



Plunet BusinessManager 8.0

# Plunet vendor portal: User guide

**AUTHOR**

Plunet GmbH

## Contents

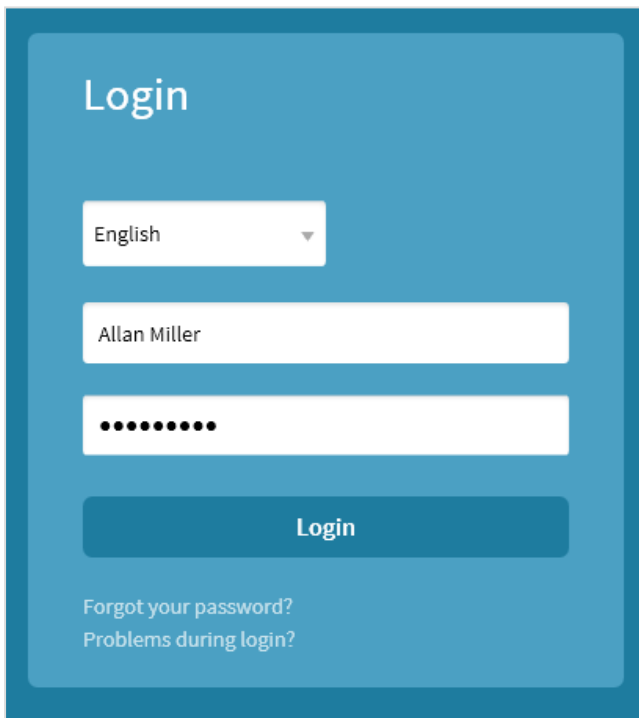
<b>Introduction</b> .....	<b>3</b>
<b>Login</b> .....	<b>3</b>
<b>Navigation</b> .....	<b>4</b>
Action bar .....	5
<b>Dashboard</b> .....	<b>6</b>
<b>Filling in your weekly schedule</b> .....	<b>6</b>
Entering absences .....	8
<b>Accepting a job</b> .....	<b>9</b>
<b>Job assignment</b> .....	<b>10</b>
Working on a job .....	11
Download source files .....	12
Deliver target files .....	12
<b>Creating invoices</b> .....	<b>13</b>
<b>Copyright Notice</b> .....	<b>15</b>

## Introduction

This guide is aimed at all users who work with the Plunet BusinessManager vendor portal. With Plunet BusinessManager you can prepare and deliver your jobs, create invoices and maintain your own data in the system. This description gives you a brief overview of the workflow in a typical job.

## Login

Enter the IP address of Plunet BusinessManager in the address bar of your web browser. Your project manager will give you this address. The Plunet BusinessManager login screen is displayed. You can now log in by entering the user name and password provided to you by your project manager.



The screenshot shows a login interface with a blue background. At the top left, the word "Login" is displayed in white. Below it is a language selection dropdown menu currently set to "English". Underneath is a white text input field containing the name "Allan Miller". Below that is a white password input field with ten black dots. A dark blue "Login" button is positioned below the password field. At the bottom left, there are two links: "Forgot your password?" and "Problems during login?".

#### 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.

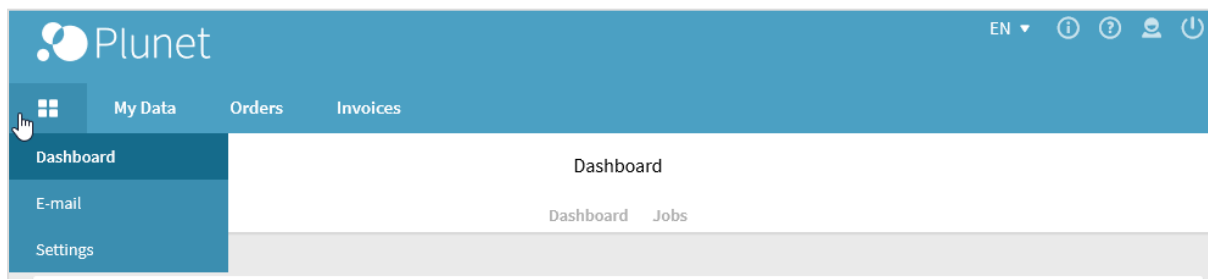
## Navigation

Plunet BusinessManager is based on web technologies and is designed in a completely browser-based manner. As a result, operation is generally similar to browsing through a website.

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. 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.

### Support

Clicking on  opens a window with a link to further information about the vendor portal.

### User

Clicking on  opens the *User* window with a link to the *Settings* page, where you can:

- Specify your availability periods by setting up the weekly schedule and entering your absences
- Make display settings, such as changing the date format or specifying the height/width of new windows
- Change your password
- Enter your e-mail settings

If you have the corresponding rights, you can also click on *My Profile* in the *User* window to open the *My Data* section. Here you can edit your contact data, view your weekly schedule and enter your working hours per month. You can also enter *Properties*, such as your areas of expertise, your source and target languages, which will be helpful to the project manager when he/she searches for resources for jobs.

### Logout

Click on  to log out of Plunet BusinessManager.

## Dashboard

After logging in, you reach the Dashboard. This page contains an overview of your jobs and invoices, organized by status. By clicking on a status (e.g. *In progress* or *Delivered*), you open a detailed list of all elements with that status.

Dashboard	
<b>Jobs</b>	<b>Invoices</b>
All (12)	All (12)
Requested (3) - Please reply	In preparation by resource (2)
Assigned - waiting	Created by resource (3)
In progress (1)	Outstanding (7) - Cleared for payment

The Dashboard can also be accessed at any time via *Home* → *Dashboard*. You can also modify your personal *Settings* or your *E-mail* configuration via this menu.

## Filling in your weekly schedule

HOME → SETTINGS → PERSONAL SETTINGS

**TIP**

Video Tutorial: [Setting Up the Weekly Working Schedule](#)

To ensure that your availability for jobs is clear, it is very important to fill in your weekly schedule with your working hours and any absences (e.g. vacations).

In your *Personal settings*, you can enter your weekly working hours and absences.


## Personal settings

### Working hours

[Manage weekly schedule](#)

### Absence

[Add absence](#)

REASON	PERIOD
Public holiday	 25-12-2020 - 25-12-2020 (All-day)

Click *Manage weekly schedule*. On the left-hand side you can select the time zone. Enter the week starting from which this schedule applies under *Schedule valid from* and click on *OK*.

To create a new schedule for the selected week, enter the working hours (from-to) and select the days of the week. You can enter any time here, as long as the total number of working hours per day is correct. The exact "from-to" working hours will be entered in your time sheet. You can also select multiple days at once.

## Weekly schedule

Resources: Miller, Allan

Schedule valid from:  [OK](#)

Time zone:  [OK](#)

New:  -  [OK](#)

Weekly schedule:  [OK](#)

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
00:00							

Click on *OK*. The times will then be displayed in gray in the table. You can adjust the working times by clicking and deselecting individual times.

08:00						
09:00	■	■	■	■	■	
10:00	■	■	■	■	■	
11:00	■	■	■	■	■	
12:00	■	■	■	■	■	
13:00	■	■	■	■	■	
14:00	■	■	■	■	■	

## Entering absences

Click on the option *Add absence*. Enter the dates, times and reason for the absence. Select *All-day* if you will be absent for the entire day or multiple days, or *Hourly* if you will be absent for a certain number of hours. You can also enter a comment or more detailed reason in the *Memo* field.

**Create absence**
✕

Reason

Vacation (Working hours)
 ▼

Memo

Type of absence

All-day
  Hourly

Period

📅 21 - 12 - 2020

-

📅 24 - 12 - 2020

Cancel
Add



## Accepting a job

You may be assigned directly to a job and can start immediately. Alternatively, it may be that the project manager sends you a request to check your availability and you will be assigned to the job once you accept the request. In some cases, the project manager may send a request to multiple linguists and the first linguist to accept the job is assigned directly.

Your current and past jobs are listed under *Dashboard* → *Jobs*. The statuses are as follows:

- *Requested* → The project manager has sent you a request about these jobs and is waiting for you to accept/decline the request.
- *Assigned - waiting* → You have been assigned to these jobs, but have not started working on them yet (for example, when you have been assigned to a proofreading job and are waiting for the preceding translation job to be completed).
- *In progress* → The jobs that you are currently working on.
- *Delivered* → The jobs that have been delivered back to the project manager.
- *Approved* → The jobs that have been approved by the project manager. If you have the corresponding right, you can create a vendor invoice for these jobs.

Click on *Requested - Please reply* to view a list of jobs that have been requested by the project manager.

Jobs - Requested

--- Options ---   [↗](#)

Job no. 📄	Description 📄	Due date 📄	Status 📄	Prices
<input type="checkbox"/> O-00087-TRA-001	Translation: English/German - Updated Manual 2016	Mon 04-04-2016	<span style="color: purple;">■</span> Requested	1,303.00 USD

When you click on a job, the job view opens as an overlay with all of the relevant data for the selected job. You can review the job details here before accepting the job. You can then confirm your availability under *Job → Specification*, accept the job and work on it right away or send your price for this job to the project manager, depending on the request.

**Confirm availability**

---

Status  Available  Conditional acceptance

Not available

Message to project manager (Optional)

---

A confirmation of your acceptance appears along with the link *E-mail to contact person*, which you can use to get in touch with the relevant contact person for this job, if necessary.

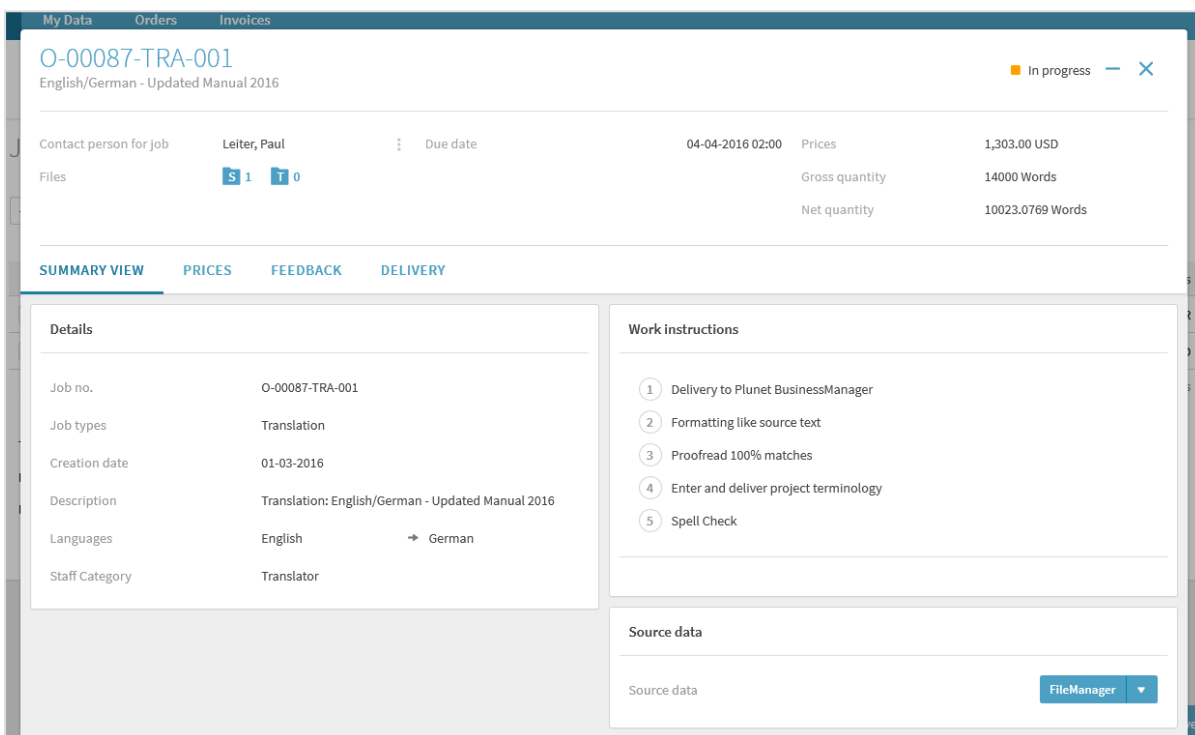
## Job assignment

As soon as a job has been assigned to you, you will receive an e-mail with all of the relevant details. The subject line contains the job number and the message body contains the details of the job. The job e-mail is also a request to log in to Plunet BusinessManager and download all of the documents required to complete the assigned job. The whole workflow is described in

detail below.

## Working on a job

You can find your job in the Dashboard under *In progress*. Clicking on the job number opens the job view in an overlay.



The screenshot shows a job view overlay for job O-00087-TRA-001. The job is titled "English/German - Updated Manual 2016" and is currently "In progress". The contact person for the job is Paul Leiter. The due date is 04-04-2016 02:00. The prices are 1,303.00 USD. The gross quantity is 14000 Words and the net quantity is 10023.0769 Words. The job is categorized as a Translator.

The job view is divided into several sections:

- Summary View:** Includes tabs for SUMMARY VIEW, PRICES, FEEDBACK, and DELIVERY.
- Details:**
  - Job no.: O-00087-TRA-001
  - Job types: Translation
  - Creation date: 01-03-2016
  - Description: Translation: English/German - Updated Manual 2016
  - Languages: English → German
  - Staff Category: Translator
- Work instructions:**
  - 1 Delivery to Plunet BusinessManager
  - 2 Formatting like source text
  - 3 Proofread 100% matches
  - 4 Enter and deliver project terminology
  - 5 Spell Check
- Source data:** Includes a FileManager button.

## Download source files

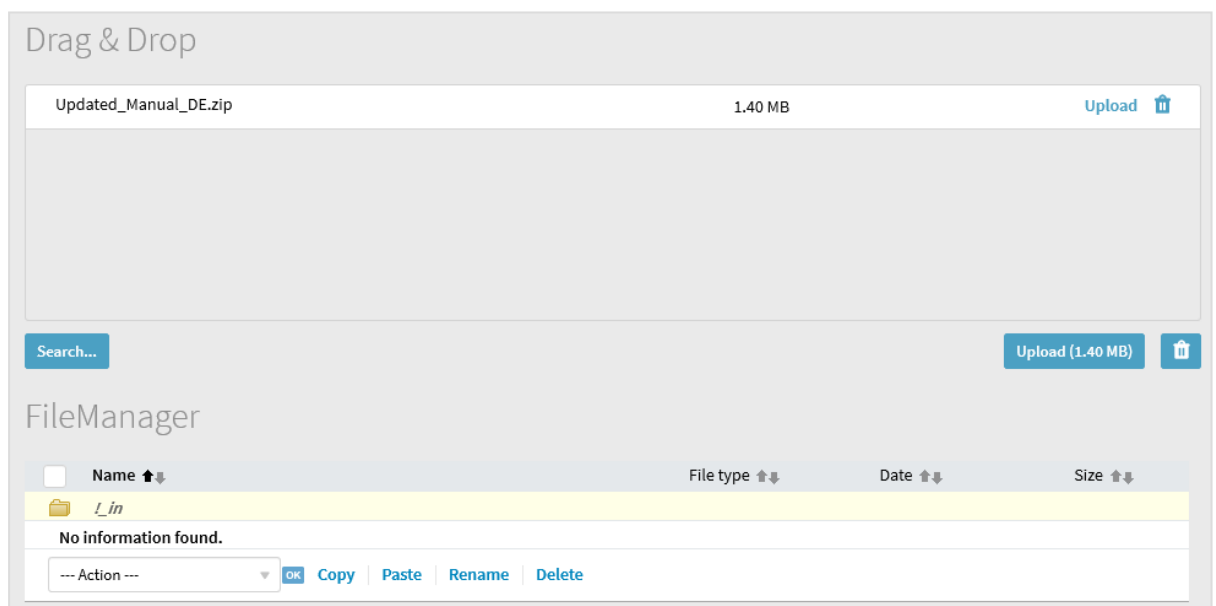
Go to the *Source files* section and click on the *Download ZIP archive* button to pick up the source files.

## Deliver target files

JOB → DELIVERY

Once you have completed the job, you can deliver the documents in Plunet BusinessManager. Open the job and go to the *Delivery* tab.

1. Under *Deliver data to server*, click on *Target files*. Upload your completed documents by clicking on *Search...* and selecting the documents. Alternatively, you can upload the files via Drag & Drop by selecting the files in your file explorer and dragging them to FileManager.



2. Click *Upload* and the data will be saved in the *!\_in* folder for your job. Once the upload is complete, you can close the window and return to the detailed view of the selected job.
3. If a checklist of work instructions needs to be completed for the job, you need to review the checklist under *Check work instructions* and save the changes before the job can be

delivered. To do so, select all of the work instructions with *Not carried out* or *Carried out*.

**Deliver data to server**

T Target data

**Check work instructions**

WORK INSTRUCTIONS	✖ NOT COMPLETED	⏪ ⏩ PLEASE SELECT	✔ COMPLETED
1 Delivery to Plunet BusinessManager	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
2 Formatting like source text	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
3 Proofread 100% matches	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
4 Enter and deliver project terminology	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
5 Spell Check	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

**Send delivery**

Note to be included with delivery

Partial delivery
Final delivery

4. Under *Send delivery* you have the option of leaving a delivery comment. Afterwards, click on either *Partial delivery* or *Final delivery*, depending on the process of the job. A message appears stating that this action will confirm the delivery of the job. The delivery date appears underneath your delivery comments. Your project manager will now receive a delivery e-mail containing the job data and your delivery comments, with either (*Partial delivery*) or (*Final delivery*) in the subject line.

## Creating invoices

If you have the corresponding right, you can create your own invoices in Plunet BusinessManager.

Once the project manager has set the status of your job to *Approved*, it will appear in your Dashboard under *Approved - please create invoice*.

An invoice can be created by selecting the relevant jobs and clicking on *Create invoice for approved jobs* underneath the list of jobs. If there are any discrepancies between the data in the

system and the your personal records, the you should contact your vendor manager or project manager.

If you have worked on jobs in different currencies, only the jobs in the same currency can be invoiced together.

After clicking on *Create invoice for approved jobs*, a new invoice opens and you can enter/modify the required information. The status of the invoice is initially *Not submitted*.

In the *General invoice data* section, you can enter your invoice number, the invoice date, and the *Payment due date*.

Invoices 0000041

*After checking all the details, please submit the invoice for approval.* [Submit for approval](#)

**General invoice data**

Internal invoice number	0000041	Status	Not submitted
Your invoice no.	<input type="text" value="P-1003"/>	Invoicing date	<input type="text" value="01 - 01 - 2017"/>
Sender	Miller, Allan	Value date	<input type="text" value="01 - 01 - 2017"/>

When you have entered all of the data for the invoice, click on *Submit for approval*. The status of the invoice changes to *Submitted for approval* and the project manager will receive the invoice by e-mail.

