

Client Portal Manual

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1. GENERAL INFORMATION

1.1. Introduction

With World Translation's client portal, you can easily request translations, transfer documents in a secure way, accept quotes, and get an overview over your current and previous orders.

The client portal is part of World Translation's project management system, Plunet BusinessManager. Use of the portal is free of charge and does not require any installation.

This manual gives you a brief overview over the most important functions.

1.2. System Requirements

Please refer to our separate document for system requirements.

1.3. Recommended Browser Settings

Please refer to our separate document for recommended browser settings.

1.4. Security

The client portal is accessed via a secure HTTPS connection. All data is stored on a server located on our premises in Denmark. There is a backup of data on two different locations every night.

1.5. Interface Languages

The client portal interface is currently available in English and German. You can change the language settings after the login.

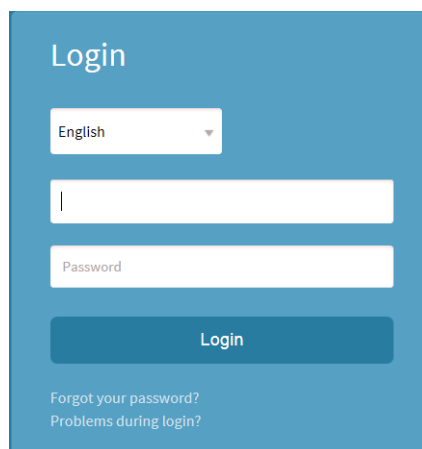
2. LOGIN

2.1. Login

Enter the link for our client portal in the address bar of your browser:

<https://plunet.worldtranslation.dk>.


The login screen is displayed. You can now log in by entering the user name and the password provided by World Translation.

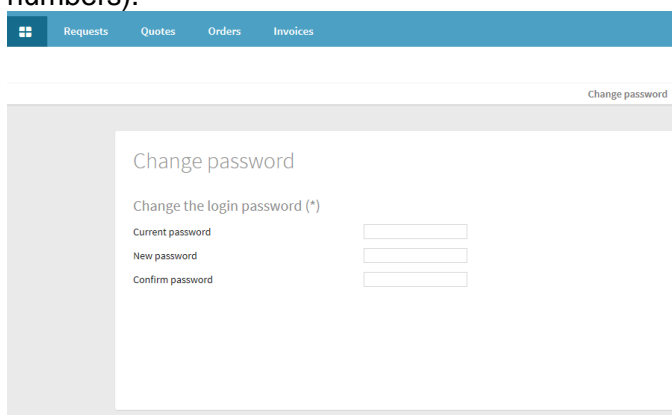


The client portal interface is currently available in English and German. You can change the language settings after the login.

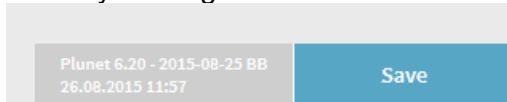
2.2. Changing your password

When you use the client portal for the first time, you are asked to change your password.

- Click the Home icon () and select Settings
- Enter the password provided by us and a new password of your choice (8 characters, including numbers).



- Save by clicking on "Save" in the lower right corner of the client portal.




NOTE

If you use the wrong password for login three times in a row, your account will automatically be locked for 24 hours. To unlock the account earlier, please contact us.

Never disclose your password to other people, and as a rule don't use public computers to log onto the client portal.

2.3. Leaving the Client Portal

You can leave the client portal at any time by clicking on the "Logout"-symbol in the top-right corner of the navigation toolbar (.

You will be automatically logged out after 30 minutes of inactivity.

2.4. Support

If you have forgotten your password, please click on "Forgot your password?" on the client portal login page (where you usually would enter your user name and password) and follow the instructions to receive a new password.

If you should experience other problems with the client portal, please contact World Translation.

3. DASHBOARD

The first page you will see when you log in is your **Dashboard** with a basic overview. The dashboard displays all your requests, quotes, orders and invoices in compressed form.


By clicking on one of the categories (e.g. "Orders | In progress"), you see more detailed information (you are still on the same page as before in the summary view, just further down on the page).

Dashboard

Requests	Create a request
In preparation	
Pending	
Quote is in preparation	
Order is in preparation	

Quotes	
Pending (3)	EUR 3.779,89
Accepted	EUR 0,00
Rejected (3)	EUR 1.470,14
Expired	EUR 0,00

Orders	
In progress (45)	EUR 35.421,90
Delivered documents (152)	EUR 15.999,86

You can always return to the dashboard by clicking the home button () and selecting **Dashboard**.

Depending on your access rights, the dashboard either shows requests, quotes, orders and invoices for you and your colleagues, or just the ones that you are responsible for. If you want this to be changed, please contact your project manager at World Translation.

4. PLACING A REQUEST OR AN ORDER

On the dashboard, you can request a quote or directly place an order.

Dashboard

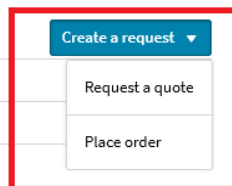
Requests

In preparation

Pending

Quote is in preparation

Order is in preparation



If you would like to receive a quote, please click on “Request a quote”.

If you would like to directly place an order without receiving a quote first, please click on “Place order” (you can still receive an overview over the prices).

You are automatically led to the **Requests** tab.

The creation of a request involves four steps:

1. General
2. Languages
3. Project files
4. Summary

Step 1: General:

Your new request automatically gets a Request number, e.g. R-01475. The status of the request is "In Preparation"; this will change when you submit the request to World Translation.

In this step, you can fill out the following fields:

- **Project name (mandatory)**

Please enter a project name for your request, e.g. "Translation of printer manual".

- **Description/Message (optional)**

Please enter any relevant information or instructions (the kind of information you usually would provide in an e-mail to World Translation). You can write the message in the language you usually use to communicate with your project manager.

You do not need to enter the required language combinations here, since this is done in step 2 of the request.

- **Reference number (optional)**

If you want us to use a reference number for this project (e.g. your own SAP number), you can enter this here.

- **Rush Request (optional)**

If you want us to process the request as a rush request, please tick this field

- **Start date (optional)**




You may set a start date for the order that is different from today's date (e.g. if the order cannot be started immediately because you do not have the final version of the documents yet). In most cases this is not relevant.

- **Requested delivery date (optional)**

Please enter the desired delivery date for the translation.

General

Translation project

Request no.	R-01487
Status	In preparation
Project name *	Translation of printer manual
Description/Message	Please translate the 2 documents and also provide PDFs. The graphics do not need to be translated.
Reference number	
Requirements	<input type="checkbox"/> Rush request
Time zone	UTC +01:00 CET 
Creation date	22.03.2017 08:38
Due dates	
Start date	 dd.MM.yyyy HH:mm
Requested delivery date	 31.05.2017 HH:mm

[2. Languages →](#)

- **Further options**

There might be further (customer-specific) options for you to choose. Please contact World Translation if you have any questions.

Move to the next step by clicking "2. Languages" at the bottom.

Step 2: Languages

Languages

Please select the source language and the target language(s) from the dropdown lists.

Please note that you always need to choose the required language variant, e.g. "Portuguese (Portugal)" or "Portuguese (Brazil)".

You can choose several target languages at the same time.

For translations with English as the source language, please choose "English (UK)" (this is relevant for the following process steps).

NOTE:

After selecting the languages in the dropdown lists you have to confirm the selection by clicking on "Add" next to the selected languages. Otherwise the system doesn't remember your selection.

Languages

Language combination	Requested delivery date
No language combinations have been selected yet. Please select at least one language combination.	
<div style="display: flex; align-items: center;"> <div style="border: 1px solid #ccc; padding: 2px; margin-right: 5px;">English (UK)</div> <div style="margin: 0 5px;">→</div> <div style="border: 1px solid #ccc; padding: 2px; display: flex; gap: 5px;"> German (Germany) Danish Czech </div> <div style="margin-left: 5px; border: 1px solid #007bff; padding: 2px 5px; color: #007bff;">Add</div> </div> <div style="margin-top: 5px;"> <input type="checkbox"/> There are different source files for each language combination <div style="margin-left: 10px; color: #007bff;">★ Set language combination(s) as default.</div> </div>	

- EN - bruges ikke
- English (Australia)
- English (Canada)
- English (Ireland)
- English (New Zealand)
- English (Republic of the Philippines)
- English (South Africa)
- English (USA)
- Estonian
- Faroese
- Filipino
- Finnish
- French (Belgium)
- French (Canada)
- French (France)

If you click on "Set language combination(s) as default" at the bottom, the current language combinations will be preselected for all new requests. In all new requests, you can always delete the language combinations that are not relevant for the specific project by clicking the trash can icon next to the language combination:

English (UK)

Danish

. .

☰

☒

Move to the next step by clicking '3. Project files' at the bottom.

Step 3 Project files

This is where you should upload the relevant documents.

Please click on the FileManager icon to upload the documents you want us to translate ("Upload source documents") and/or any reference material such as glossaries or earlier translations ("Upload reference material").

Project files

Upload source documents

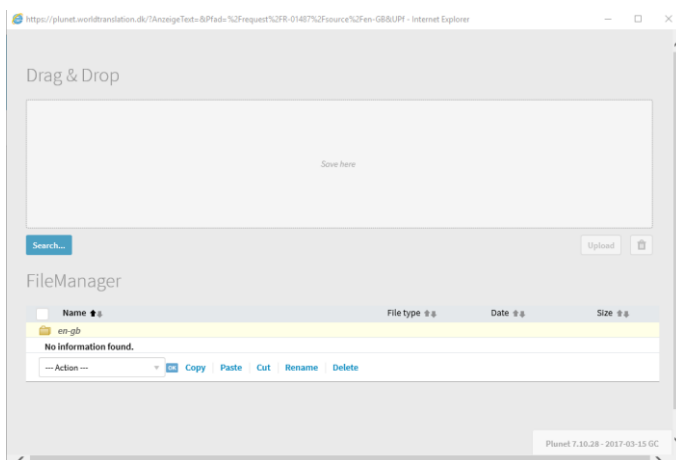
Source folder  0

Upload reference material

Reference folder  0

[Back](#) [4. Summary →](#)

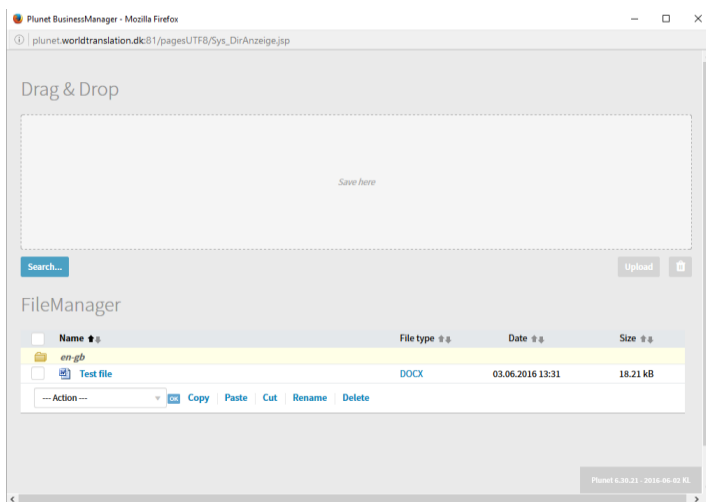
A new pop-up window appears.



In this window, you can either drag&drop the relevant files to the window or you can browse for the files by clicking on "Search". If you browse for the files you can choose one or more files, and then click on "OK".

After that please click "Upload" to upload the files to our server.

You can now see the files in the File Manager:



You can now close the pop-up window.

Move to the next step by clicking "4. Summary" at the bottom.

Step 4 Summary

This step gives you an overview of the data you have entered in steps 1-3, and if you need to change anything you can also edit it from here:

Summary

General

Translation project

Request no.	R-01487
Status	In preparation
Project name *	Translation of printer manual
Description/Message	Please translate the 2 documents and also provide PDFs. The graphics do not need to be translated.
Time zone	UTC +01:00 CET
Creation date	22.08.2017 08:38
Due dates	
Start date	
Requested delivery date	31.05.2017

Languages

Language combination	Requested delivery date
en-GB > cs-CZ	31.05.2017
en-GB > da-DK	31.05.2017
en-GB > de-DE	31.05.2017

Project files

Upload source documents

Source folder  1

Upload reference material

Reference folder  0

At the bottom, you can fill out the following fields:

- **Due date (quote) [optional]**

[only available if you chose "Request a quote"]

You may enter the date where you wish to receive the quote from World Translation. Please note: this is not the due date for the translations.

- **Send request confirmation to [mandatory]**

Here you can enter the e-mail-address for the request confirmation. You should enter your own e-mail-address under "Send request confirmation to". If required, you can enter an additional address in the field below.

Send request

Due date (quote)

Send request confirmation to *

Additional recipients for project e-mails

Once you have filled out all required information, please click on "Request a quote" or "Place order" (depending on which option you chose in the beginning).

Your project manager at World Translation will automatically be notified of your request and will process it as quickly as possible.

If you requested a quote, your Project Manager will send you an email once the quote is prepared. You can either accept or reject the quote by email, or you can do this directly within the client portal (see chapter 5).

5. ACCEPTING OR REJECTING A QUOTE

You can accept or reject quotes by email or within the client portal.

On the dashboard, you can find your requested quote under **Quotes | Pending**.

You can accept or reject the quote directly from the dashboard by clicking on the "Pending" line, which gets you to the detailed view of pending quotes.

You can use the options in the "Status" column to place the order or reject the quote. An email will be sent to World Translation's Project Manager.

Quotes - Pending

Quotes	Project manager	Project name	Quotation date	Expiry	Status	Prices	Upload
Q-08715-01	Lyngholm Eriksen, Stine	Translation of printer manual	03.06.2016	03.07.2016	Pending	1.000,00 DKK	Place order Reject quote

You can also click on the quote number (e.g. Q-04916-01), look through the quote and accept or reject it there.

Items

Currencies DKK [Item overview](#) >> >>

Results: 3 5 results per page 1

001	Translation of printer manual - Engelsk (UK)/Tjekkisk	Σ 1.599,00	Due date	31.05.2017																									
<table border="1"> <thead> <tr> <th>QUANTITY</th> <th>PRICE UNIT</th> <th>UNIT PRICE</th> <th>PRICES</th> <th>TYPE</th> </tr> </thead> <tbody> <tr> <td>1230</td> <td>Word(s) Translation No Match</td> <td>1,30</td> <td>1.599,00</td> <td>Tax 1</td> </tr> </tbody> </table>		QUANTITY	PRICE UNIT	UNIT PRICE	PRICES	TYPE	1230	Word(s) Translation No Match	1,30	1.599,00	Tax 1	Language		English (UK) - Czech															
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002	Translation of printer manual - Engelsk (UK)/Danak	Σ 3.030,07	Due date	31.05.2017																									
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003	Translation of printer manual - Engelsk (UK)/Tysk (Tyskland)	Σ 0,00	Due date	31.05.2017																									
		Tax 1	Language		English (UK) - German (Germany)																								

Results: 3 5 results per page 1

Net price 4.629,07 DKK

Services
No services have been specified.

[Reject quote](#) [Place order](#)

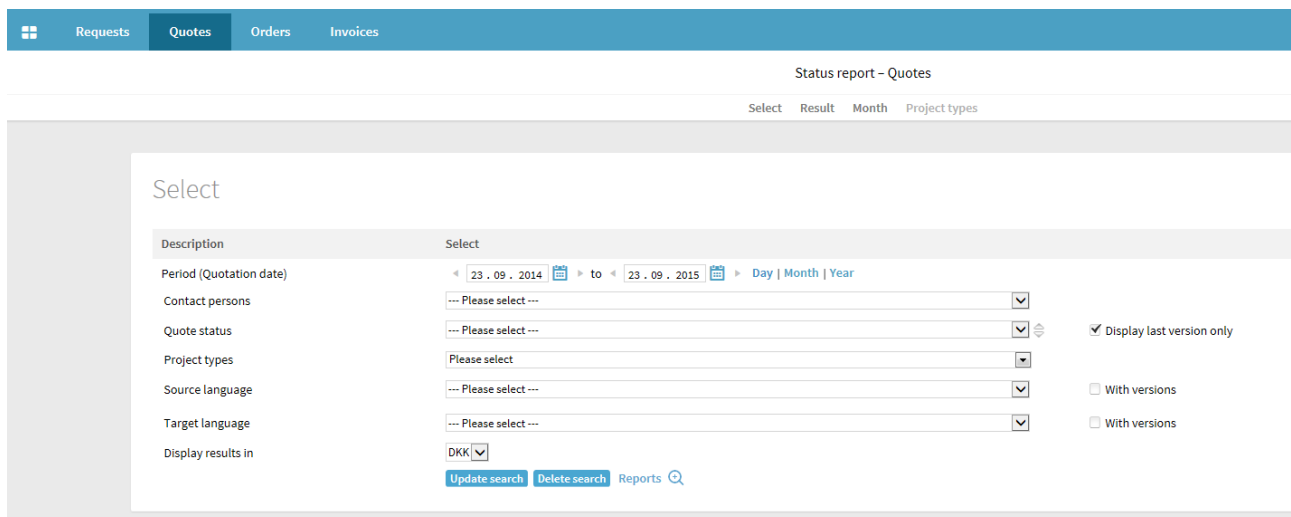
6. ONGOING ORDERS AND DELIVERIES

You can follow the status of your orders in the client portal – see chapter 8.

Once a project is finished, your Project Manager will send you an e-mail that either contains an attachment with the translated documents, or a link that you can use to download the documents. Alternatively, you can log onto the client portal, access the relevant order via the dashboard, and download the documents via the File Manager.

7. BROWSING QUOTES

You can browse through your quotes by clicking on the **Quote** tab and clicking on **Status Report - Quotes**. You have multiple search functions for finding the quotes you have received (click on "Update search" to start the search). If you click on a quote number, you will get directly to the specific quote and can see all details.



The screenshot shows the 'Status report - Quotes' page in a client portal. At the top, there is a navigation bar with tabs for 'Requests', 'Quotes', 'Orders', and 'Invoices'. Below this, the page title is 'Status report - Quotes'. There are several tabs: 'Select', 'Result', 'Month', and 'Project types'. The main content area is titled 'Select' and contains a search form with the following fields and options:

- Description**: Select
- Period (Quotation date)**: A date range selector showing '23 . 09 . 2014' to '23 . 09 . 2015' with a 'Day | Month | Year' format selector.
- Contact persons**: A dropdown menu with the text '--- Please select ---'.
- Quote status**: A dropdown menu with the text '--- Please select ---'.
- Project types**: A dropdown menu with the text 'Please select'.
- Source language**: A dropdown menu with the text '--- Please select ---'.
- Target language**: A dropdown menu with the text '--- Please select ---'.
- Display results in**: A dropdown menu with 'DKK' selected.

On the right side of the search form, there are two checkboxes: 'Display last version only' (checked) and 'With versions' (unchecked).

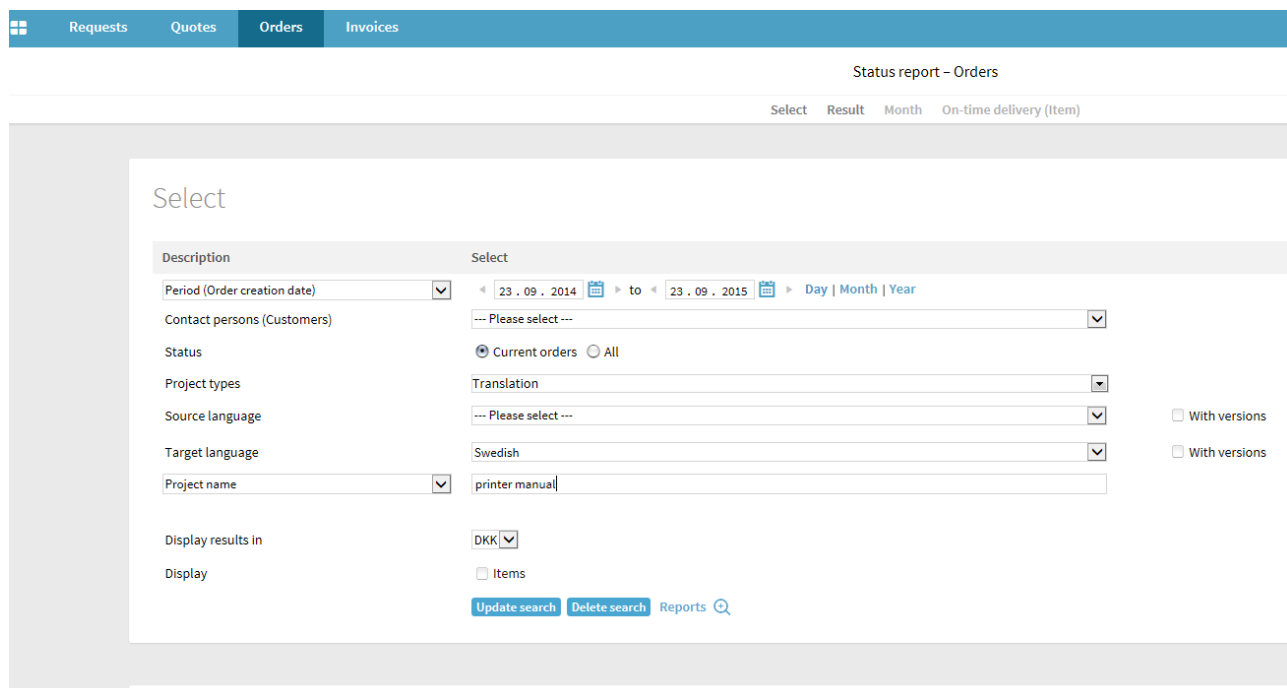
At the bottom of the search form, there are three buttons: 'Update search', 'Delete search', and 'Reports' with a magnifying glass icon.

8. BROWSING ORDERS

You can browse through your orders by choosing **Status Report - Orders** on the **Orders** tab. You have multiple search functions for finding orders, creating reports for total revenue, revenue per language etc. Once you have chosen the required settings, click on "Update search" to start the search.

If you click on an order number, you will get directly to the specific order and can see all details.

If you need more detailed instructions on the search options, please feel free to contact us.



9. BROWSING INVOICES

You can browse through your invoices by choosing **Status Report - Invoices** on the **Invoices** tab. You have multiple search functions for finding the invoices you have received (click on "Update search" to start the search). If you click on an invoice number, you will get directly to the specific invoice and can see all details.