Plunet BusinessManager 7.2

Plunet customer portal

AUTHOR

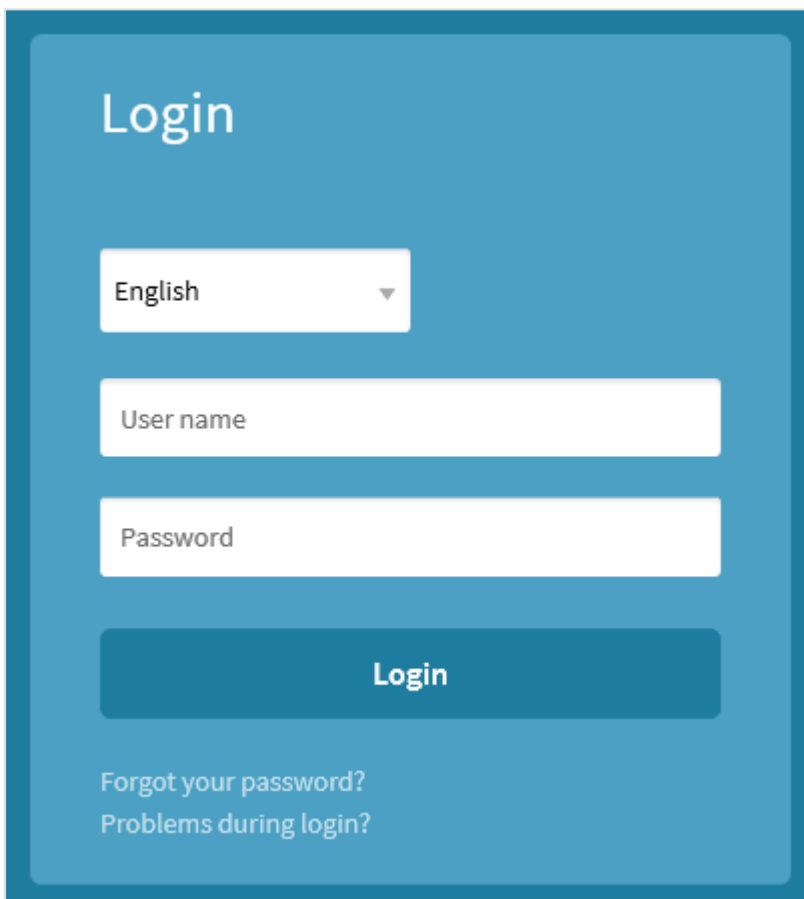Plunet GmbH

Contents

Introduction

This description is aimed at all customers who work with Plunet BusinessManager using the 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.

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 to 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.

Navigation

The navigation in Plunet BusinessManager is divided into the following levels:

- Tabs

- 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.
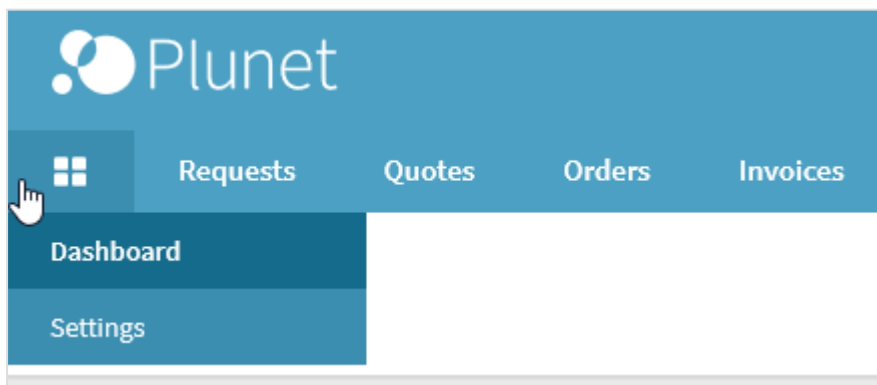
Action bar

Info

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

User

Clicking on 👤 opens the *User* window, where you can find information on the currently logged in user, as well as the option of making user-specific settings.

Logout

Click on ⏻ to log out of Plunet BusinessManager.

Switch button

The "Switch" button → can be found at the far right of the title row. It is always visible at the top right, even when you scroll down the page. Clicking on → opens a window, where you can quickly jump to other data records and projects, e.g. in order to view an older request as a reference for a new request. The window initially provides you with the option of switching to another data record in the same area. You can switch to a different area by selecting the relevant value from the drop-down list.
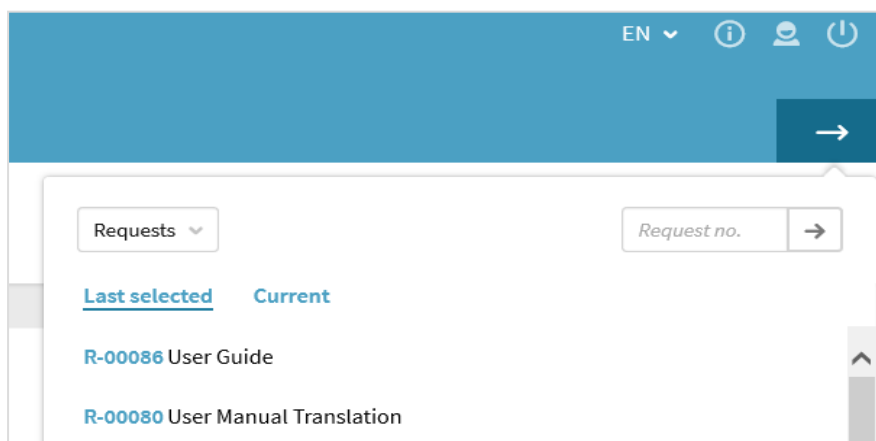
You can jump directly to a specific data record by entering the request, quote, job, order or invoice number. The *Last se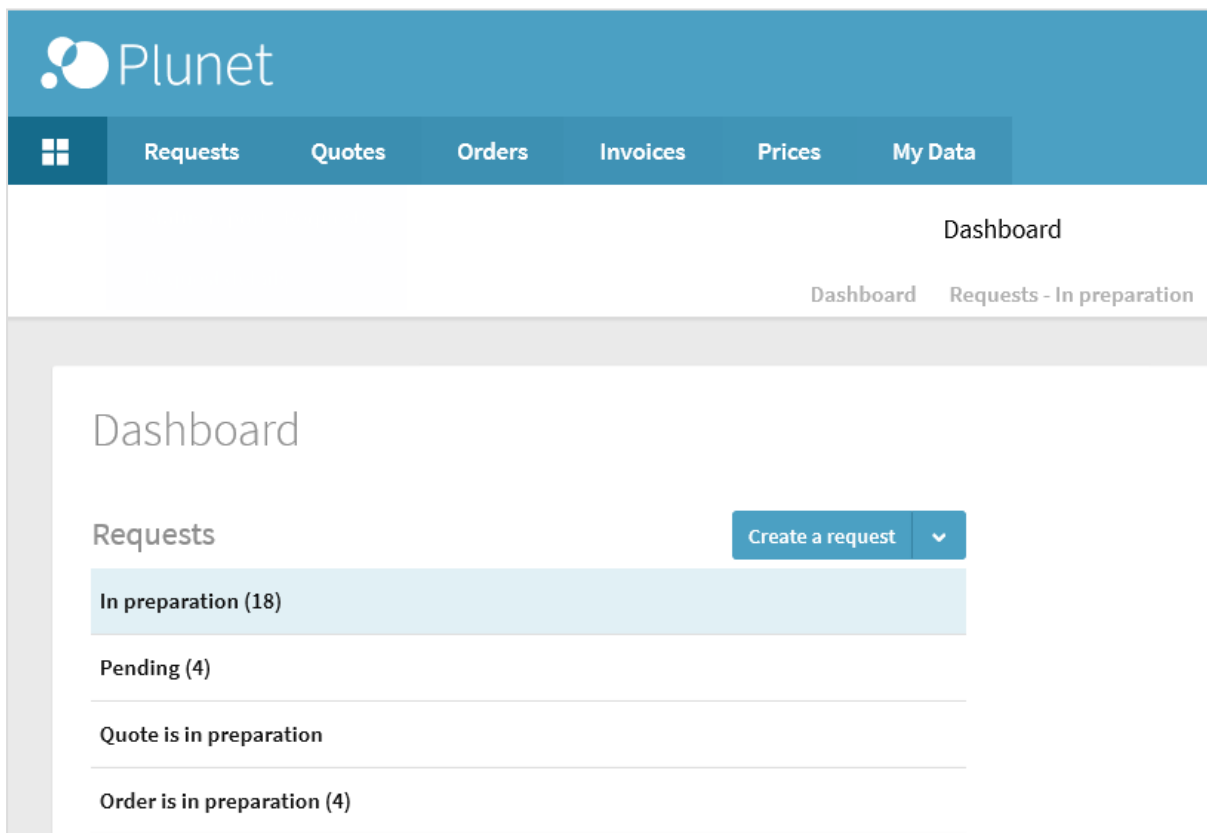lected* and *Current* lists are displayed underneath. *Last selected* shows you the data records that you have most recently viewed, while *Current* shows you the projects that still need to be worked on, sorted by project number.

Main menu

If you have the appropriate rights, you will have access to the following tabs: *Requests*, *Quotes*, *Orders*, *Prices* and *My Data*. These tabs will be described in more details below.

Dashboard

After logging in, you reach 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.
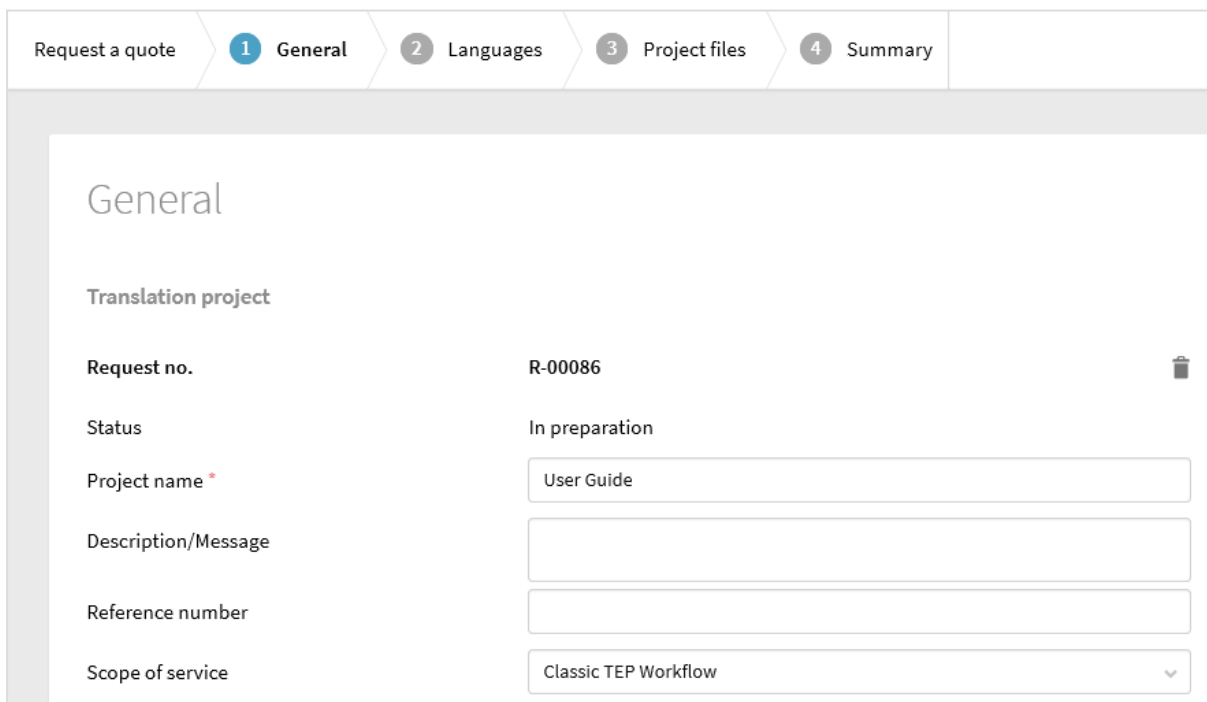
The *Dashboard* can also be reached via ⊞. This menu also contains the *Settings* page, where you can find various options for customizing Plunet BusinessManager to fit your requirements. For example, you can change your password, set your time zone or select your preferred date format.

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 *Place 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.

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.

Request a quote	① General	② Languages	③ Project files	④ Summary	

General

Translation project

Request no.	**R-00086**	🗑
Status	In preparation	
Project name *	User Guide	
Description/Message		
Reference number		
Scope of service	Classic TEP Workflow ⌄	

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.

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.

Step 3: Project files

Upload the source documents 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.

Upload files

User_Guide_EN.zip	1.40 MB	Upload	🗑

Select files...   Upload (1.40 MB)   🗑

request / R-00086 / **source** / **en**

--- Action ---   OK   Copy . Paste . Cut . Rename . Delete

☐ Name ↑	File type ↓	Created on ↓	Size ↓

This folder does not contain any files.
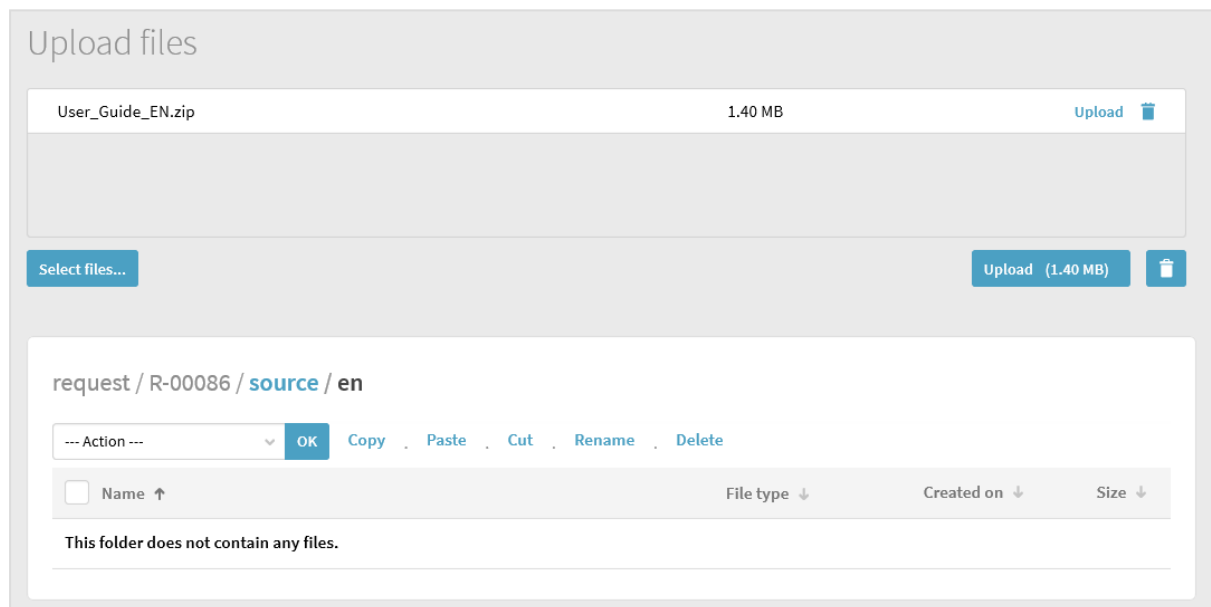
Step 4: Summary

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 *Place order* and the project manager or account manager will send you a confirmation by e-mail.

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.

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.

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*.

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.

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 into the order and enter your feedback.

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* option from the drop-down list above the *Results* table.

Result

Output - Excel ▾ [OK]

	Invoices ⬆	Invoicing date	Invoice amount	Net	Tax	Gross	Paid	Outstanding
✔	I-800053	29-02-2016	3,264.28 EUR	2,743.09	521.19	3,264.28	3,264.28	
✔	I-800052	17-02-2016	35,700.00 EUR	30,000.00	5,700.00	35,700.00	35,700.00	
✔	I-800051	16-02-2016	19,613.58 EUR	16,482.00	3,131.58	19,613.58	19,613.58	
✔	I-800050	16-02-2016	28,625.45 EUR	24,055.00	4,570.45	28,625.45	28,625.45	

Prices

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

Globetrotter International, Seattle, WA

Price lists

Select price list	Globetrotter Marketing ▾	Memo	Price list for all language combinations. Including all standard services.
		Currencies	EUR
		CAT calculation basis	Words
		Print all price lists	▾ [Print]
		Active	✔ Active
		Minimum price per item	40.00
		Price category	Marketing

Prices	English - German ▾
01	2.00 EUR per 1 Lines Translation 100% Matches
02	4.00 EUR per 1 Lines Translation 50-84% Match
03	5.00 EUR per 1 Lines Translation No Match

My Data

You can view and edit your own data in the *My Data* section. For example, you can select default contact persons, modify the contact details for your contact persons, check the company addresses and account information and manage the rights assigned to your users.

Contact persons

Contact persons	Department	Contact persons	Department
› **Cousteau, Jacques**	*No department*	› **Peters, Jason**	Sales Department
› **Luke, Lucky**	*No department*	› **Riker, William**	Sales Department

Default contact person	Santos, Maria ⌄
Default contact person for invoice	Santos, Maria (Default) ⌄
Default contact person for interpreting	Santos, Maria (Default) ⌄

✕

Creation date

Contact person status	Active ⌄ 🗑	Telephone 1	0 44 38 55 77 222 ⓢ
Form of address	⌄	Telephone 2	
Academic title		Mobile phone	
Last name	Santos	Fax	0 44 38 55 77 255
First name	Maria	E-mail	msantos@globetrotterinternatio
Opening	Dear Ms Santos	Skype contact	mariasantosg_internationa ⓢ
Login name	Globetrotter	Promotion	No ⌄

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