Plunet customer portal - User guide

Knowledge Center

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Summary: A guide for your customers on how to use the Plunet customer portal

Related features

- Plunet customer portal - Settings[1]

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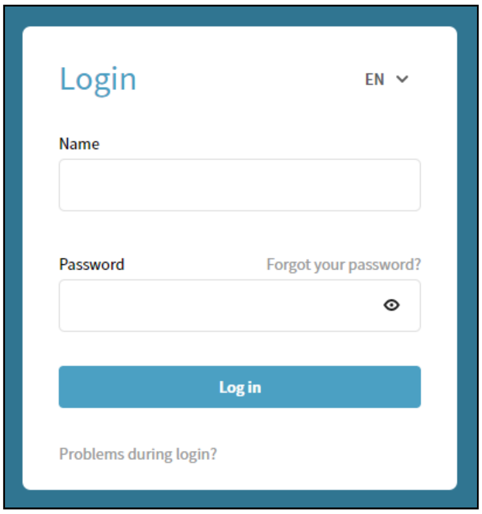
1 https://helpdesk.plunet.com/plugins/servlet/desk/site/global/article/3932161/Plunet+customer+portal+-+Settings

1 Introduction

This guide is aimed at all users who work with the Plunet BusinessManager customer portal. You can use Plunet BusinessManager to request projects, view the status of your quotes and orders, download delivered documents, and give job feedback.

2 Login

Enter the URL of Plunet BusinessManager in the address bar of your Internet browser. Log into the system with your user name and password. Please make sure that you disable your browser's pop-up blocker.



NOTE

If you enter the wrong password three times in a row, your account will be automatically locked for 24 hours. To unlock your account sooner, please contact your administrator. If you have forgotten your password, you can click on **Forgot your password?** and a new password will be sent to you by e-mail. If you have problems logging into Plunet BusinessManager, please click on **Problems during login?** and fill in the form to send a message to the system administrator.

3 Navigation

Plunet BusinessManager is based on web technologies and is designed in a completely browser-based manner. Using the software is generally similar to browsing through a website. The navigation in Plunet BusinessManager is divided into the following levels:

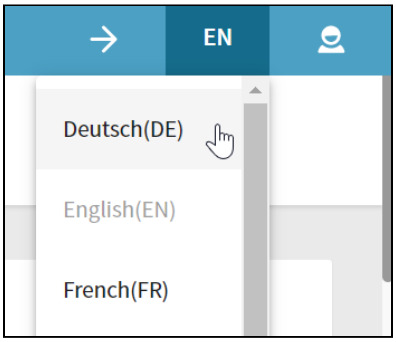
- Tabs or main menus
- Menus
- Sub-menus

The number of tabs and menus that you can access depends on your rights and the modules that have been enabled for you. Click on a tab to access additional menu items at the menu level. These items then lead to additional menu items at the sub-menu level. When you click on a menu item at the sub-menu level, the view automatically jumps down to the corresponding section.

4 Action bar

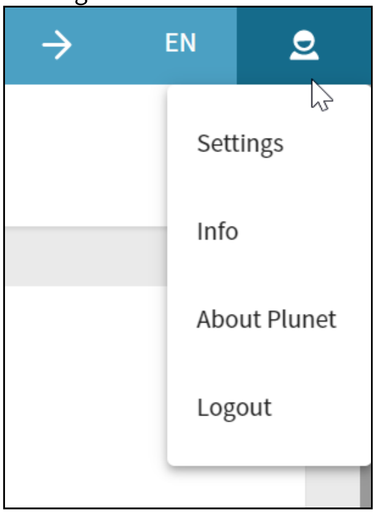
5 Selecting a user interface language

You can select the language for the Plunet user interface by clicking on the language code in the top right-hand corner:



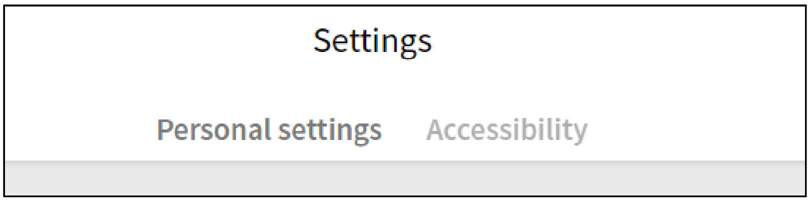
6 User

Clicking on the user button in the top right-hand corner allows you to access multiple functions:



6.1 Settings

Here you can make user-specific settings for Plunet BusinessManager, such as changing your password and display settings:



6.2 Info

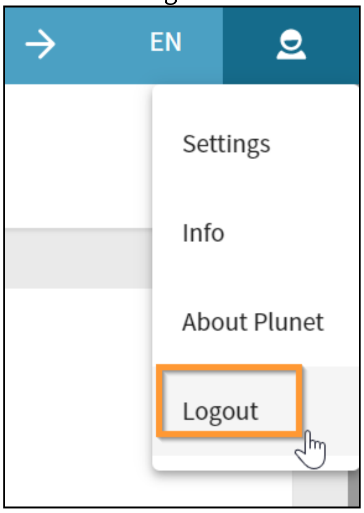
When you click on **Info** from the menu in the top right-hand corner of Plunet, the **Info** window opens. Here you can find useful documents and links:

6.3 About Plunet

This option provides you with general information about the software, including the version number and release date:

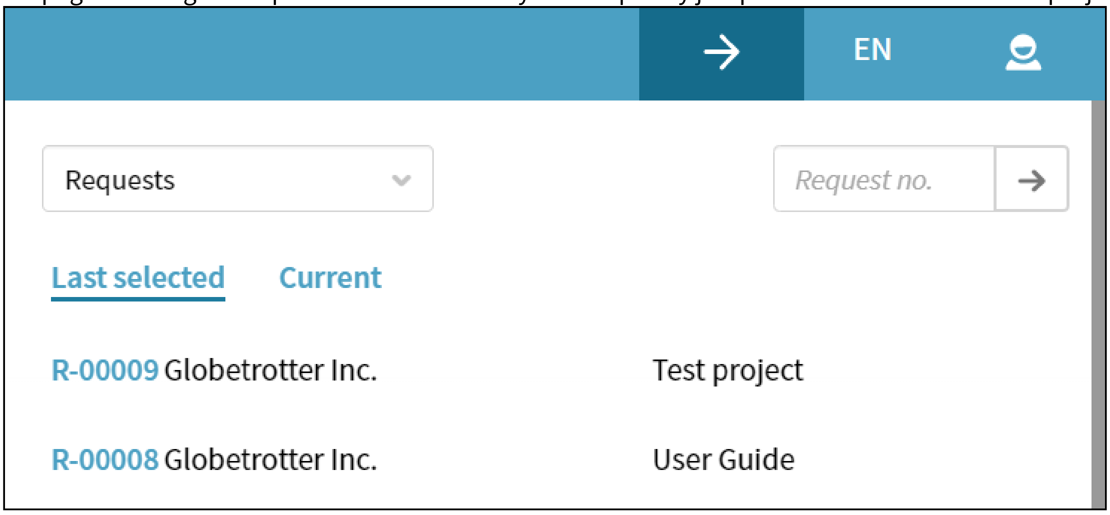
6.4 Logout

Click here to log out of Plunet BusinessManager:

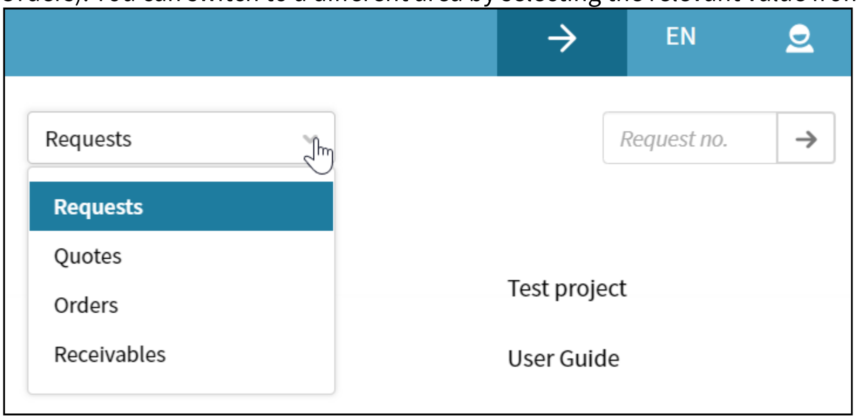


7 Switch button

The "Switch" button  can be found to the left of the action bar. It is always visible, even when you scroll down the page. Clicking on it opens a window where you can quickly jump to other data records and projects:

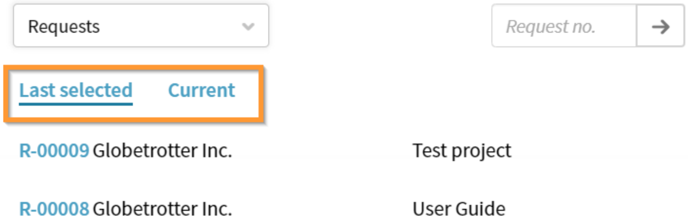


The window will first give you the option of switching to another data record within the same area (e.g. Requests, Orders). You can switch to a different area by selecting the relevant value from the drop-down list:



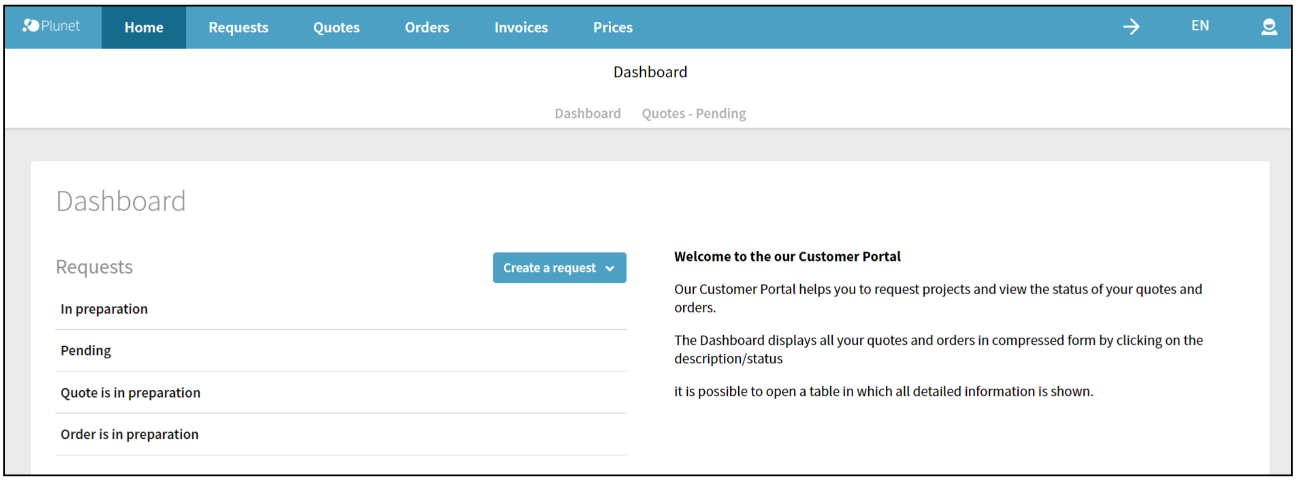
You can jump directly to a specific data record by entering the request, quote, job, order or invoice number:

The **Last selected** and **Current** lists are displayed underneath. **Last selected** shows you the data records that you have most recently viewed, while **Current** shows you the projects that still need to be worked on, sorted by project number:

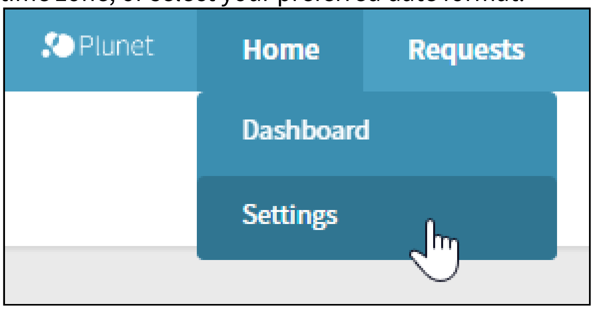

Requests
Request no.
Last selected
Current
R-00009 Globetrotter Inc.
Test project
R-00008 Globetrotter Inc.
User Guide

8 Dashboard

After logging in, the first thing you see is the **Dashboard**. This page contains an overview of your requests, quotes, orders and invoices. By clicking on a status (e.g. **In preparation** or **In progress**), you open a detailed list of all elements with that status.

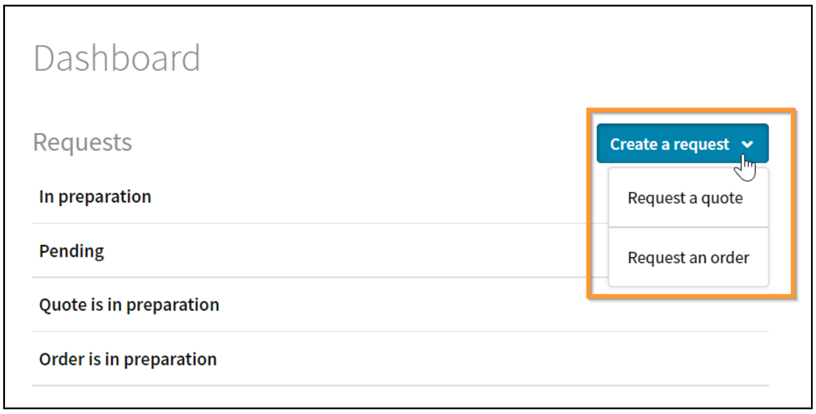


The Dashboard can also be reached via the **Home** menu. This menu also contains the **Settings** page, where you can find various options to customize Plunet BusinessManager. For example, you can change your password, set your time zone, or select your preferred date format:



9 Requests

In order to create a request, click **Create a request** on the Dashboard. You can decide whether you want to **Request a quote** or **Request an order:**



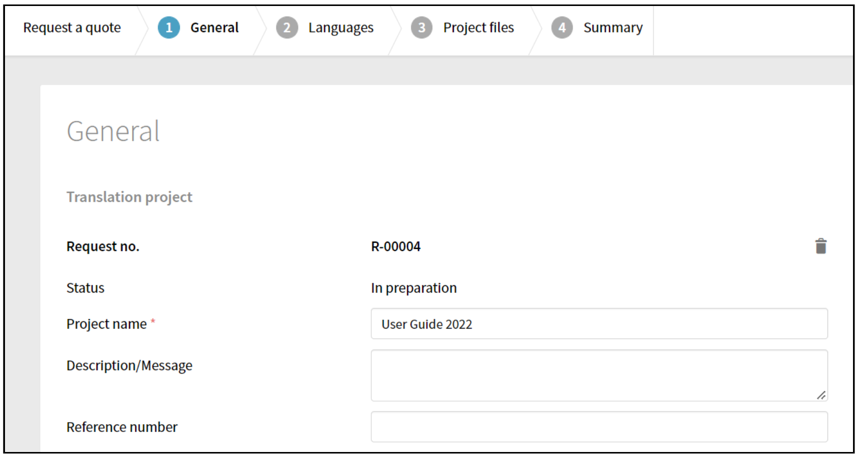
In the example below, we will request a quote. The steps involved in creating a request are visible at the top of the page, which means that you can always keep track of your progress. The current step is highlighted in bold. Completed steps are marked with a tick, but you can still access them again for further editing. At the bottom of each page, you have the option of going to the next step or returning to the previous step. Any changes you have made will be automatically saved in the process.

TIP

You can copy existing requests and change the due date. This will save time if you often create requests with similar requirements.

9.1 Step 1: General

Enter basic information on the project, such as the project name, the scope of service (in this case Translation, Editing, and Proofreading) and the delivery date.

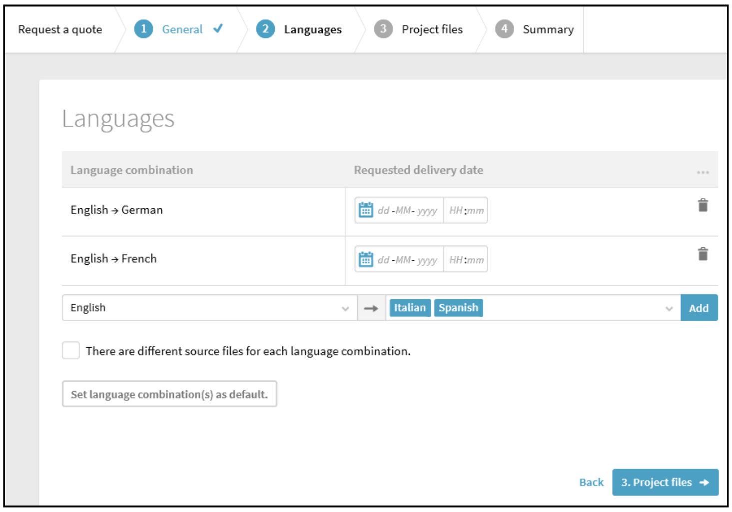


9.2 Step 2: Languages

Select the source and target languages and click on the plus button. If applicable, specify alternate delivery dates for different languages. These language combinations can also be saved as a default for future requests.

You can also specify if there are different source files for each language combination by selecting the corresponding checkbox. As a result, a different sub-folder is created for each language combination in the project folder.

If activated in your system, you can also select properties for each language combination.

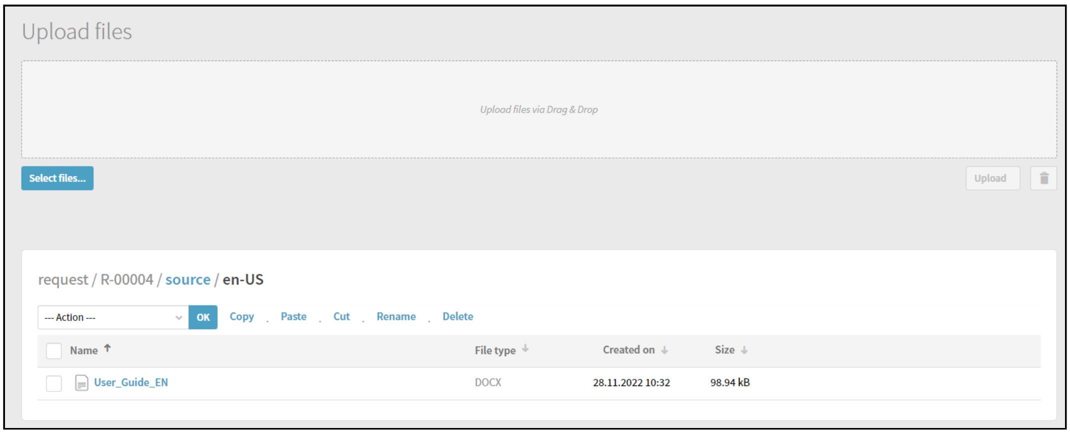


> **NOTE**
>
> At least one language combination must be selected before the request can be created.

9.3 Step 3: Project files

Upload the source files and any additional reference materials via FileManager. You can also upload the files with Drag & Drop by selecting the files in your file explorer and dragging them into FileManager.

If there are different source files for each language combination, then a separate sub-folder will be created for each language combination in the **Source** directory. When a quote or order is created from the request, the documents will be copied or moved to the corresponding item folder. When all files have been uploaded, close the window.



TIP

If you have style guides or glossaries that apply to all of your projects, you can make them part of your projects by default, which means that you do not need to upload them for every new project. They will be stored in a separate folder, which can be shared directly with your service providers. To set this up, please contact your project manager.

9.4 Step 4: Summary

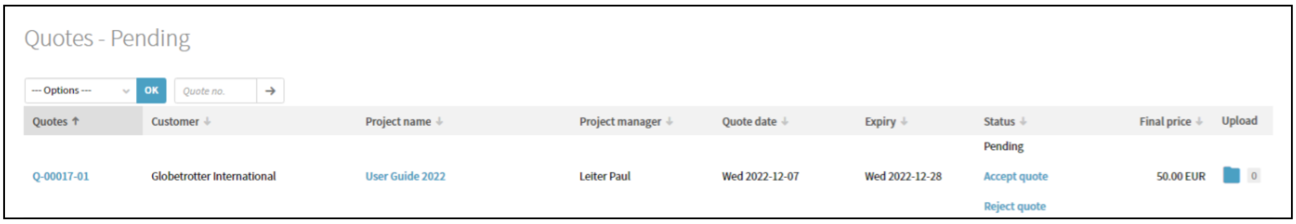
Now you can check the information you have entered. The information is initially displayed in "Read-only" mode. If you hover over one of the sections with the cursor, the **Edit** button appears, which you can click on to edit the information once more. Changes can then either be saved or discarded by clicking on **Save** or **Cancel**.

To complete the request, enter your e-mail address under **Send request confirmation to**. The options displayed here vary depending on whether you want to request a quote or place an order. If you want to request a quote, enter a due date for the quote. Click on **Request a quote** to send your request to the project manager or account manager, who will then send you a confirmation by e-mail. If you want to place an order, click on **Request an order** and the project manager or account manager will send you a confirmation by e-mail.

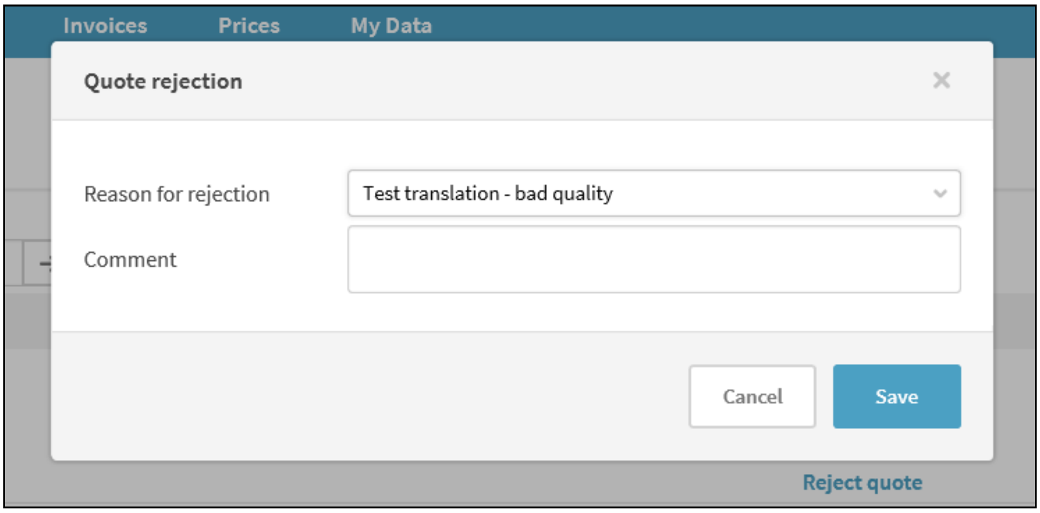
10 Quotes

When your request has been turned into a quote, you will be sent the quote by e-mail. You can accept or reject the quote by replying to the e-mail or via the **Dashboard**. The quote appears in the **Quotes** section on the Dashboard with the status **Pending**. You can directly accept the quote by clicking on **Place order** or reject it via **Reject quote**.

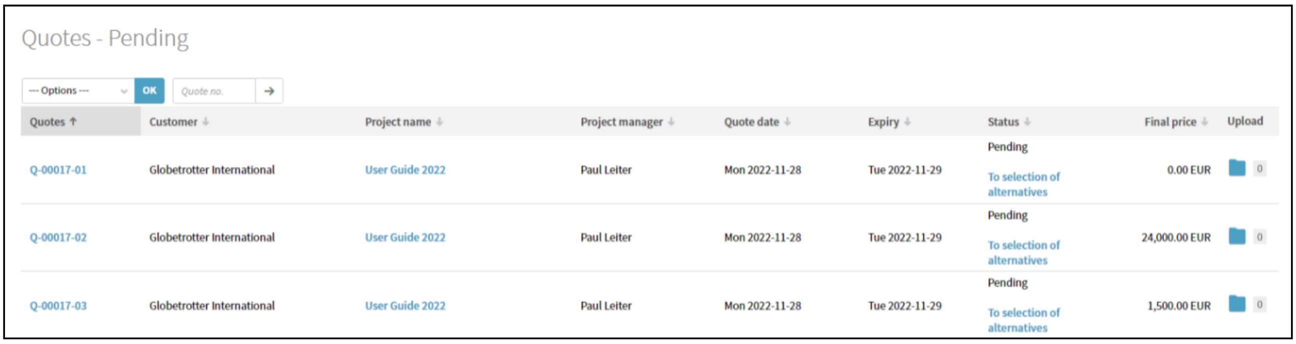
You can also click on the quote number in order to view the details before accepting/rejecting it.



If you click **Reject quote**, an overlay opens where you can select the reason for rejecting the quote and an optional comment. Depending on the reason for rejection, you may receive a new version of the quote.



If you have been sent multiple versions of a quote, they will all be displayed on your Dashboard. You can compare them by clicking **To selection of alternatives** and then decide which quote version to accept.



10.1 Status report - Quotes

You can browse all of your quotes under **Quotes** → **Status report - Quotes**. You can use multiple search functions and filters, including time period, project type, source language and target language. Click on **Update search** to start the search and the results will appear in the **Results** section below. Click on the quote number to switch to the detailed view of that quote.

11 Orders

Once an order has been created, you will receive a confirmation by e-mail. When all of the jobs in the order have been completed and the files delivered, you will be sent a delivery note. You can download the delivered files directly via FileManager under **Dashboard** → **Orders** → **Delivered documents**.

11.1 Status report - Orders

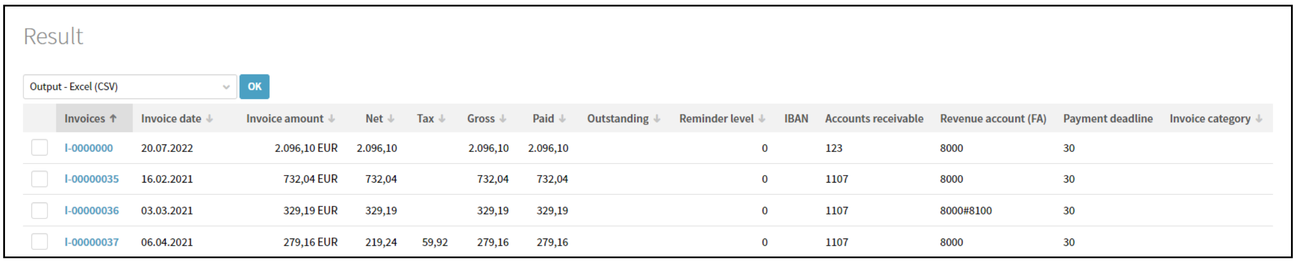
You can browse all of your orders under **Orders** → **Status Report - Orders**. You can use multiple search functions and filters, including time period, project type, source language and target language. Click on **Update search** to start the search and the results will appear in the **Results** section below. Click on the order number to switch to the detailed view of that order.

11.2 Order feedback

If the corresponding right has been enabled for you, you can give feedback on your completed orders. You will receive an e-mail from the project manager asking you to submit feedback. This e-mail includes a link, which you can use to directly log in to the order and enter your feedback.

12 Invoices

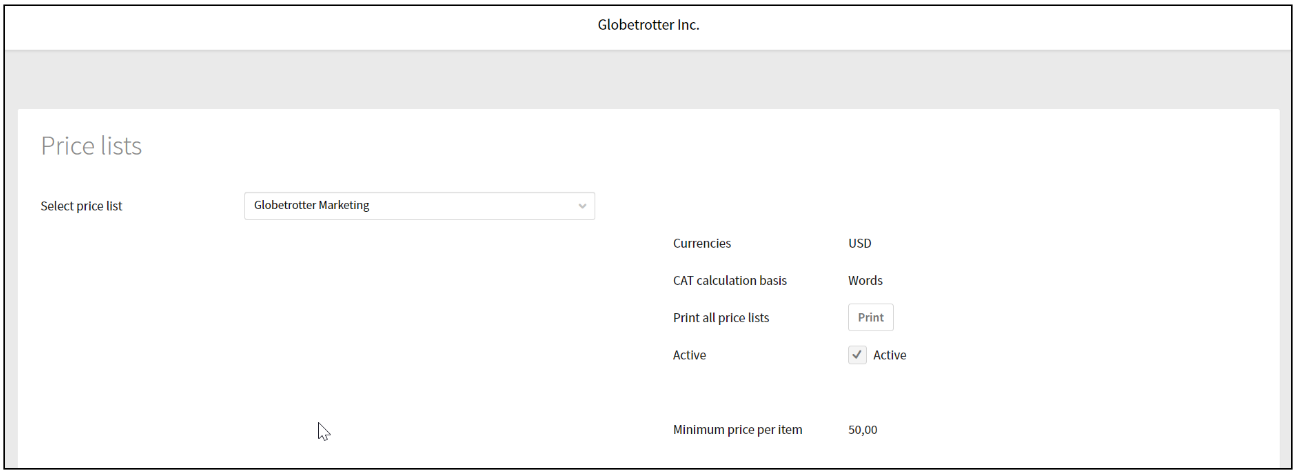
When the project manager sends you an invoice, it can be found in the **Invoices** section. Under **Invoices** → **Status report - Invoices** you can search through all of your invoices and export them to Excel. To do this, mark the checkboxes next to the invoices and select the **Output - Excel (CSV)** option from the drop-down list above the **Results** table.



Invoices	Invoice date	Invoice amount	Net	Tax	Gross	Paid	Outstanding	Reminder level	IBAN	Accounts receivable	Revenue account (FA)	Payment deadline	Invoice category
I-0000000	20.07.2022	2.096,10 EUR	2.096,10		2.096,10	2.096,10		0		123	8000	30	
I-00000035	16.02.2021	732,04 EUR	732,04		732,04	732,04		0		1107	8000	30	
I-00000036	03.03.2021	329,19 EUR	329,19		329,19	329,19		0		1107	8000#8100	30	
I-00000037	06.04.2021	279,16 EUR	219,24	59,92	279,16	279,16		0		1107	8000	30	

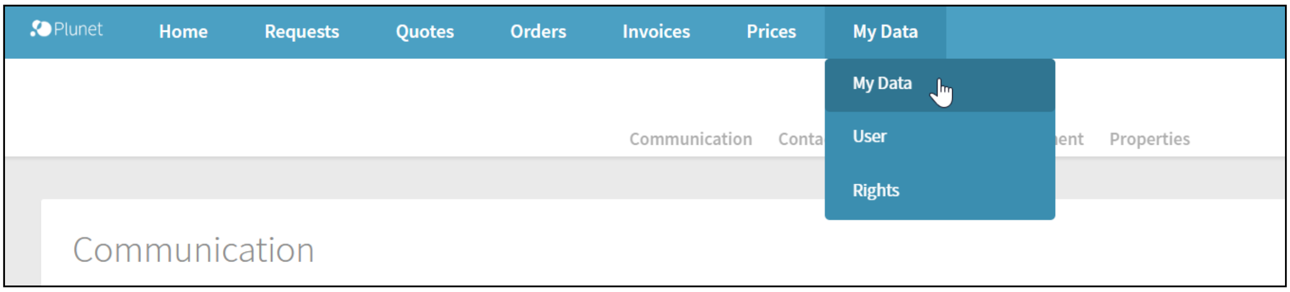
13 Prices

In the **Prices** section, you can view your price lists and see the costs for the different prices per language combination.

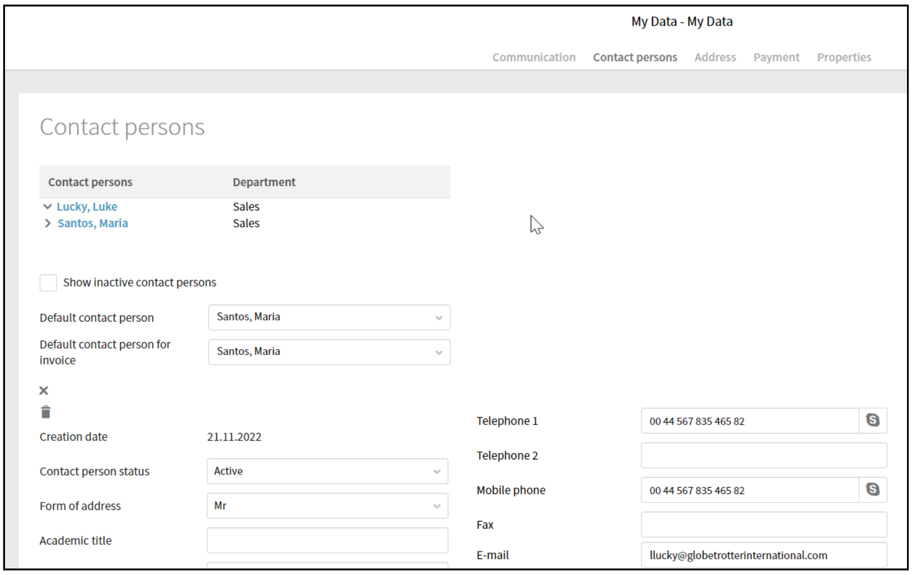


14 My Data

If you have an Admin customer account, you have access to your company's details in the **My Data** area.

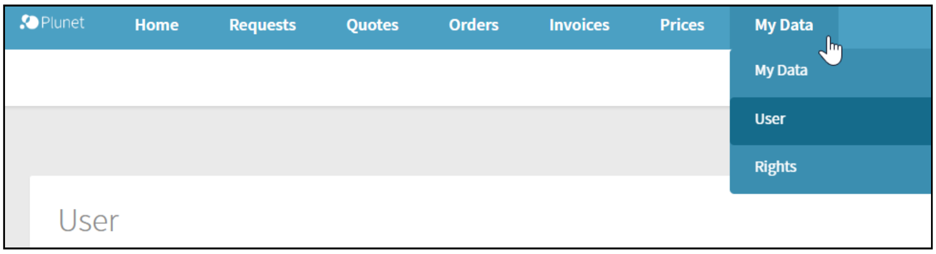


The **Communication**, **Address**, **Payment** and **Properties** sections are read-only - you can review and check all information but not make any changes. In the **Contact persons** section, you can manage the contact persons within your organization. For example, you can modify the contact details of your existing contacts, select default contact persons, and add new ones:

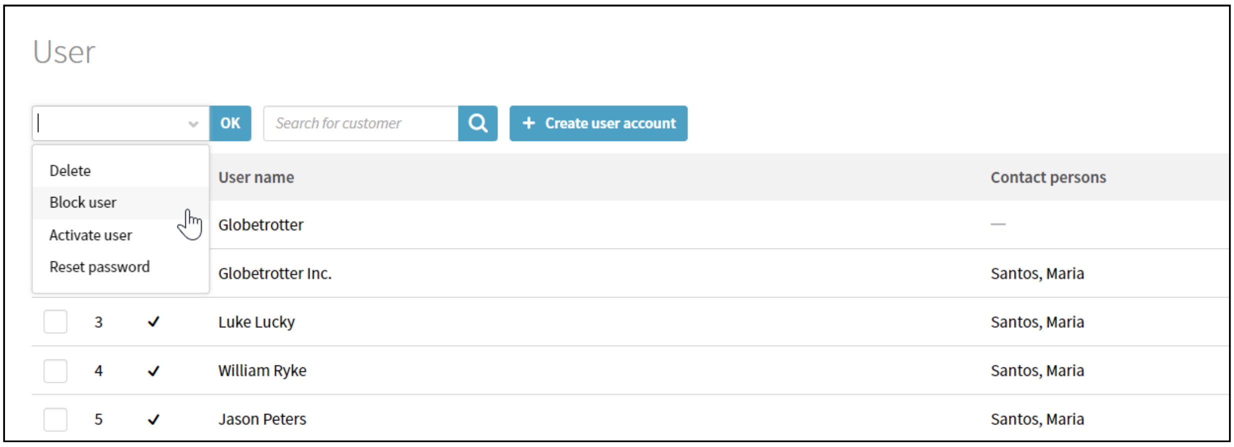


14.1 User

In the **User** area, you can manage the user accounts for other people in your organization.

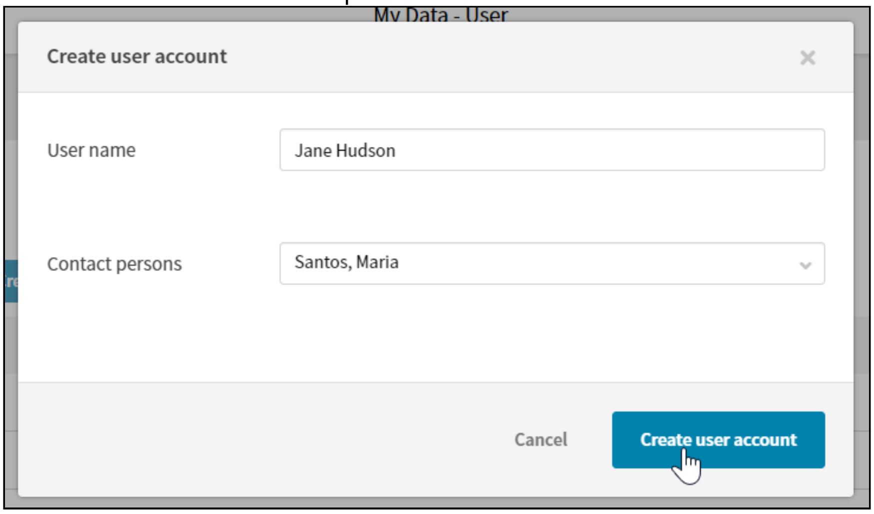


You can activate, block or delete user accounts via the drop-down list. If an account has been blocked, a cross will appear in the **Active** column.



You can also create a new user:

1. Enter a user name and contact person and click **Create user account**.



14.2 Rights

In the **Rights** area, you can manage the rights assigned to the users in your organization.

Rights

No.	User name	Contact persons			
3	Globetrotter		FileManager	Requests Requests of all contact persons	Quotes Orders
4	Globetrotter Inc.	Santos, Maria	FileManager	Requests Requests of all contact persons	Quotes Orders
5	Luke Lucky	Santos, Maria	FileManager	Requests Requests of all contact persons	Quotes Orders
6	William Ryke	Santos, Maria	FileManager	Requests Requests of all contact persons	Quotes Orders

NOTE

You can only manage rights in the customer portal if rights have not already been assigned to the users. Otherwise the **Rights** section is read-only, and a tooltip is displayed:

> The rights of this user cannot be changed due to the assigned rights group. Please contact your account manager in order to make the required changes.

14.3 Copyright notice

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