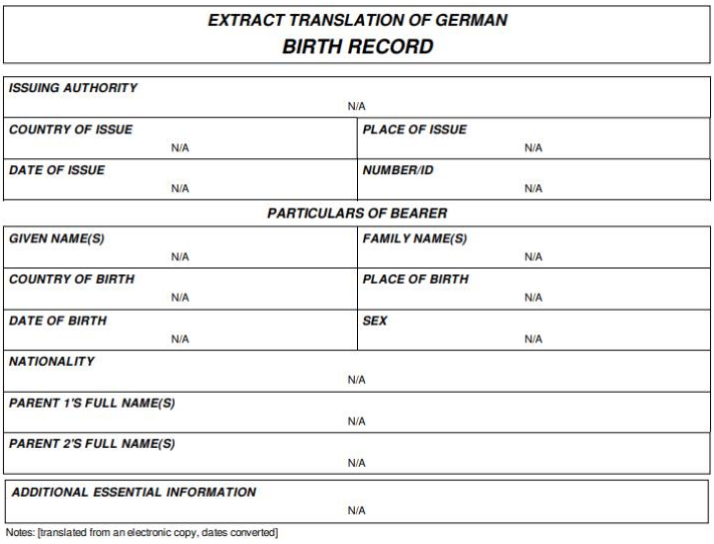
A note on our system's available document templates:

AcudocX offers to customers extract translations or full translations.

Extract translations are prepared in a similar way to full translations; however, any information that is considered non-essential to the purpose of the translation is often omitted from the final translated document.

AcudocX's extract template options have all been sourced from available AUSIT templates, although are customised to a degree in order to meet the specific document requirements of each language.

If you are not familiar with extract translations, we recommend you familiarise yourself with some extract template examples available in your certified language/s before you begin accepting translation jobs. Some examples of final extract exports on AcudocX are shown below.



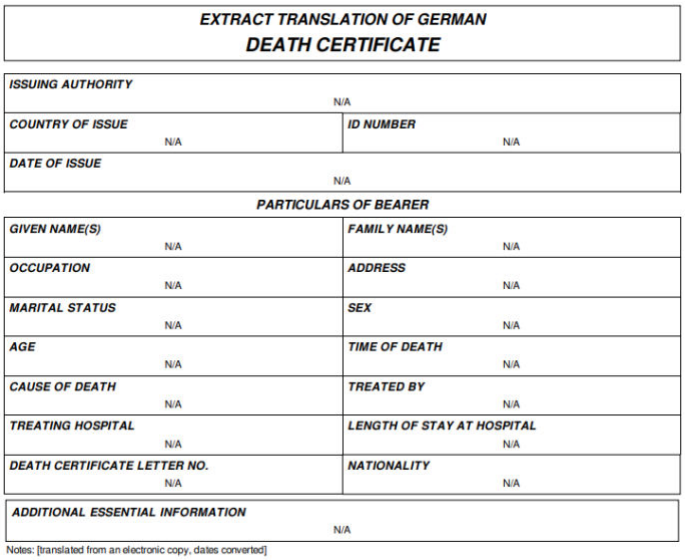
EXTRACT TRANSLATION OF GERMAN
BIRTH RECORD

ISSUING AUTHORITY: N/A	
COUNTRY OF ISSUE: N/A	PLACE OF ISSUE: N/A
DATE OF ISSUE: N/A	NUMBER/ID: N/A

PARTICULARS OF BEARER

GIVEN NAME(S): N/A	FAMILY NAME(S): N/A
COUNTRY OF BIRTH: N/A	PLACE OF BIRTH: N/A
DATE OF BIRTH: N/A	SEX: N/A
NATIONALITY: N/A	
PARENT 1'S FULL NAME(S): N/A	
PARENT 2'S FULL NAME(S): N/A	
ADDITIONAL ESSENTIAL INFORMATION: N/A	

Notes: [translated from an electronic copy, dates converted]



EXTRACT TRANSLATION OF GERMAN
DEATH CERTIFICATE

ISSUING AUTHORITY: N/A	
COUNTRY OF ISSUE: N/A	ID NUMBER: N/A
DATE OF ISSUE: N/A	

PARTICULARS OF BEARER

GIVEN NAME(S): N/A	FAMILY NAME(S): N/A
OCCUPATION: N/A	ADDRESS: N/A
MARITAL STATUS: N/A	SEX: N/A
AGE: N/A	TIME OF DEATH: N/A
CAUSE OF DEATH: N/A	TREATED BY: N/A
TREATING HOSPITAL: N/A	LENGTH OF STAY AT HOSPITAL: N/A
DEATH CERTIFICATE LETTER NO.: N/A	NATIONALITY: N/A
ADDITIONAL ESSENTIAL INFORMATION: N/A	

Notes: [translated from an electronic copy, dates converted]

BECOMING A PROVIDER

If you are interested in becoming a provider with AcudocX, please fill in the following details on this Google form: click here! and we will sign you up.

Full name
ABN
NAATI credentials (language(s), certification number & expiry date)
NAATI stamp (signed and scanned with exact measurement of 610px x 480px. Please leave date field empty)
Accounting details (Name, BSB, Account Number)
Email address
Mobile number
Address
Short description about yourself as a NAATI-certified translator
Long description about yourself as a NAATI-certified translator

Providers: Once our admin team has completed your sign up, you will receive a username and password to log in.

1. Go to https://app.acudocx.com.au/provider

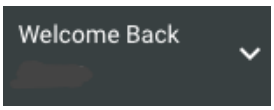
2. Log in with your provided email and password.

3. Set up two-factor authentication by scanning the QR code on screen with Google Authenticator or a similar app. You will be required to enter in your code upon each log-in.

To begin using your account, please scan this QR code with Google Authenticator (or a similar app).

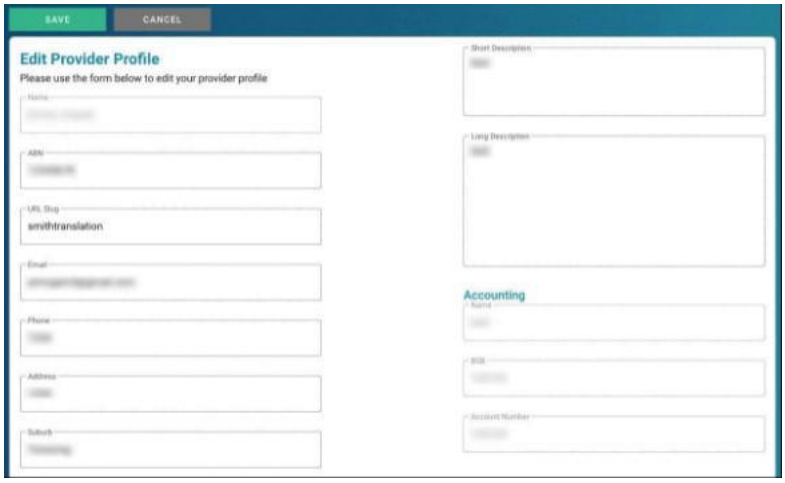
Enter the code in the field below to set up two-factor authentication.

4. Under the top-right drop-down arrow, click '**Provider Profile'**



This is where you can view and change all your provider information, upload your logo and banner, and where you see your stamp.

5. Select **EDIT** and fill in your details. You can update these fields at any time.



Please fill in every field in the Provider Profile. All fields including GST registry must be filled out and your logo and banner uploaded in order for the system to recognise you as a provider.

The banner will be visible on the top left-hand corner in the letterhead of all your exported translations, and your logo on the bottom right. If you don't have a banner or logo, we suggest for you to upload an image of your name in text or a blank white image instead.

6. Begin using the AcudocX system.

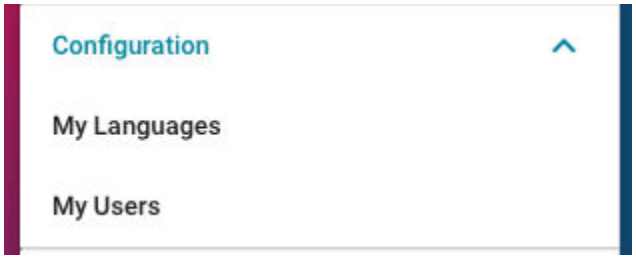
SETTING UP BEFORE YOU BEGIN

Welcome to AcudocX.

Now that you are officially one of our providers, please read this handbook before you begin using our AcudocX services.

As a provider, it is important that you set up your configuration accurately using the navigation menu on the left. Under **Configuration**, please set up your pricing structures for your languages and the extract templates you will offer – see the steps in the following pages.

Once these are completed, you can begin receiving translation jobs and use the other services available on the platform.



SET YOUR PRICE & TEMPLATES

Setting your pricing

You must set pricing structures for your language(s). If you choose to offer them, you will need to set pricing for:

- Extract templates and,
- Full document translations.

Extract templates allows you to set:

- default pricing (applies to all templates of your language) and,
- custom pricing for a [a specific price for a template you will offer].

There are two types of extract templates. A **self-service extract** and a **standard extract .**

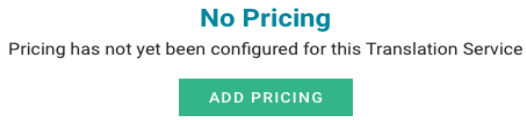
A **self-service extract** is a time-efficient service for providers. Your customers will complete part of the translation process: first uploading their documents, then selecting and translating the fields, before it is sent to you for review.

A **standard extract** only requires customers to submit their documents through the system before it is sent to you to translate and complete within AcudocX.

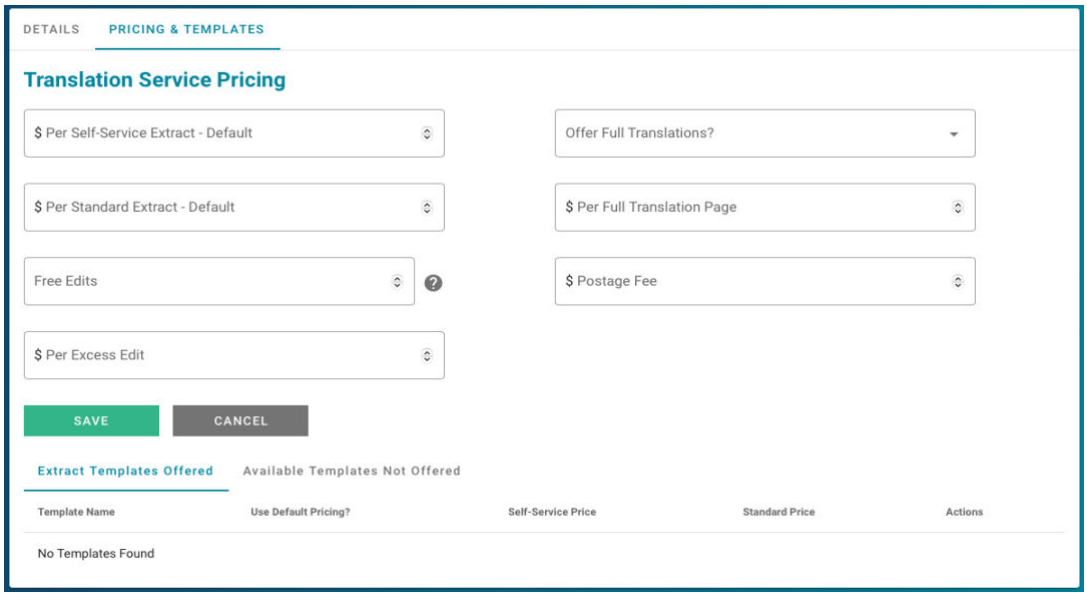
All providers must set their own pricing within the system. Please note AcudocX has no control over the price of translations other than implementing a $10 minimum for the system to function.

1. Navigate to the main navigation menu (left side).
2. Under **Configuration**, select **My Languages.**
3. For your language that appears, navigate to the right drop down arrow and select **View**.

4. Select the tab called **Pricing & Templates** then choose **ADD PRICING.**



5. Fill in your pricing details, then select **SAVE.** You must fill in your extract default prices here before you can set custom extract prices (see section below)



**what are free edits? These free edits apply to self-service extract templates. Edits are any corrections you make to a customer's translation field, or additional translations you add yourself. After your set free edit quota has been reached, the system will charge the customer for each additional edit you make, charging the 'excess edit' fee you set. However, you can prevent the system from doing so by deselecting the 'charge' tickbox when completing a translation job.*

6. To edit your pricing details at any time, select the pen icon next to **Translation Service Pricing.** (This icon will appear once you have entered in your details)

If you are certified in more than one language, repeat the above steps to configure pricing for additional languages.

*For custom template pricing, continue reading **Setting your templates** below.

*Pricing for each document template is locked when the job is created**, meaning any pricing changes will not apply to jobs that have already been created** (i.e., if the job is in customer draft mode, or already accepted by the translator).*

*Pricing changes will apply to all new jobs and **reactivated jobs.** Reactivated jobs are draft jobs started by the customer but have expired after a certain date. To reactivate the job, the customer agrees to any pricing changes*

Setting your extract templates

After you have configured your pricing, please select which templates you will offer.

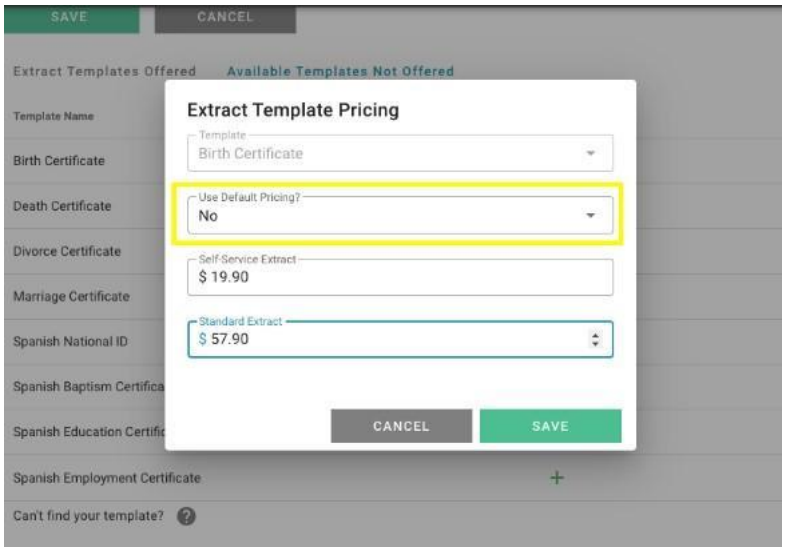
1. After setting pricing for your language, navigate to the **Pricing & Templates** tab.

2. The tab called **Extract Templates Offered** contains all available templates for your language.

For each template you do not wish to offer, click the red bin icon and it will be moved to the tab **Available Templates Not Offered.** You can remove templates and add them back to your offered list at any time.

Template Name	Use Default Pricing?	Self-Service Price	Standard Price	Actions
Birth Certificate	Yes	$10.00	$18.00	
Death Certificate	Yes	$10.00	$18.00	
Family Name Change	Yes	$10.00	$18.00	

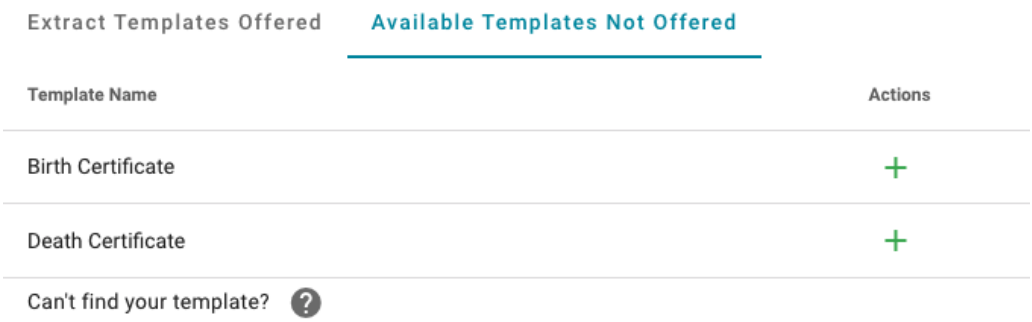
If you would like a specific template to have custom pricing, select the green pen icon and choose 'No' under **Use Default Pricing?** then enter new details. Custom prices will apply to the selected template only. (prices can be adjusted at any time)



3. Press **SAVE.**

4. Repeat steps for each template you wish to offer custom pricing.

You can add a template to your offered list again by pressing the green plus icon.



Requesting to add a new template

If you wish to offer a template not currently available on the system, we are able to add or make minor formatting changes to a template unique to your provider account.
Please send an email to our AcudocX support team at admin@acudocx.com.au to request a new template giving as much detail as possible, including:

- Name of the extract template
- Name of the extract template your customers will see
- A copy of your document format (a translated document showing formatting) and,
- Relevant information fields where possible

DJHartmann Translation

Dylan J Hartmann
Address: 70 McCaul Street
Taringa QLD 4068
ABN: 4302 729 0635

EXTRACT TRANSLATION OF THAI
BIRTH CERTIFICATE

ISSUING AUTHORITY	
	ss
COUNTRY OF ISSUE	PLACE OF ISSUE
N/A	sss
DATE OF ISSUE	BIRTH CERTIFICATE NUMBER/ID
01/04/2021	123456

PARTICULARS OF BEARER

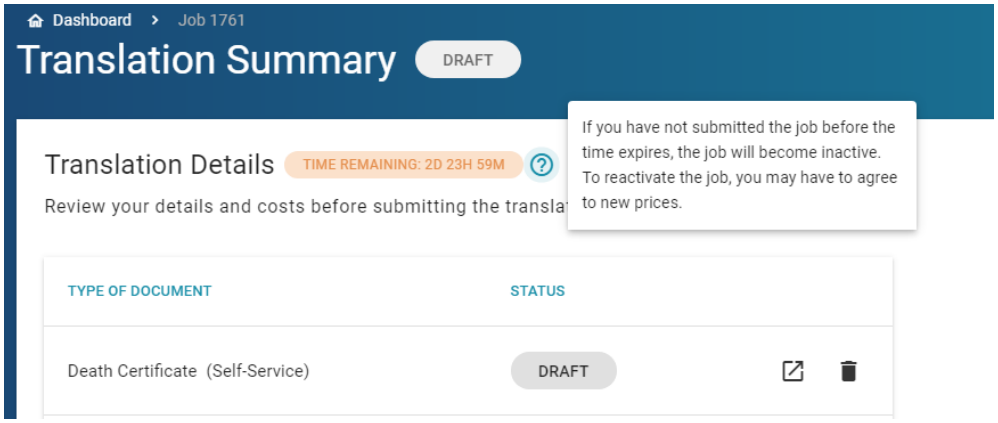
GIVEN NAME(S)	FAMILY NAME(S)
N/A	N/A
PLACE OF BIRTH	COUNTRY OF BIRTH
N/A	N/A

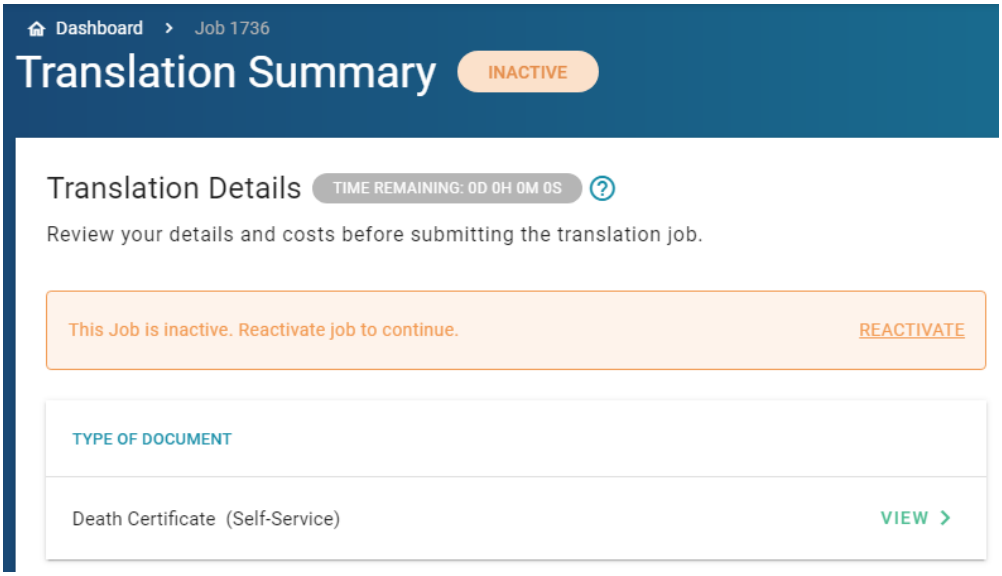
PRICING CHANGES ON DRAFT AND INACTIVE JOBS

Jobs submitted by the customer run on a **timer system.**

Draft jobs created are set to expire after 72 hours, at which point the job will become inactive, and the customer will need to reactivate the job before they can proceed with submission.

Your pricing changes will apply to all new jobs and reactivated jobs. Customers are asked to agree to any pricing changes before they are able to reactivate a job.

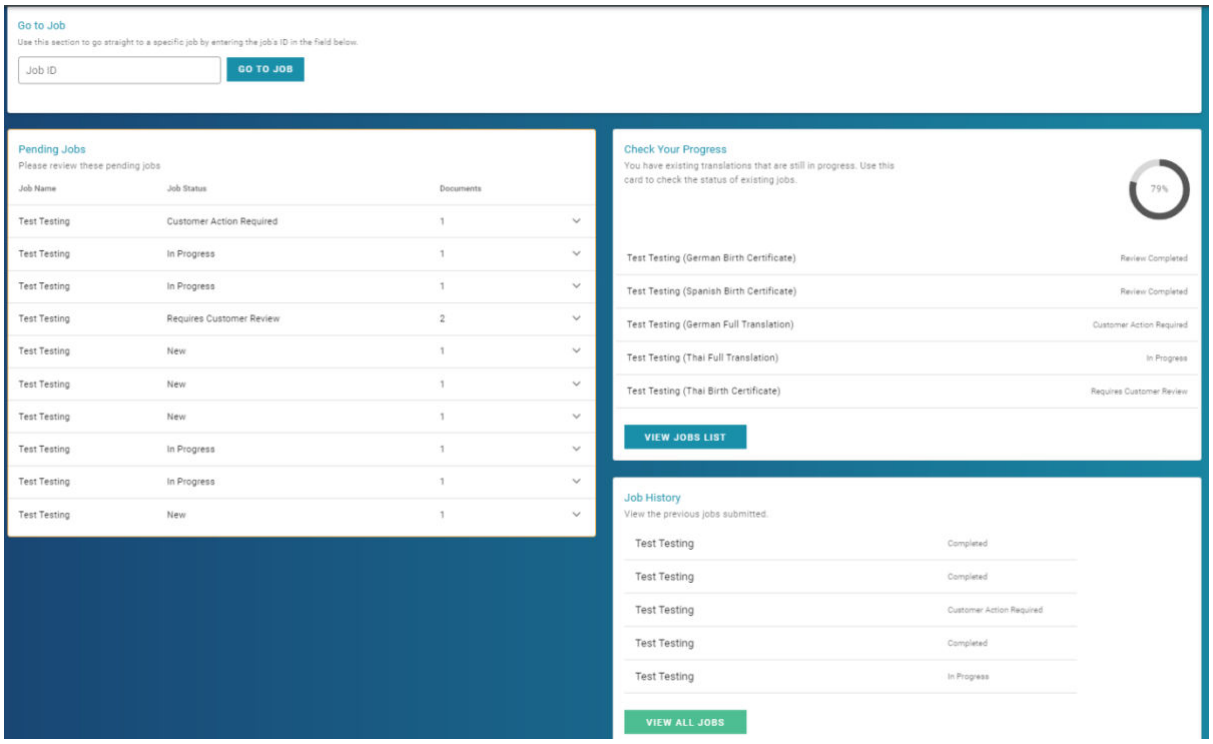




THE DASHBOARD

Once you have completed the above steps, customers will now be able to select you as a provider for service.

On the provider's dashboard, you can view 'New & Current Jobs', 'Pending Jobs', and 'Job History'.



Each category shows the following:

- The customer's name(s) and **their language of their documents**
- The number of documents submitted by that customer
- Job Status (new, in progress, etc.)

PENDING JOBS	You can view the jobs submitted by each customer and check the job status whether a job is new, requires customer review, review completed, requires customer action, in progress, or completed. You can choose to accept the job, or in the situation that you are unable to take the job, refund the customer and abandon the job. When checking a translation job, if you make any edits, the job is then sent back to the customer for review (otherwise you may choose to complete the job). You can also request customer action, which can occur due to a bad source copy, and hence requires a customer to resend the source document.
CHECK YOUR PROGRESS	You can view existing translation jobs that are still in progress. Once clicked into each job, you can view the details of each job as well as the cost summary. You may also edit the job details, raise an issue or abandon the job by providing reasons for taking such action.
JOB HISTORY	You may view the previous jobs submitted.

MANAGING TRANSLATION JOBS

When there is a new translation job, providers will receive an email notification with a link to view the submitted job.

New jobs also appear under the **Pending Jobs/Check Your Progress** menu

The translation process **for self-service extracts** is shown below:

AcudocX notifies the provider that a new job is waiting. → Provider accepts translation job

A provider reviews, edits, and completes the translation job. The certified document is sent back to the customer for download.

If the provider makes any edits or changes, the job is passed back to the customer for review and additional payment, if required.

If required, the documents can also be printed, stamped, and signed with ink & sent via post.

During these processes, if there is any issue with the translation job, a customer or provider can **directly message** each other or use the button ***RAISE AN ISSUE*** to submit further details, which is then sent to the system administrators for further clarification and action. Additionally, the provider can use the button ***CUSTOMER ACTION REQUIRED*** for requests from the customer, such as a new source document.

AcudocX notifies the provider that a new job is waiting. → Abandon translation Job

If a provider cannot take a job, they are to abandon the job. In this situation, the provider will be required to report their reason for abandoning the job. The customer's job will then enter the unassigned jobs pool and can be claimed by other active providers. Please read the **Refund** section below for details.

EDITING TRANSLATION JOBS: SELF-SERVICE EXTRACT

To accept the job, select **START JOB** and navigate to the corresponding template tab (in this case, **BIRTH CERTIFICATE Self-Service Extract**)

Before you start editing:

On self-service extracts, if you notice your customer has not made any translations (if all translation fields are left blank) we recommend you send a message to the customer to check if they have intentionally left fields blank or are unaware that they are required to enter their own translations. Please also ensure your customer is aware they may be required to pay for any additional charges for extra translation edits you make.

Select **START JOB**, then choose **CUSTOMER ACTION REQUIRED** and select *'empty translation fields'*, as shown in step 4 below. The suggested message below can be put in the optional message space.

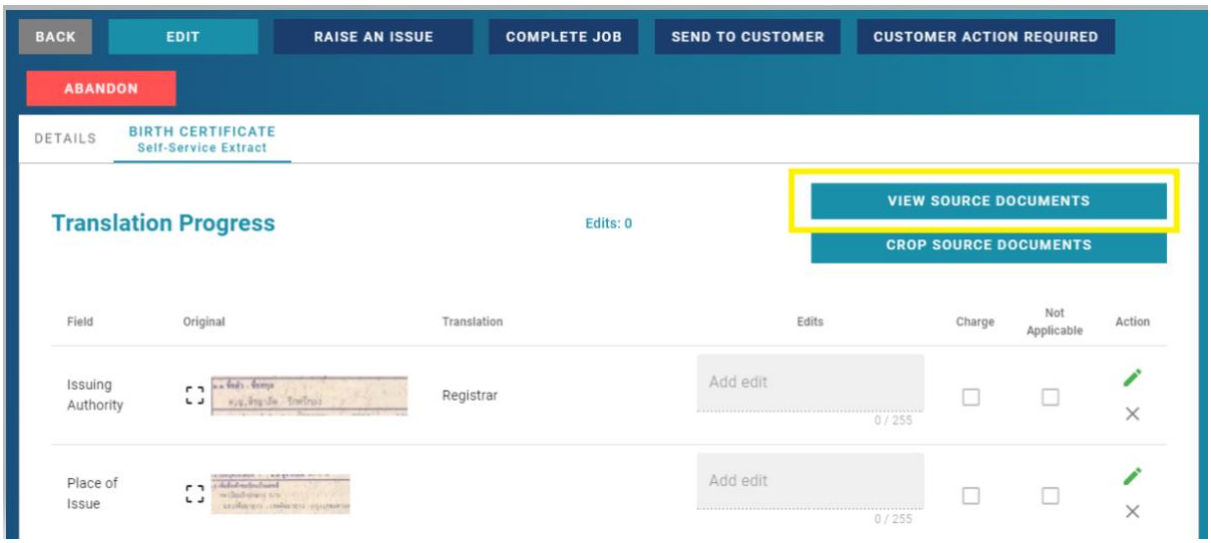
A suggested message to send is:

> *Hi! Thank you for submitting your translation via AcudocX.*
> *To avoid any additional charges, would you kindly enter as much of the required information into the translation fields as you can. When you're ready, please click 'return to provider' and I'll be able to complete the job for you.*
> *Best regards,*
> *XXXX*

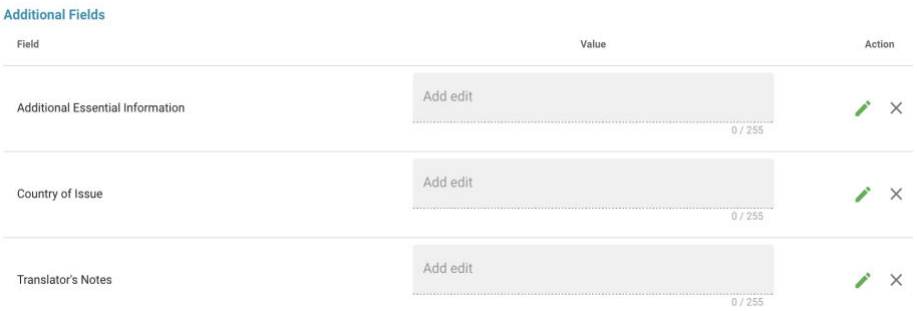
Once you accept a job, you can begin **reviewing** and **editing** the job by following these steps:

1. Check the accuracy of the translation input completed by the customer with the corresponding source fields.

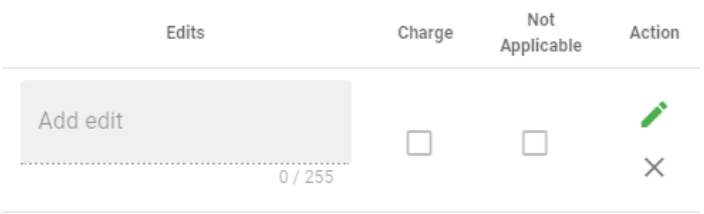
Don't forget to check if your customer has selected **postage**. Our recommendation is to write the customer's name on a new postage envelope before beginning the job, to avoid overlooking postage once job is completed.



- View source documents
- Check if all relevant fields are present in the source document
- Check if the customer's included translations are accurate under the column called **Translation**.
- Additional information can be added to the **Additional Essential Information** field, along with translator's notes and country of issue.



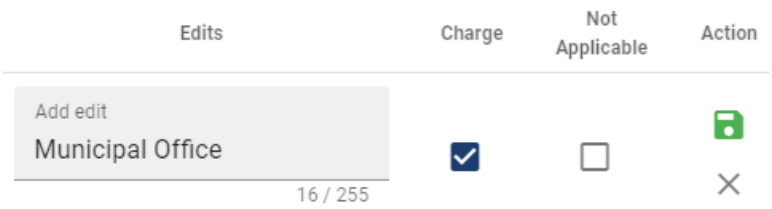
2. If required, you can add in a correction for any incorrect or missing translations:



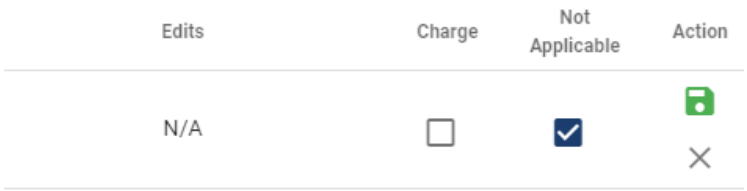
- Press the green pen icon to enter a correction. Type in your edit.
- Press the **green save icon** after entering your edit. <u>Please always ensure to select save afterwards for every edit you make.</u>

3. You can set a number of free included edits for each translation.

- You can also decide whether to charge for each edit made by ticking the 'Charge' box.

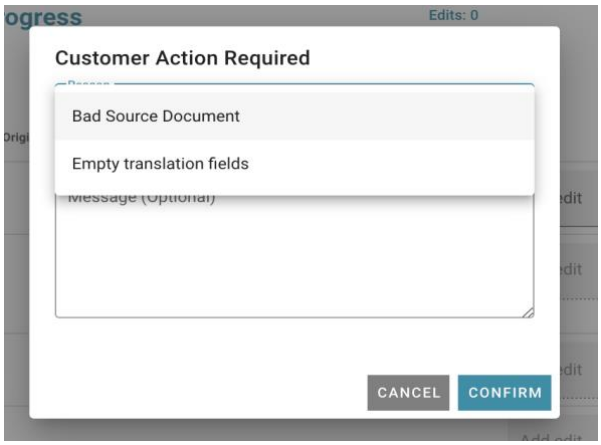


- If a field is not applicable for the template, tick the box 'Not Applicable' and all text will be overridden and replaced with N/A on the final document export.



- A customer must pay for any edits exceeding your number of free edits before the customer receives their final certified document.

4. If the source document is for instance, poor quality, illegible, or if you like to request the customer fill in any empty fields, click '**CUSTOMER ACTION REQUIRED'** at the top of your screen and fill in your message to the customer.

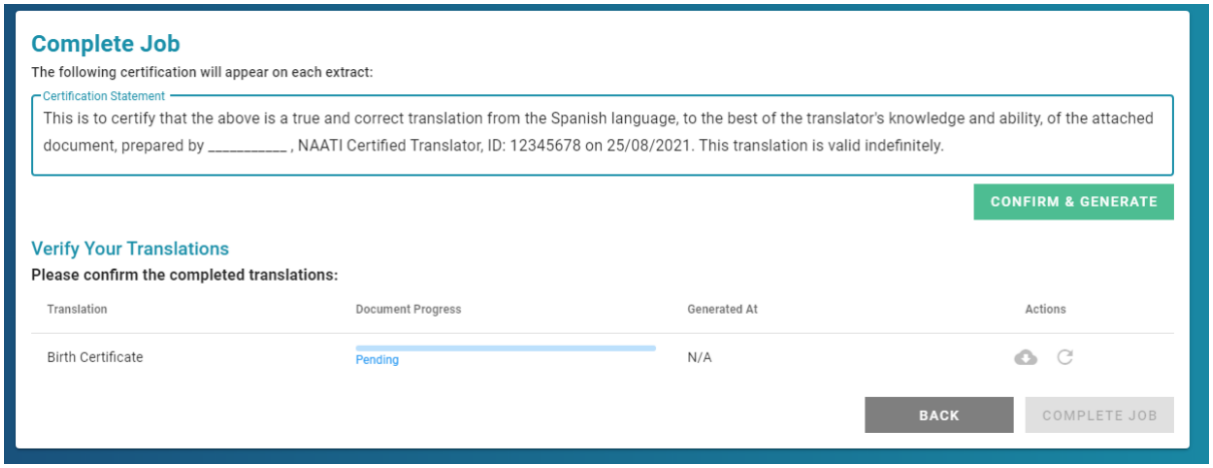


5. If there is any other issue with the translation job that requires customer's attention or action, you can either click **RAISE AN ISSUE** button (please see the **ISSUES** section) to submit further details ***OR*** you may send a personal message to the customer via the **MESSAGES** function (please see the **MESSAGES** section).

6. After you finish reviewing and editing the translation job, you should then send the job back to the customer for review by clicking **SEND TO CUSTOMER**.

Note that if you choose to charge for edits and these edits exceed your maximum specified number, you must send the job to the customer for review before you can complete the job.

7. Once the customer finishes their review, you will be able to press **COMPLETE JOB.**



8. Edit your digital certification if required, then click **CONFIRM & GENERATE.**

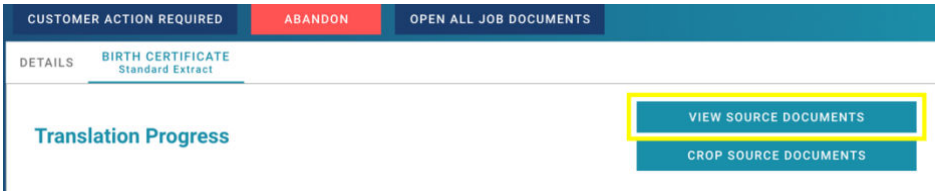
You can download the generated files if required by click the download cloud icon. Re-generate the file by clicking the reload icon.

9. Click **COMPLETE JOB** to finish and send the completed translation to the customer.

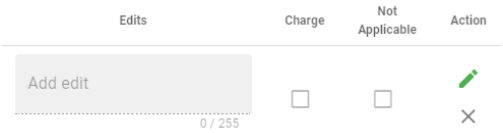
EDITING TRANSLATION JOBS: STANDARD EXTRACT

Like a self-service extract, start the job.by selecting **START JOB** then navigating to the template (**BIRTH CERTIFICATE Self-Service Extract**).

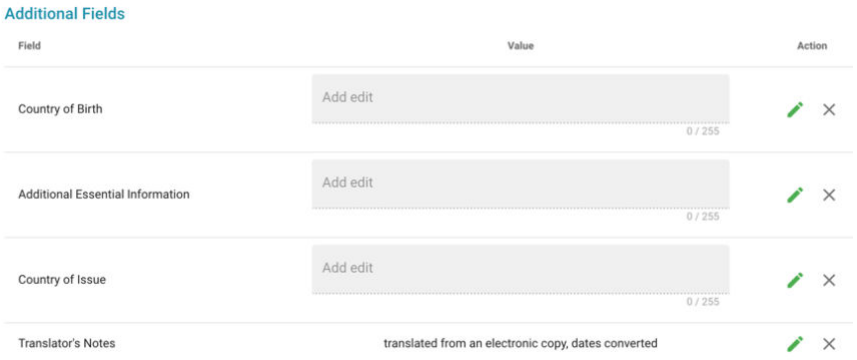
1. Select **VIEW SOURCE DOCUMENT** to check if all relevant fields are in the document.



2. Enter in the translation for each field by pressing the green pen icon for the corresponding field.

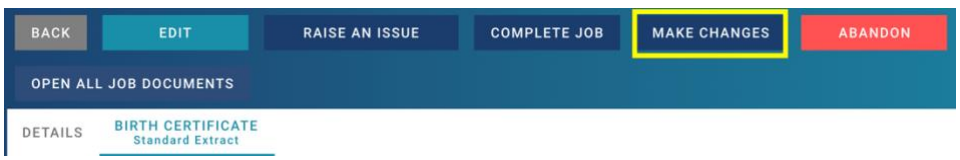


3. Enter any additional information under **ADDITIONAL FIELDS**



4. Once complete, you can choose between two steps:

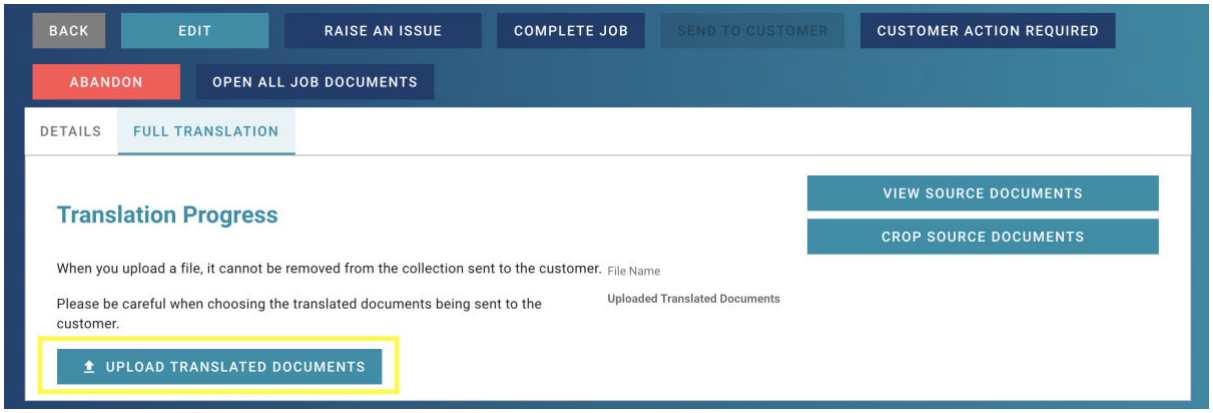
Send the job to the customer for review by pressing **SEND TO CUSTOMER**.
After the job is sent back to you, you can make additional changes by selecting **MAKE CHANGES,** otherwise choose **COMPLETE JOB,** confirm your digital certification, and send the finished job back to the customer



FULL TRANSLATIONS

A full translation job is different to extract translations:

Providers accepting this job will not make edits straight into the AcudocX system. Instead, the system allows you to upload copies of documents you have translated. For full translations, AcudocX functions like a secure file transfer platform. The customer upload each of their files as a full translation and the translator uploads the completed files for review and then completion. If the full translation document requires your NAATI stamp, you must upload a stamped version of the completed translation. The system does not yet place a signed/dated stamp on the document for full translations.



Providers will be unable to complete the job and send to customers until translated documents have been uploaded.

When uploading documents, you are not able to upload multiple files. Any uploaded file will replace the previously uploaded file and be available for you or the customer to download.

Note: *New uploaded files will replace the previously uploaded files. If a customer uploads several different translation documents together as one file, the translator should upload their translation as one file.*

Don't forget to check if customer selected postage. Our recommendation is to write the customer's name on a new postage envelope before beginning the job, to avoid overlooking postage once job is completed.

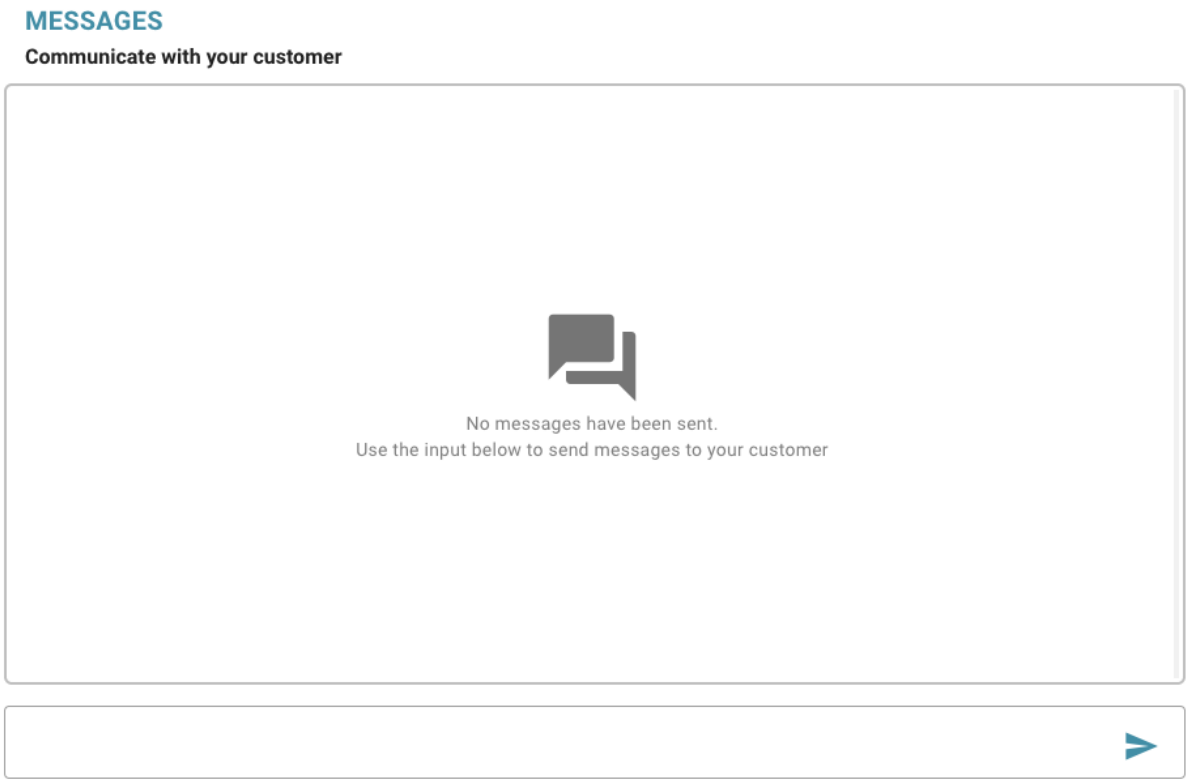
MESSAGES

Messages is a function in the AcudocX system that allows the provider and customer to communicate with each other, simply by typing in the message in the area provided.

When there is a new message, you will be notified via email and with the appearance of a message icon on your Dashboard.

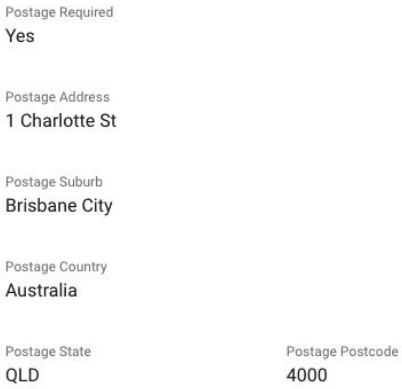
Access your messages under the **View job page**, under the **DETAILS** tab. Scroll down to the bottom of your screen.

Note: You will be unable to send messages to a customer if the job has not yet been accepted.



POSTAGE

Your customers may require a hard copy of the translation posted to them. AcudocX will show you the customer's postal address on the job screen.



Please ensure you check if postage is requested. A good tip is to fill in the address on the envelope before commencing your translation and sending the express post tracking number immediately after completing the job.

Our recommendations for postage are as follows:

Postage type: Express Post
Size: B4, large

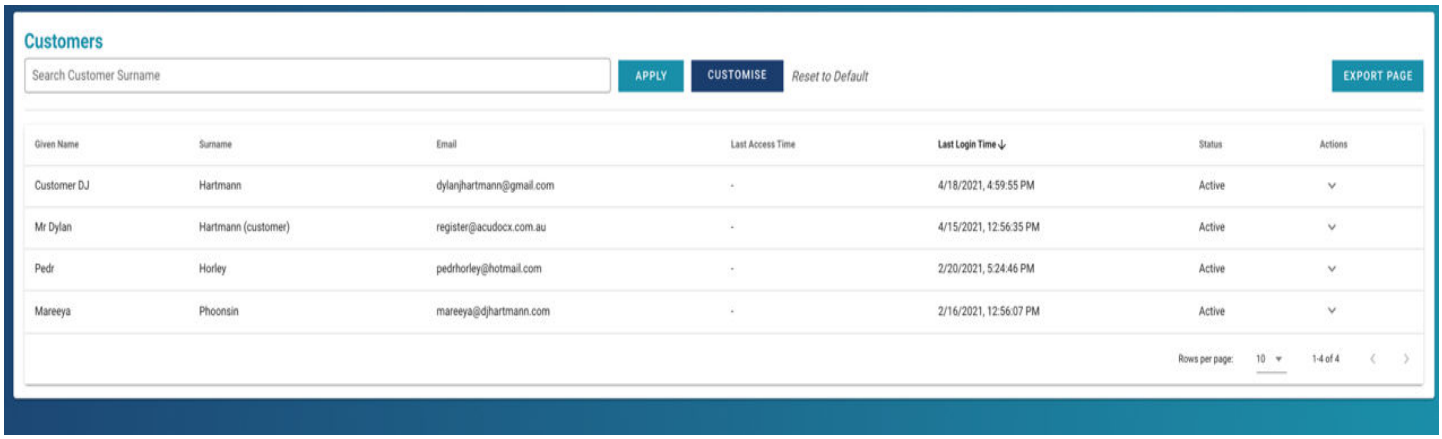
Place the translated documents in a plastic sleeve, and inside a manila folder or similar. Provide your customers with the **tracking number**. You can do so through the AcudocX messaging system.

CUSTOMERS

From your left navigation menu, select **Customers** to view a full list of all your assigned customers here.

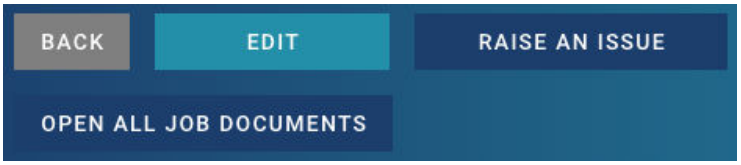
You can view details:

- Name
- Email
- Status
- Last Access Time
- Last Login Time
- Comments



ISSUES

Issues is a function in the AcudocX system that allows either a customer or a provider to **raise an issue** to register a disagreement about some aspect of the translation job that has recently been completed.



Our current issues include the following:

- Resend translation
- Refund (please see page 18 for more information)

ISSUES WORKFLOW

The party raising an issue will identify the corrective action desired of the other party. This may include outcomes such as changing some aspect of the job documents, editing some of the translation work or changing the amount payable for the job.

The system passes the issue to the other party for review. They can choose to accept the proposed corrective action, reject the corrective action or send the issue to the system admin for adjudication.

Both parties can comment on the issue, with the general intent that a mutually-agreeable outcome be reached.

The system will send email notifications to both parties whenever a change is made to the issue information.

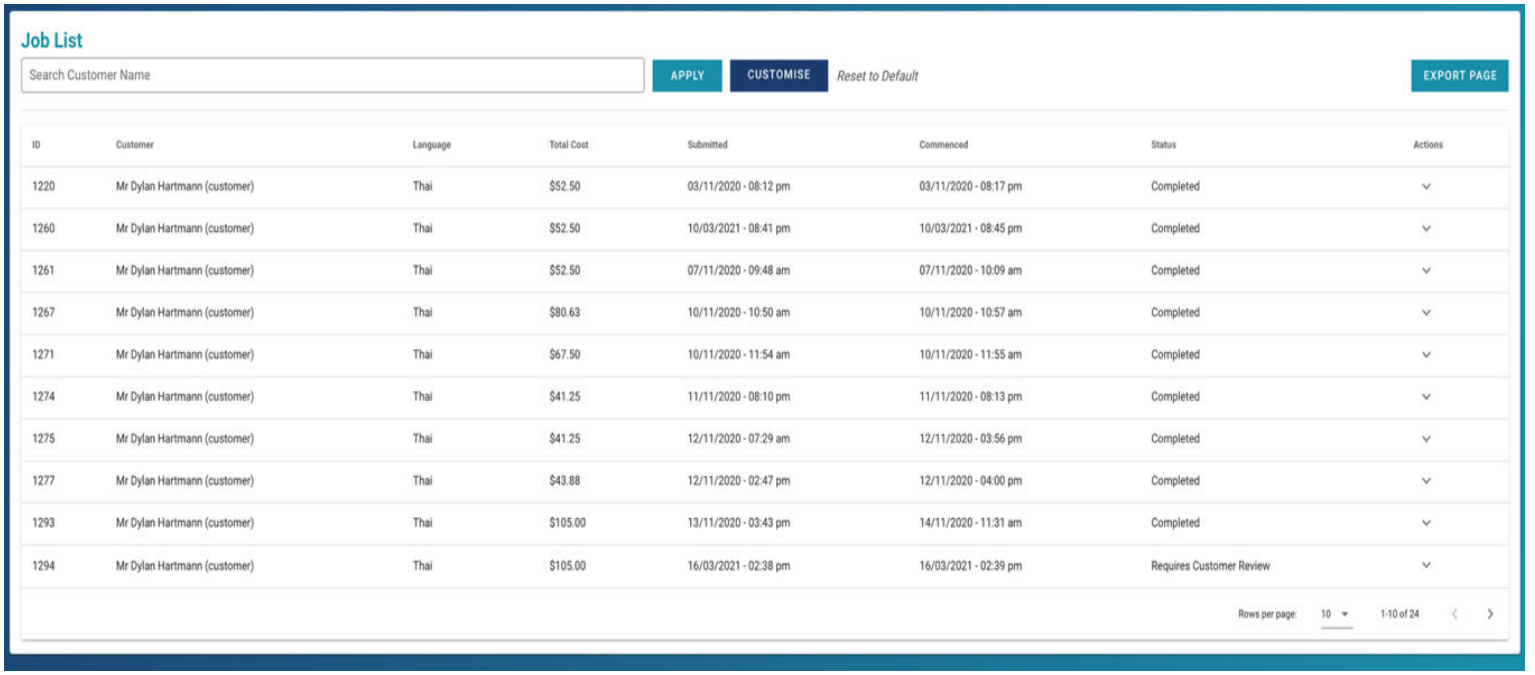
JOBS

From your left navigation menu, select **Jobs** to view a full list of all your processed jobs.

You can view the following details:

- Customer
- Language
- Cost
- Date submitted/commenced
- Status

You can also access the job's details and documents from this list.



REPORTING

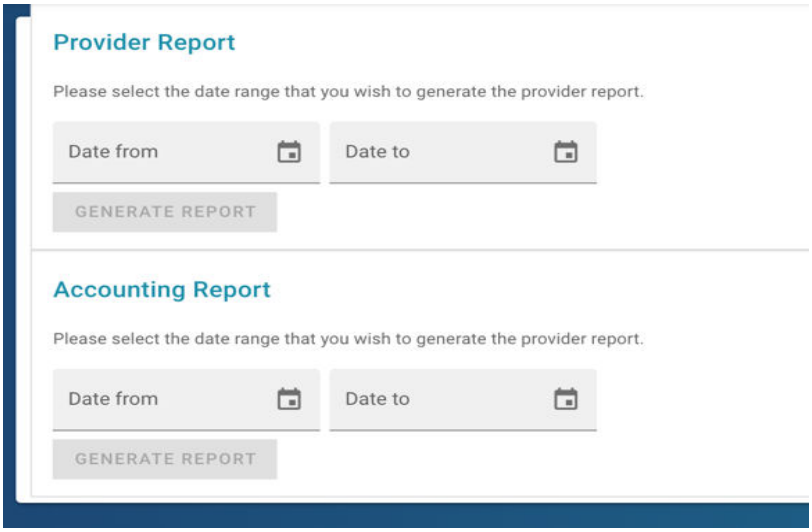
Select **Reporting** under the left navigation menu to view your provider and accounting report.

Provider report:

The provider report contains basic information on jobs, status, cost, and duration.

Accounting report:

The accounting report contains full information for an accountant or bookkeeper.

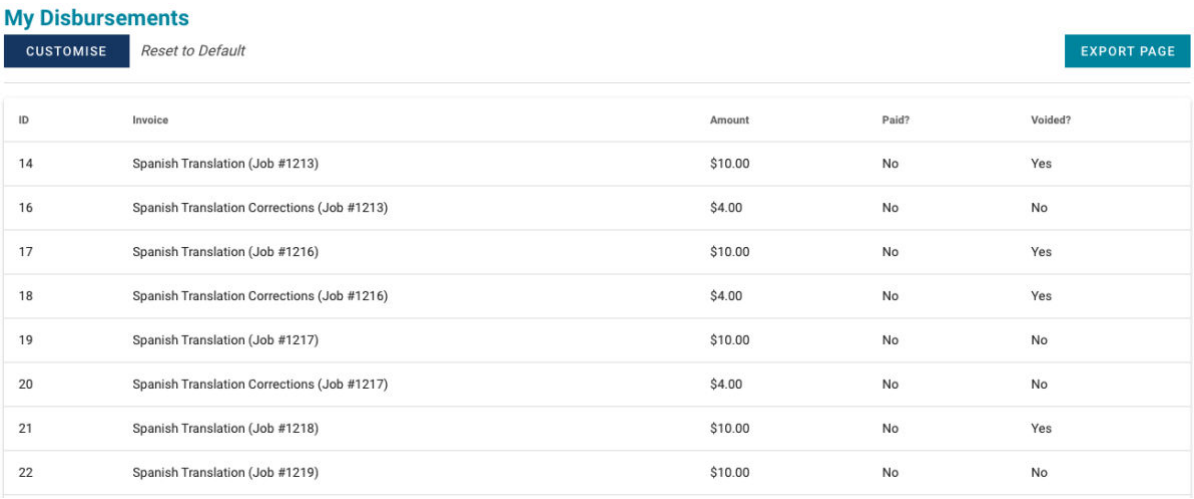


MY DISBURSEMENTS

Select **My Disbursements** under the left navigation menu to view a list of all disbursements (payments sent to you as a provider)

Date	Transaction Date Time	Transaction Receipt	Transaction Reference	Transaction Amount	Provider Total Inc Tax	Provider Tax	Provider Total Ex Tax	Service Fee Total Inc Tax	Service Fee Tax	Service Fee Total Ex Tax	Total Ex Tax	Total Inc Tax	Total Tax	Postage Fee Total Inc Tax	Net Disbursement Amount
10/03/2021	10/03/2021 20:03	ch_1ITPU9CAHIdFpQkJs0NikyLE	C40-3	52.5	50	4.55	45.45	2.5	0.23	2.27	47.72	52.5	4.78	0	50
16/03/2021	16/03/2021 14:03	ch_1IVUfcCAHIdFpQkJIaJ2E1rq	C40-14	105	100	9.09	90.91	5	0.45	4.55	95.46	105	9.54	0	100
03/03/2021	03/03/2021 22:03	ch_1IQtT0CAHIdFpQkJumFOaTT5	C40-18	26.25	25	2.27	22.73	1.25	0.11	1.14	23.87	26.25	2.38	0	25
26/03/2021	26/03/2021 14:03	ch_1IZ7BcCAHIdFpQkJlkEp7wmj	C40-25	54.25	50	4.55	45.45	4.25	0.39	3.86	49.31	54.25	4.94	0	50
15/04/2021	15/04/2021 13:04	ch_1IgLXzCAHIdFpQkJrfZIGwjI	C40-26	54.25	50	4.55	45.45	4.25	0.39	3.86	49.31	54.25	4.94	0	50
15/04/2021	15/04/2021 13:04	ch_1IgLhACAHIdFpQkJatfSp3wQ	C40-27	54.25	50	4.55	45.45	4.25	0.39	3.86	49.31	54.25	4.94	0	50
17/04/2021	17/04/2021 12:04	ch_1Ih3X6CAHIdFpQkJpo05evaQ	C21-1	20.64	17.99	1.64	16.35	2.65	0.24	2.41	18.76	20.64	1.88	0	17.99

Disbursements are sent within 2 business days. Once our system becomes fully automated, the frequency of disbursements will be increased.



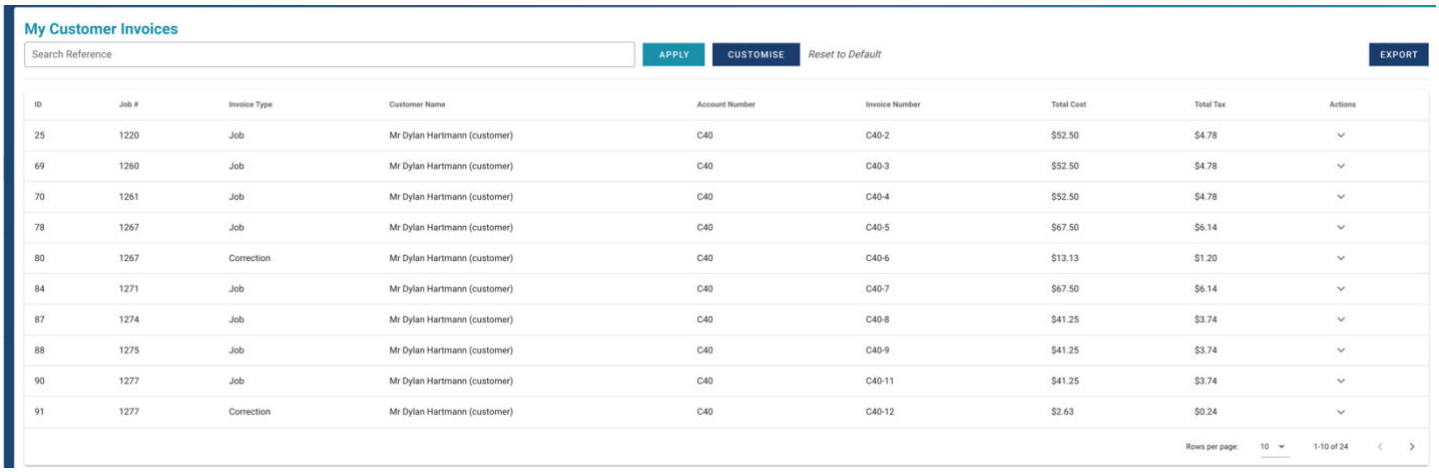
MY CUSTOMER INVOICES

Select **My Customer Invoices** in the left navigation menu to view a full list of customer invoices.

You can see details such as:

- Invoice type (Job or Correction)
- Customer's name
- Total cost
- Total tax

You can also issue a refund from this page.

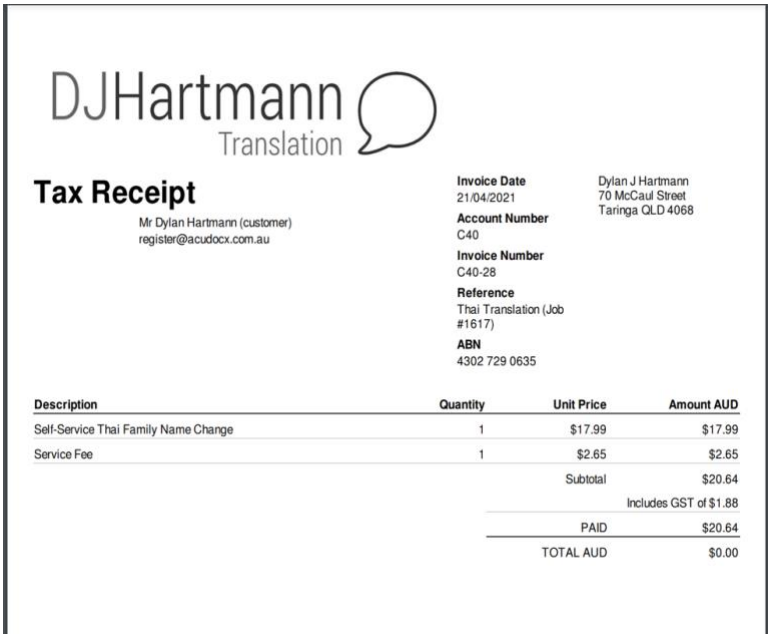


ID	Job #	Invoice Type	Customer Name	Account Number	Invoice Number	Total Cost	Total Tax	Actions
25	1220	Job	Mr Dylan Hartmann (customer)	C40	C40-2	$52.50	$4.78	
69	1260	Job	Mr Dylan Hartmann (customer)	C40	C40-3	$52.50	$4.78	
70	1261	Job	Mr Dylan Hartmann (customer)	C40	C40-4	$52.50	$4.78	
78	1267	Job	Mr Dylan Hartmann (customer)	C40	C40-5	$67.50	$6.14	
80	1267	Correction	Mr Dylan Hartmann (customer)	C40	C40-6	$13.13	$1.20	
84	1271	Job	Mr Dylan Hartmann (customer)	C40	C40-7	$67.50	$6.14	
87	1274	Job	Mr Dylan Hartmann (customer)	C40	C40-8	$41.25	$3.74	
88	1275	Job	Mr Dylan Hartmann (customer)	C40	C40-9	$41.25	$3.74	
90	1277	Job	Mr Dylan Hartmann (customer)	C40	C40-11	$41.25	$3.74	
91	1277	Correction	Mr Dylan Hartmann (customer)	C40	C40-12	$2.63	$0.24	

Rows per page: 10 1-10 of 24

Invoices are automatically generated on behalf of you to your customer. Invoices will include AcudocX's service fee of 5% + $1.75.

The service fee is automatically deducted before disbursement.



DJHartmann Translation

Tax Receipt

Mr Dylan Hartmann (customer)
register@acudocx.com.au

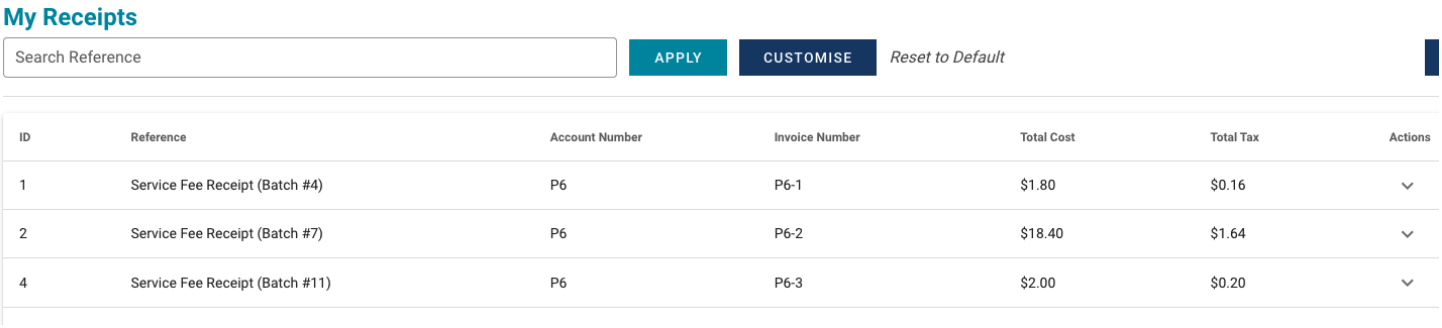
Invoice Date
21/04/2021
Account Number
C40
Invoice Number
C40-28
Reference
Thai Translation (Job #1617)
ABN
4302 729 0635

Dylan J Hartmann
70 McCaul Street
Taringa QLD 4068

Description	Quantity	Unit Price	Amount AUD
Self-Service Thai Family Name Change	1	$17.99	$17.99
Service Fee	1	$2.65	$2.65
		Subtotal	$20.64
			Includes GST of $1.88
		PAID	$20.64
		TOTAL AUD	$0.00

MY RECEIPTS

Select **My Receipts** under the left navigation menu to view a full list of receipts issued on behalf of you, as a provider, to AcudocX (for payment of service fees).



ID	Reference	Account Number	Invoice Number	Total Cost	Total Tax	Actions
1	Service Fee Receipt (Batch #4)	P6	P6-1	$1.80	$0.16	
2	Service Fee Receipt (Batch #7)	P6	P6-2	$18.40	$1.64	
4	Service Fee Receipt (Batch #11)	P6	P6-3	$2.00	$0.20	

This is an accounting exercise.

AcudocX is **not an employer**, but a tool used by providers. The service fee tax receipt is issued by AcudocX to the provider for all fees that were charged to customers.

AcudocX

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Tax Receipt

Dylan J Hartmann
info@djhartmann.com

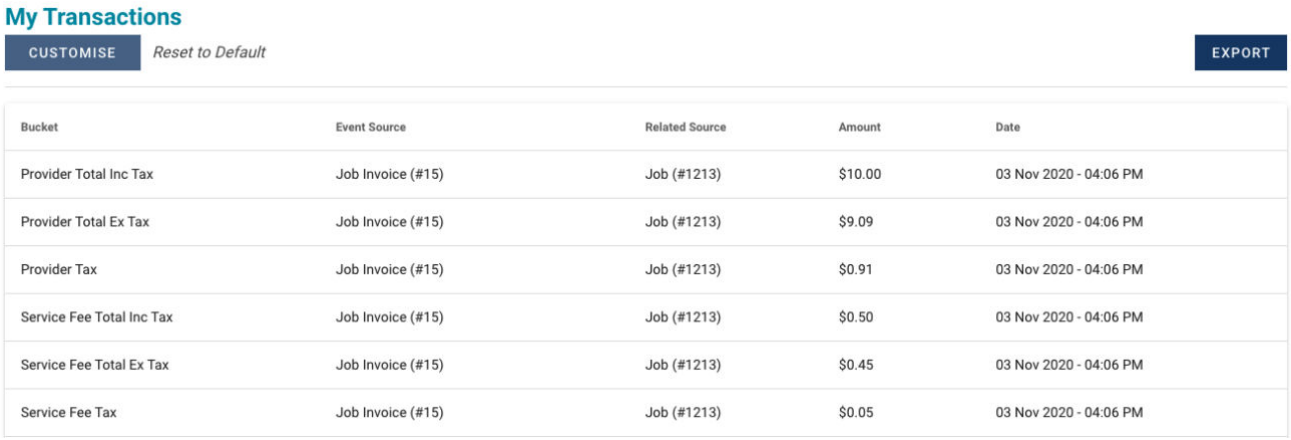
Invoice Date
18/01/2021
Account Number
P5
Invoice Number
P5-2
Reference
Service Fee Receipt (Batch #2)
ABN
53637695286

AcudocX Pty Ltd
70 McCaul Street
Taringa Queensland 4068

Description	Quantity	Unit Price	Amount AUD
Service Fee (Job #1203)	1	$2.50	$2.50
Service Fee (Job #1205)	1	$1.25	$1.25
Service Fee (Job #1210)	1	$1.25	$1.25
Service Fee (Job #1236)	1	$3.25	$3.25
Service Fee (Job #1216)	1	$2.75	$2.75
Service Fee (Job #1214)	1	$1.25	$1.25
Service Fee (Job #1244)	1	$3.75	$3.75
Service Fee (Job #1243)	1	$2.50	$2.50
Service Fee (Job #1237)	1	$6.50	$6.50
Service Fee (Job #1241)	1	$3.25	$3.25
Service Fee (Job #1245)	1	$5.00	$5.00
Service Fee (Job #1246)	1	$0.50	$0.50
Service Fee (Job #1243)	1	$0.10	$0.10
Service Fee (Job #1253)	1	$2.25	$2.25
Service Fee (Job #1255)	1	$2.25	$2.25
Service Fee (Job #1254)	1	$2.25	$2.25
Service Fee (Job #1256)	1	$2.25	$2.25
Service Fee (Job #1263)	1	$2.25	$2.25
Service Fee (Job #1263)	1	$2.00	$2.00
		Subtotal	$47.10
			Includes GST of $4.26
		PAID	$47.10
		TOTAL AUD	$0.00

MY TRANSACTIONS

Select **My Transactions** under the left navigation menu to view a detailed list of every transaction.



MY USERS

Select **My Users** under the left navigation menu to add additional users.

Adding more users will allow you to register additional emails under the same provider profile, each with their individual two-factor authentication.

Select the **CREATE** button to get started.

REFUNDS

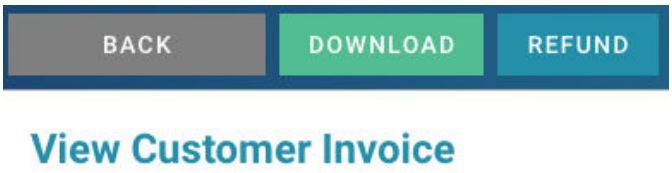
If the provider and customer have come to a mutual agreement on a refund through the messages function, providers may make customer refunds **within the system.**

Providers may choose to refund either a translation job or any corrections (edits) from a job.

1. Go to the left navigation menu
2. Select **Customer Invoices**
3. Find the Invoice you wish to refund the customer.

Note: *The 'Job' invoice type is the price of your document (extract or full)*
The 'Correction' invoice type is the total price of any additional edits in a job that the customer has paid.

4. Under actions, press View.
5. Press **REFUND**



6. Select the tab **DASHBOARD** from the left navigation menu.
7. Find the refunded job in your pending jobs
8. Select to view the job, then choose **ABANDON JOB**

*Refunding only applies to **one** invoice you select at a time.*

Hence, please ensure you refund the correct invoice.

BOOKKEEPING RECOMMENDATIONS

The AcudocX platform automatically generates tax invoices on your behalf. The Australian Taxation Office (ATO) requirement is to provide a valid tax invoice for each job. This can be satisfied by the AcudocX platform.

Below are recommendations for bookkeeping reconciliation, from TNR Tax Accountants:

Option 1:

Record the deposit in your bank account as income and allow for the GST component, if you are registered for GST.

Each disbursement you receive from AcudocX will be made in the form of individual payments, with each transaction referencing the individual job number in the bank transaction details. This is enough to satisfy bookkeeping requirements. If at any point you need the tax invoice, this is stored on your AcudocX account and can be downloaded.

To further simplify the process, if you use an accounting software program, we suggest you consult with your software provider for specific instructions on how to process these types of recurring transactions.

An example is provided below:

In your accounting program create a rule for money in (selecting your bank account).

Include the details: Description Contains 'Transfer Acudocx Pty Ltd'
Then assign transaction type: Deposit, category: Sales (Australia), payee: AcudocX
This transaction type can then be set to auto-confirm.

Option 2:

Enter the **invoice** into your own software systems as accounts receivable (debtor), recording the 'AcudocX Job' as Income and the 'Service Fee' as an Expense (allowing for the GST component, where applicable).

Next, record the deposit in your bank account as part payment of the invoice.

Then, create a **credit note** for the 'Service Fee', applying it to the balance outstanding on the **invoice**.

Again, if you use an accounting software program, we suggest you consult with the software provider for specific instructions on how to create invoices and credit notes.

(The first option outlined is simpler and the method we recommend. However, either option is possible for you. You can also get advice from your own tax accountant or bookkeeper.)

HOW TO USE LIST FUNCTIONS

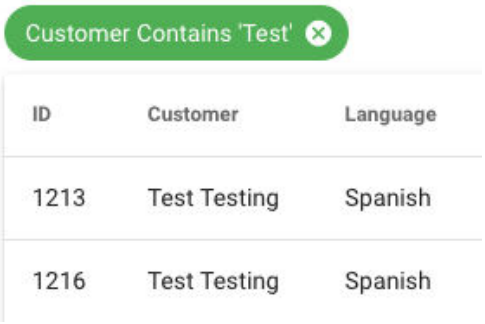
Under **Customers, Issues, Jobs, Customer Invoices, My Languages** and **My Users,** you can customise and filter your search.

Here is how to use these functions.

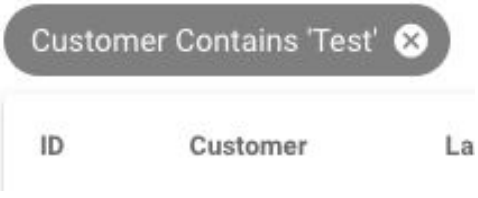
To search for jobs containing your chosen words:

1. Type into the search field, then choose **APPLY**

2. A filter for your word should appear as active, arranging jobs containing the search first.

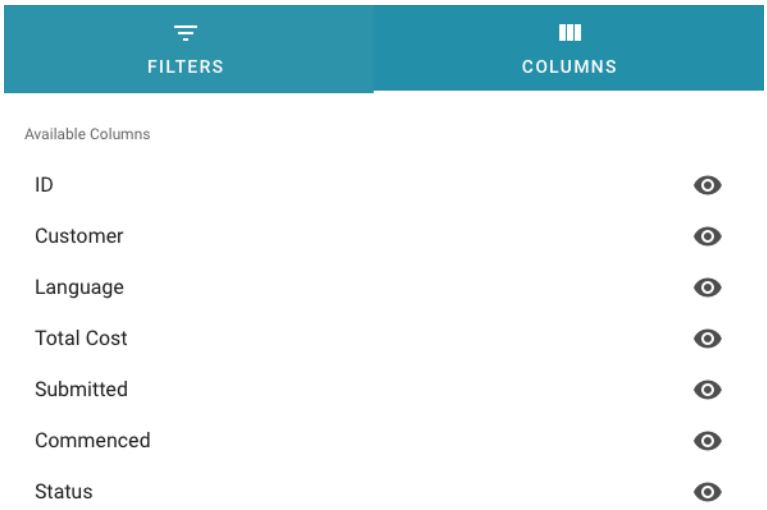


3. You can activate or deactivate the filter by clicking on it, or the eye icon under **CUSTOMISE**



A provider can also hide or display certain columns, including ID, Language, Total Cost, etc.

1. Select the button **CUSTOMISE**, then choose **COLUMNS**.



2. Press the eye icon for the desired column you wish to hide or display.

The button ***Reset to Default*** removes all filters and unhides all columns.

EXPORTING PAGES

Providers can export data from their provider account to an excel spreadsheet (.xlsx file).

To export a page, press **EXPORT PAGE/EXPORT** on the right of the screen.

The pages which you can export are:

- **Customers**
- **Issues**
- **Jobs**
- **My Disbursements, My Customer Invoices, My Receipts, My Transactions**.
- **My Languages**
- **My Users**

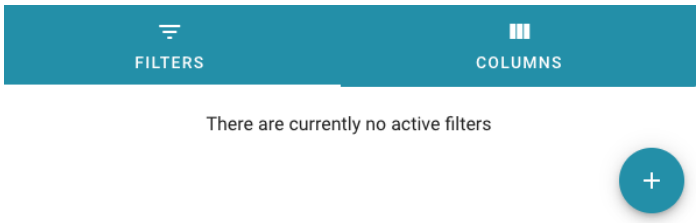
Exporting specific information

If you would like to **filter specific information**, for instance, only correction (edit) invoices in **My Customer Invoices,** you can do so in two ways:

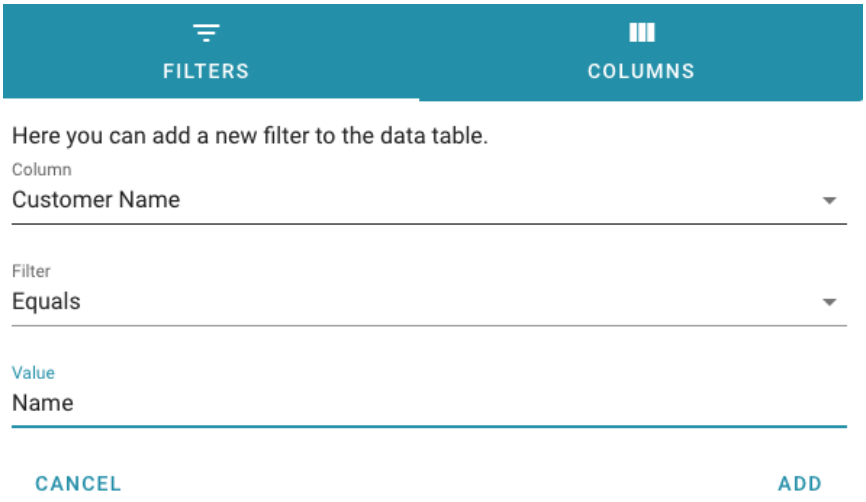
1. Enter your required information in the search bar, select the **CUSTOMISE** button, then press **EXPORT** (choose **All entries matching the provided filters**).

Note: The search bar is **limited to the text stated in the bar**. For the **Customers** search bar, you will only be able to search the Customer's Surname, for instance (see above image). Searching for other fields, i.e., the customer's email using this search bar will yield no results. Instead, **follow option 2**.

2. Press on **CUSTOMISE.**

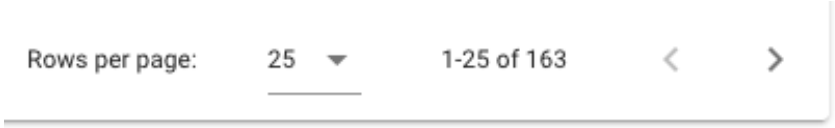


- Press the add button, then choose which column your search will fall under (i.e., to filter a customer's name, choose the column 'Customer Name')
- Choose the filter you require
- Enter in your search
- Press **ADD**



The page will display with the information you have customised.

Note: *To show more rows of data on your export, at the bottom of your screen, please ensure to change the number of rows per page (otherwise, only the default number of rows per page will be exported.)*



AcudocX

SCAN | SELECT | TRANSLATE | CERTIFY

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