



## **USER MANUAL**

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## Login

You will receive an email with your credentials for Plunet. Please change your password on first login.

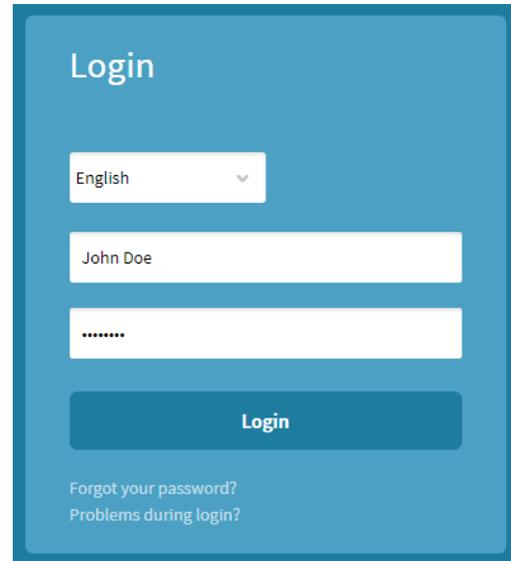
Dear John,

We have created an account for you in our Business Manager:

Plunet Business Manager:  
<http://plunet.trustedtranslations.com>

LOGIN:  
John Doe

PASSWORD:  
NDsfHvd



Login

English

John Doe

.....

Login

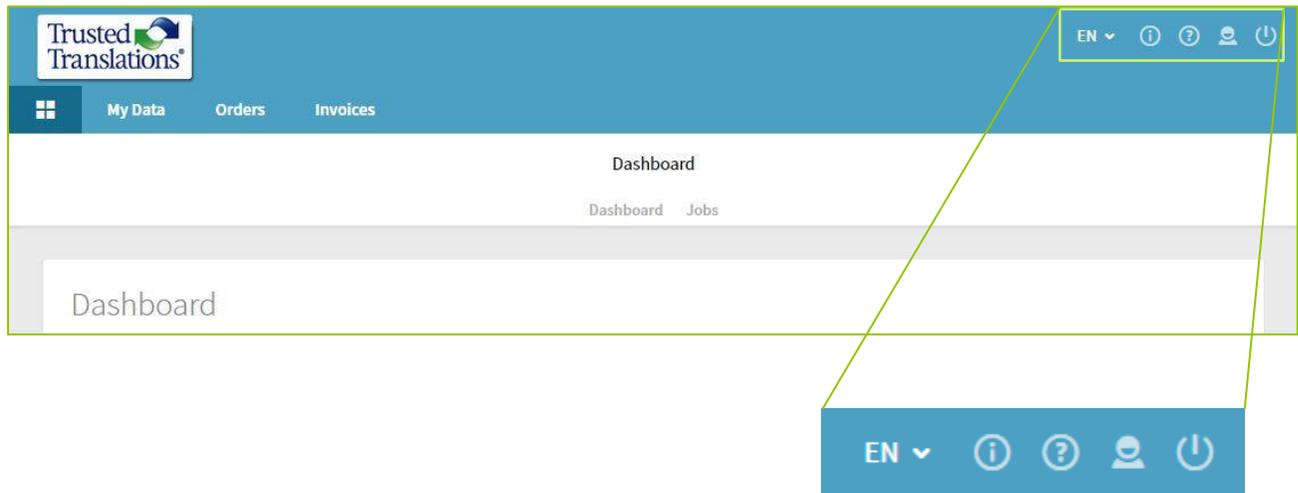
Forgot your password?  
Problems during login?

### NOTE

*If you enter the wrong password three times in a row, **your account will be automatically locked for 24 hours.***

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. To unlock your account sooner, please contact us.

## Portal Overview



 **Info:** Here you can add useful documents and links.

 **Help:** Opens a window with a link to further information about the resource login.

 **User Window:** You can access different sections in your profile:

### My Profile

- Change your contact information.
- If you are an agency, you can add, remove or update your contact persons.
- View your profile properties and your payment method.

### Settings

- Specify your availability periods by setting up the weekly planner and entering your absences.
- Change your password
- Change display settings

 **Logout**

## The Dashboard

Dashboard	
<b>Jobs</b>	<b>Invoices</b>
<a href="#">All (1)</a>	<a href="#">All</a>
<a href="#">Requested</a>	<a href="#">Not submitted</a>
<a href="#">Assigned - waiting</a>	<a href="#">Submitted for approval</a>
<a href="#">In progress</a>	<a href="#">Outstanding</a>
<a href="#">Delivered</a>	
<a href="#">Approved (1) - Please create invoice</a>	
<a href="#">Approved partial payments</a>	
<a href="#">Calculated (Job search)</a>	

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.

### Jobs

#### **Requested**

The project manager has sent you a request about these jobs and is waiting for you to accept/decline the jobs.

#### **Assigned – waiting**

You have been assigned to these jobs, but have not started working on them yet.

#### **In progress**

The jobs that you are currently working on.

#### **Delivered**

The jobs that have been delivered back to the project manager.

#### **Approved**

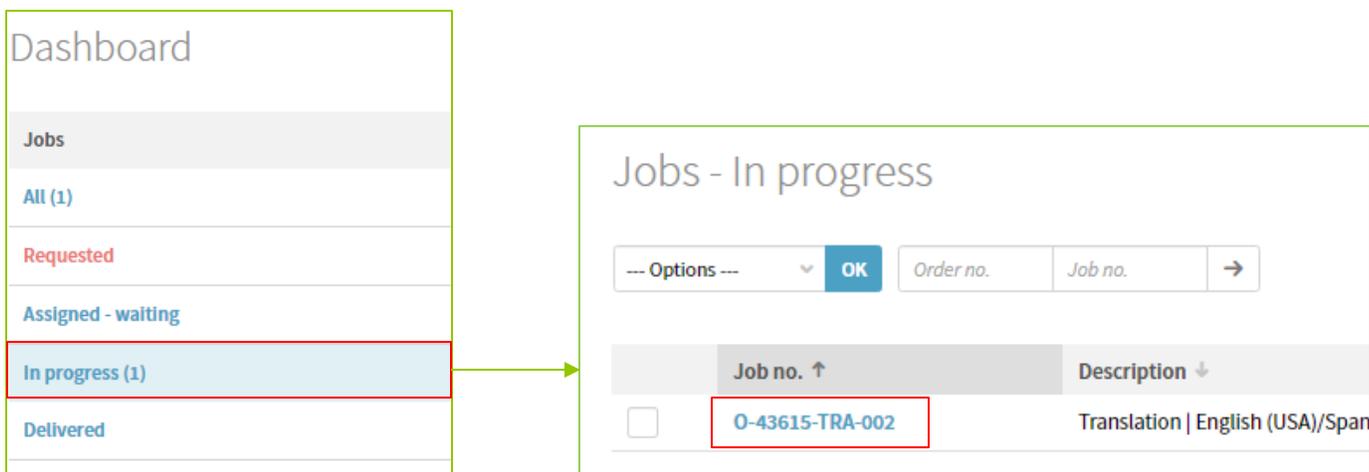
The jobs that have been approved by the project manager. If you have the corresponding right, you can create a vendor invoice for these jobs.

## Delivering a Job

Once you finish a job, you need to deliver it.

If you fail to do so, the PM will not be able to approve your job, and your invoicing might be delayed.

1. In your dashboard, under Jobs, select *In Progress*.  
Click on your order number to open the PO.



If you miss this step, the Job status will change to *Overdue*, and invoicing may be delayed.

Job no. ↑	Description ↓	Due date ↓	Status ↓
0-43615-TRA-002	Translation   English (USA)/Spanish (USA) - 134589_Total Bolivie_en-US_es-ES	Sat 02-23-2019 3:00 PM	Overdue

- In your PO, go to the *Delivery* tab.  
Complete the checklist and save the changes.

Deliver data to server

1 Target data 0

Check work instructions

WORK INSTRUCTIONS	NOT COMPLETED	PLEASE SELECT	COMPLETED
1 Language flavor used as per instructions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2 Metric, currency conversions and dates are consistent and correct as per instructions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3 Terminology and recurring phrases consistent and appropriate throughout the translated documents	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4 Instructions provided have been followed	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5 Spell checker ran on files before delivery	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
6 All possible corrections appointed in Memsources QA report have been done	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Send delivery

The job cannot be delivered. Please complete the checklist and save the changes.

Save

You will not be able to deliver the job until you complete this checklist.

- Click on Final Delivery.  
You have the option to leave a comment before delivering the job.

Send delivery

Delivery comment

Partial delivery Final delivery

Your job status will change to *Delivered*.

## Invoicing

In Plunet, you can create new invoices for finished jobs and monitor the payment status of those that have already been submitted.

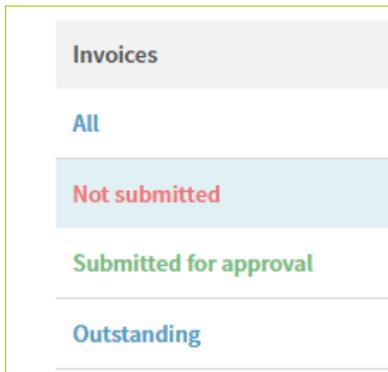
Once the project manager has set the status of your job to *Approved*, it will appear in your Dashboard under Approved. Invoices are created automatically on the 20<sup>th</sup> of every month. See [collective invoices](#).

### NOTE

*Once an invoice is created, all projects included will disappear from the Jobs menu. You will still be able to go over your delivered jobs in the Invoices section.*

## Collective invoices

On the 20<sup>th</sup> of every month, Plunet will automatically generate an invoice, including all **approved jobs**. You will receive an email stating that you have a new invoice ready for revision.



You will find this invoice under **Not submitted**.

*You will need to check all details and submit it for approval. Otherwise, it will not be processed.*

If you completed a job after that date, that job will not be included. Please remember that while you can still create invoices manually, you will not be able to create an invoice for a single job.

## Step 1

After checking all the details, please submit the invoice for approval.

**2** [Submit for approval](#)

General invoice data

Internal invoice number	0003589 	Status	Not submitted
My invoice number	<input type="text" value="1"/>	Invoice date	<input type="text" value="12 - 28 - 2018"/>
Sender	John Doe (74)	Value date	<input type="text" value="12 - 28 - 2018"/> 
Invoicing statement	<a href="#">Print invoice</a>	Payment due	02-10-2019

1. Type an invoice number.  
This number is for your own control. You can put any number you find appropriate.
2. Make sure all the items are correct and then click on *Submit for approval*

The invoice will appear in your Dashboard, under *submitted for approval*. It will remain in that status until the end of the cycle. It will then change to *Outstanding* automatically and be processed for payment.

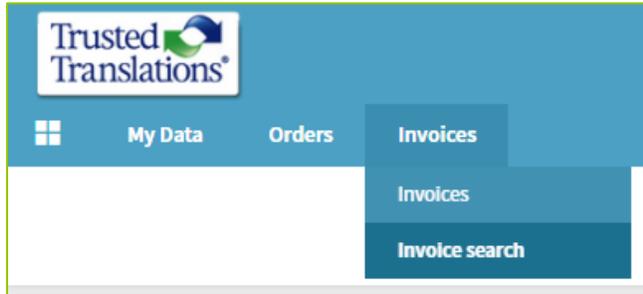
### NOTE

Paid invoices are no longer displayed in the Dashboard. However, you can still search for them in the *Invoices tab*. See [Invoice Search](#).

## Going over your Jobs and Invoices

There are several options in the platform for you to search and filter both your invoices and your orders.

### Invoice Search



Use *invoice search* to filter your invoices.

A screenshot of the 'Select' filter interface. The interface is divided into two columns: 'Description' and 'Select'. Under 'Description', there are several filter options: 'Invoice date' (with a calendar icon), 'Status', 'Invoice type', 'Additional filters', and 'Display results in' (set to 'USD'). Under 'Select', there are two date pickers showing a range from '01 - 01 - 2016' to '02 - 22 - 2019', and a dropdown menu for 'Day | Month | Year'. At the bottom, there are three buttons: 'Update search', 'Delete search', and 'Search templates'.

You can choose different dates, or even whole months or years. In addition, you can select different options from the drop-down menu:

A screenshot of the 'Select' filter interface, similar to the previous one, but with the 'Invoice date' dropdown menu open. The dropdown menu shows four options: 'Invoice date', 'Payment due', 'Date paid', and 'Value date'. The 'Invoice date' option is currently selected and highlighted in blue. The rest of the interface remains the same.

And you can filter your invoices by status.

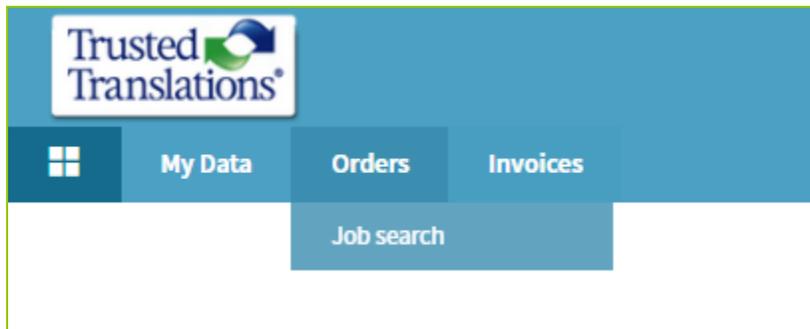
Once you get your results, you can go into each invoice and see its details.

### Result

--- Action for selection ---

Exported ↓	Creditors ↑	Invoice date ↓	Invoices ↓	Invoice amount ↓	
<input type="checkbox"/>	×	John Doe (74)	01-03-2019	<b>0003615</b>	2.40 USD

## Job Search



Use *Job search* to filter your jobs

### Select

Description	Select
Period (Job creation date)	◀ 01 - 2015 ▶ to ▶ 02 - 2019 ▶ Day   Month   Year
Job status	Please select
Status (Installment)	Please select
Display results in	USD
	<input type="checkbox"/> Display quote jobs
	<input type="button" value="Update search"/> <input type="button" value="Delete search"/> <input type="button" value="Search templates"/>

You can filter your jobs by date, and add additional filters from the drop-down menu:

Description	Select
Period (Job creation date) ▾	◀ 01 - 2015 ▶ to ▶ 02 - 2019 ▶ Day   Month   Year
Period (Job creation date)	Please select
Period (Due date of job)	Please select
Period (Job delivered on)	
Period (Invoice date)	
Period (Order date)	

You can also filter them by status:

Job status	
Status (Installment)	All
Display results in	In preparation
	Requested
	Assigned - waiting
	In progress
	Overdue
	Delivered
	Approved
	Invoice created
	Invoice checked
	Invoice accepted
	Paid
	Without invoice

Result

No results found.

These results show more details:

Result

--- Options ---  Order no. Job no. →

	Job no. ↑	Status ↓	Due date ↓	Prices ↓	Payables	Work volume
<input type="checkbox"/>	O-42224-EDT-002	■ Paid	09-04-2018 11:00 PM	4.88 USD	0003205	195 Words EDT,
<input type="checkbox"/>	O-42604-PRF-003	■ Paid	11-13-2018 10:00 AM	9.24 USD	0003205	924 Words PRF,
<input type="checkbox"/>	O-42762-TRA-004	■ Paid	11-29-2018 11:00 AM	27.89 USD	0003205	1198 Words TRA,
<input type="checkbox"/>	O-42775-TRA-003	■ Paid	12-03-2018 2:15 PM	5.50 USD	0003280	100 Words TRA,
<input type="checkbox"/>	O-42784-TRA-003	■ Paid	12-01-2018 10:00 AM	64.35 USD	0003211	1194 Words TRA,
<input type="checkbox"/>	O-42823-TRA-004	■ Paid	12-06-2018 2:15 PM	8.53 USD	0003280	155 Words TRA,
<input type="checkbox"/>	O-42830-TRA-035	■ Paid	12-07-2018 12:15 PM	15.31 USD	0003280	465 Words TRA,
<input type="checkbox"/>	O-42897-TRA-035	■ Invoice accepted	01-05-2019 2:45 PM	6.00 USD	0003636	109 Words TRA,
<input type="checkbox"/>	O-42903-TRA-012	■ Paid	12-14-2018 1:00 PM	3.30 USD	0003344	60 Words TRA,
<input type="checkbox"/>	O-42979-TRA-038	■ Paid	12-23-2018 12:00 PM	19.87 USD	0003554	729 Words TRA,

Results: 27 10 results per page 1 ... 3

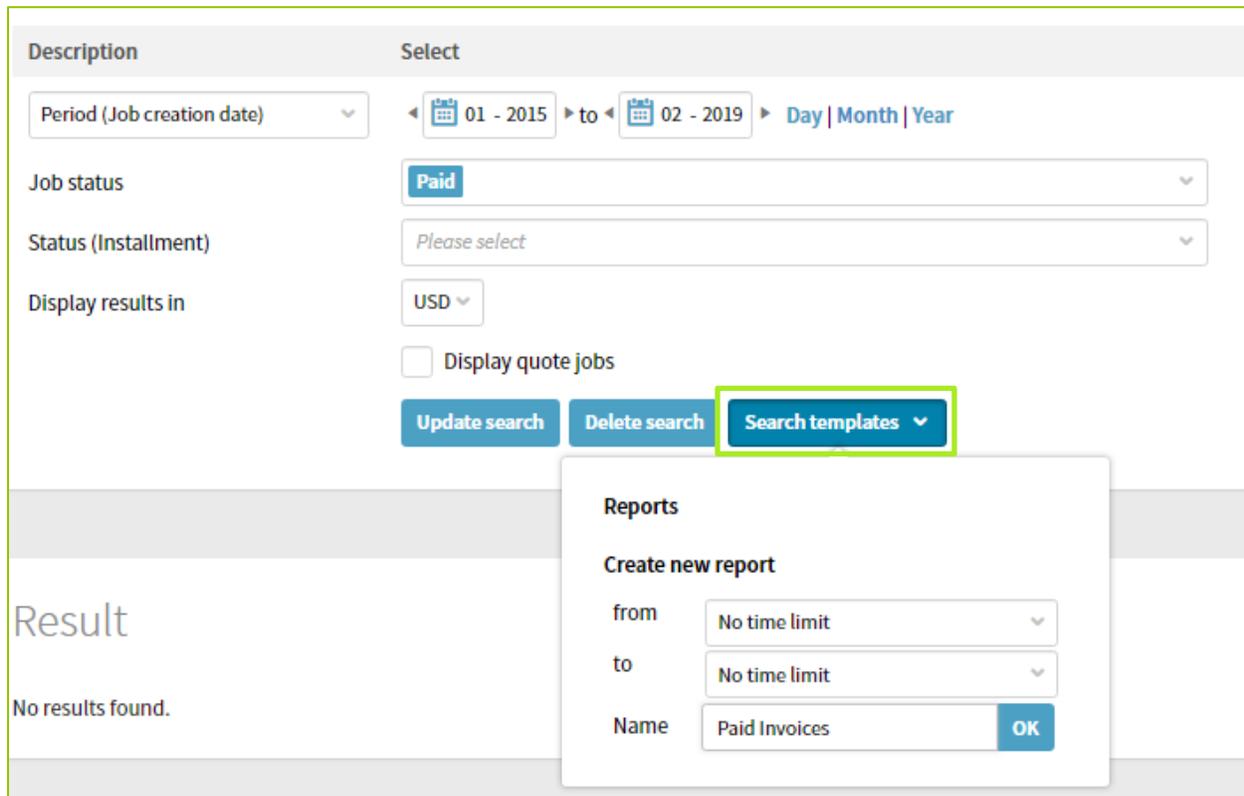
You can go into the Order, to review the tasks assigned, or you can go into the invoice itself. You will notice that several orders have the same invoice number.

You can also select the amount of rows you can see per page.

## Saving a search template

If you believe that you will be using the same search parameters often, you can create a template for later use.

Use the filters you would like to include and click on *Search templates*. You can also add a time frame to your search. Type a name and click *OK*.



The screenshot shows a search interface with the following elements:

- Description**: A dropdown menu for "Period (Job creation date)".
- Select**: A date range selector showing "01 - 2015" to "02 - 2019" with "Day | Month | Year" options.
- Job status**: A dropdown menu set to "Paid".
- Status (Installment)**: A dropdown menu set to "Please select".
- Display results in**: A dropdown menu set to "USD".
- Display quote jobs**
- Buttons**: "Update search", "Delete search", and "Search templates" (highlighted with a red box).

A modal dialog titled "Reports" is open, showing the "Create new report" section with the following fields:

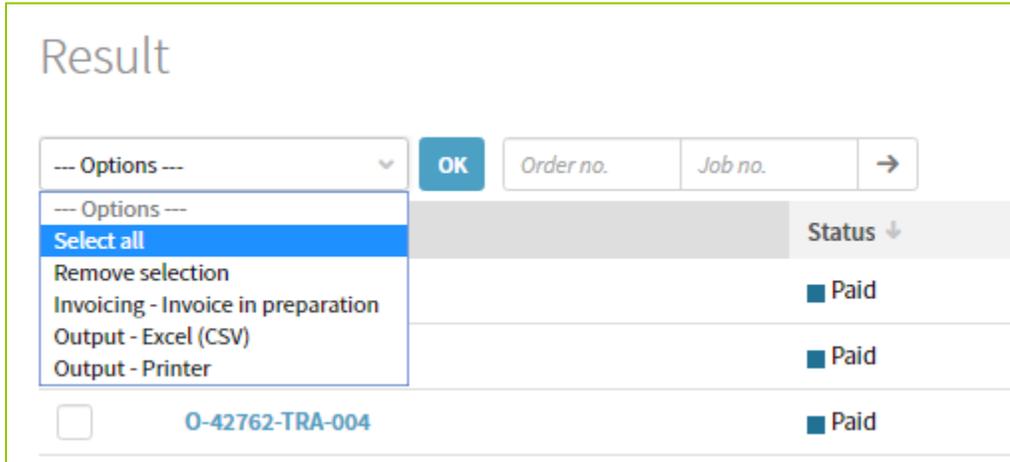
- from**: A dropdown menu set to "No time limit".
- to**: A dropdown menu set to "No time limit".
- Name**: A text input field containing "Paid Invoices" and an "OK" button.

The main interface shows "Result" and "No results found." below the filters.

You will find your saved templates by clicking on the *Search templates* button.

## Exporting Results

You can export the results in both the Invoice search and the Job search. To do so, use the *Options* drop-down menu:



The screenshot shows a table titled "Result" with a search bar and an "Options" dropdown menu. The search bar contains "Order no." and "Job no." with an "OK" button and a search icon. The table has a "Status" column with a downward arrow. The "Options" menu is open, showing the following options: "Select all", "Remove selection", "Invoicing - Invoice in preparation", "Output - Excel (CSV)", and "Output - Printer". The table contains three rows, all with a "Paid" status. The first row has a checkbox and the ID "O-42762-TRA-004".

Result	
Order no.	Job no.
<input type="checkbox"/>	O-42762-TRA-004
	Paid
	Paid
	Paid

Choose *Select all* first, and then click OK, to select all the rows in that page quickly.

Then, choose *Output* (the one of your preference), and then click OK.