Plunet Business Manager

Freelancer Login Manual

Introduction

This brief manual is aimed to help all Service Providers who work with Plunet Business Manager over the Freelancer Login. Business Manager helps you accept, track, deliver and invoice your jobs. This manual gives you a brief overview of the interface and the workflow of a typical job.

First, go to the website, enter your email address and click on "*forgot your password?*" in order to get and email with your log in access credentials.

To log in visit: https://mcis.plunet.com

Follow the instructions in the email you received to get your new password.

You can follow the same process if you forget your password in the future.

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 luisa@mcis.on.ca

Personal settings Menu

Under **Home | Settings** you can:
- ✓ Specify availability periods
- ✓ Change the login password
- ✓ Miscellaneous: changes in this section are **optional**: you can change the color of the interface and the date format display.

Under the **My Data** menu, you will find your contact information, address, calendar, and payment method.

We kindly ask you to inform us if your address needs to be changed and if your payment method is not properly set up in the system.

The Contact person section is only to be used to registered vendors (agencies) with more than one contact.

You can also create absence times from **My Data** tab.

You can also enter these sections from the action bar located on the top right corner

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 that MCIS may share when needed.

Support

Clicking on opens a window with a link to further information about the resource login.

User

Clicking on opens the *User* window. Click on *My Profile* to open the *My Data* section, where you can edit your contact data and view your weekly planner.

Dashboard

Home | Dashboard, 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

Jobs		Invoices
All (12)		All
Requested (1) - Please reply		Not submitted
Assigned - waiting		Submitted for approval
In progress		Outstanding
Delivered (2)		
Approved (9) - Please create invoice		
Approved partial payments		
Calculated (Job search)		

Accepting a job

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

1. *Requested →* The project manager has sent you a request about these jobs and is waiting for you to accept/decline the jobs. There are 2 types of request that you can receive from the project coordinator: you can be requested to reply if you are available to work on the project and also to provide the rate that you would charge for the project. You can accept or reject the request.

   You will receive an email with the details of the request, # of words, deadline, etc. You have to log in to your account to be able to check the source files and reply to your project manager.

When you click on a job, the job view opens as an overlay with all of the relevant data for the selected job.

O-0001-000002-TRA-001
ENGLISH/FRENCH - CANADIAN - - COPY

■ Requested — ✕

Contact person for job	Cano (PM), Luisa		Start date	2017-03-03 11:30AM	Prices	36.00 CAD
Files	S 1		Due date *	2017-03-06 10:00AM	Gross quantity	300 Words
					Net quantity	300 Words

Find the source document(s) here

SUMMARY VIEW   PRICES   CAT WEB EDITOR

Details

Job no.	O-0001-000002-TRA-001
Job types	Translation
Creation date	2017-03-03
Company code (invoice)	Company
Description	Translation: ENGLISH/FRENCH - CANADIAN - - COPY
Languages	ENGLISH → FRENCH - CANADIAN

Work instructions

1. Review the project contract/purchase order and notify the Project Coordinator if something needs to be modified.
2. Make sure you have all materials and details needed in order to start your task, such as glossaries, reference materials or style guides.
3. Review the source files before accepting a translation project, in order to ensure you are comfortable with the material, ensure that the document is legible and that you can meet the deadline.
4. Review and follow all instructions sent by the Project Coordinator for the specific project including: instructions about formatting, the content, correct name spelling of a client and any other specification from the client.
5. Overwrite source text and follow the same formatting
6. Spell check
7. If you are working with different language scripts, please upload an embedded word file and a PDF.
8. We also expect you to review the reviser's feedback. Please plan to be available for this task in the period following the submission of the translation. If you will not be available, let us know before accepting the assignment.
9. Ask the Project Coordinator if you have any questions.
10. Inform the Project Coordinator immediately if you are experiencing any issues that can impact delivery on time.

Source data

FOLDER

S Source data ⌄   1   Download ZIP archive

Find the source document(s) here

Confirm availability

Status	● Available ○ Conditional acceptance
	○ Not available
Message to project manager (Optional)	Message to project manager (Optional)

Confirm your availability for the job by selecting one of these options. Note that you can send a brief message to your project manager if needed

Confirm your availability and send your response

Send

NOTE: Never start the project before you receive an email notification with the **job assignment notification** with the Purchase Order (PO) attached.

2. *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 the second job in the job chain and are waiting for the previous job to be completed).

3. *In progress* → The jobs that you are currently working on.

4. *Delivered* → The jobs that have been delivered back to the project manager.

5. *Approved* → The jobs that have been approved by the project manager and **you can create a vendor invoice for these jobs.**

Job assignment

Once you accept, the project manager will then assign the job to you. You will receive an e-mail with all of the relevant details. The subject line contains the order reference number and the message body contains the details of the job. The e-mail is also a request to log into 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.

✓ Check the job delivery date.

✓ Review the work instructions.

✓ Download source files from the file manage in the source data section. In the detailed view of the selected job, go to the *Source data* section and click on the "Source folder*"* button to pick up the source documents.

✓ **Deliver target document:**

1. Under *Delivery → Deliver data to server*, click on the "Target data" or on the "upload files" button. 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 into the dotted area in FileManager.

O-2016-080057-TRA-001
ENGLISH/ARABIC - Version1 Eating well

■ In progress — ✕

Contact person for job	Cano (PM), Luisa	⋮	Start date	2016-09-02 8:30AM	Prices	30.00 CAD
Files	S 1 T 1		Due date *	2016-09-02 9:45AM	Gross quantity	300 Words
					Net quantity	300 Words

SUMMARY VIEW   **PRICES**   **DELIVERY**

Deliver data to server

Deliver data to server

FOLDER   ...

T Target data ▾   0   **Upload files**

WORK INSTRUCTIONS	✕ NOT CARRIED OUT	‹ › PLEASE SELECT	✓ CARRIED OU
1 Review the project contract/purchase order and notify the Project Coordinator if something needs to be modified.	○	○	✅
2 Make sure you have all materials and details needed in order to start your task, such as glossaries, reference materials or style guides.	○	○	✅
3 Review the source files before accepting a translation project, in order to ensure you are comfortable with the material, ensure that the document is legible and that you can meet the deadline.	○	○	✅
4 Review and follow all instructions sent by the Project Coordinator for the specific project including: instructions about formatting, the content, correct name spelling of a client and any other specification from the client.	○	○	✅
5 Overwrite source text and follow the same formatting	○	○	✅
6 Spell check	○	○	✅
7 If you are working with different language scripts, please upload an embedded word file and a PDF.	○	?	○
8 We also expect you to review the reviser's feedback. Please plan to be available for this task in the period following the submission of the translation. If you will not be available, let us know before accepting the assignment.	○	?	○
9 Ask the Project Coordinator if you have any questions.	○	?	○
10 Inform the Project Coordinator immediately if you are experiencing any issues that can impact delivery on time.	○	?	○

Send delivery

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

Save

Drag and drop your documents into the Target data folder, click on "upload" and close the window

Drag & Drop

Updated_Manual_DE.zip	1.40 MB	Upload 🗑

Search....   Upload (1.40 MB)   🗑

FileManager

☐ Name ⬆⬇	File type ⬆⬇	Date ⬆⬇	Size ⬆⬇
📁 ..in			
No information found.			

--- Action --- ▾ OK Copy | Paste | Rename | Delete
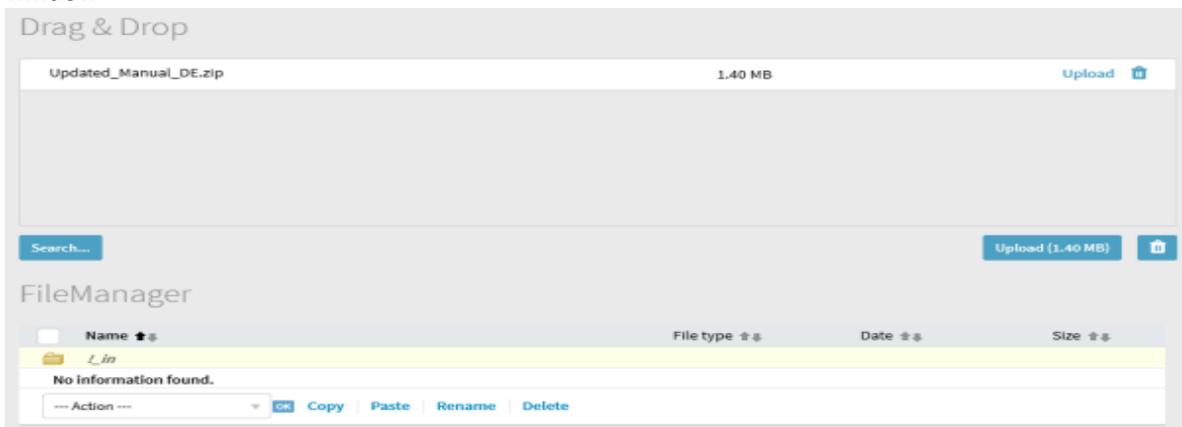
2. Click *Upload* and the data will be saved in the *"Target"* folder for your job. Once the upload is complete, you can close the window and return to the detailed view of the selected job. Check all of the work instructions with *Not carried out* 🔴 or *Carried out* ✅.

3. Under *Delivery → Send delivery* you have the option of leaving a delivery comment. A message appears stating that this action will confirm the delivery of the job. Confirm with *OK*. 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.

Locked Projects

As MCIS often works with multilingual projects, where several translators are working on the same project, they system protects the integrity of the information by only allowing one user to make changes to the same project at the same time. So, on rare occasions, it may happen that you see the project locked by another user. This is indicated by the red lock next to the project number:

When the project is locked, you will not be able to save any changes or upload documents.

In order to unlock the project, all you need to do is click on the red lock. A confirmation message will pop up asking if you if you are sure you want to unlock.
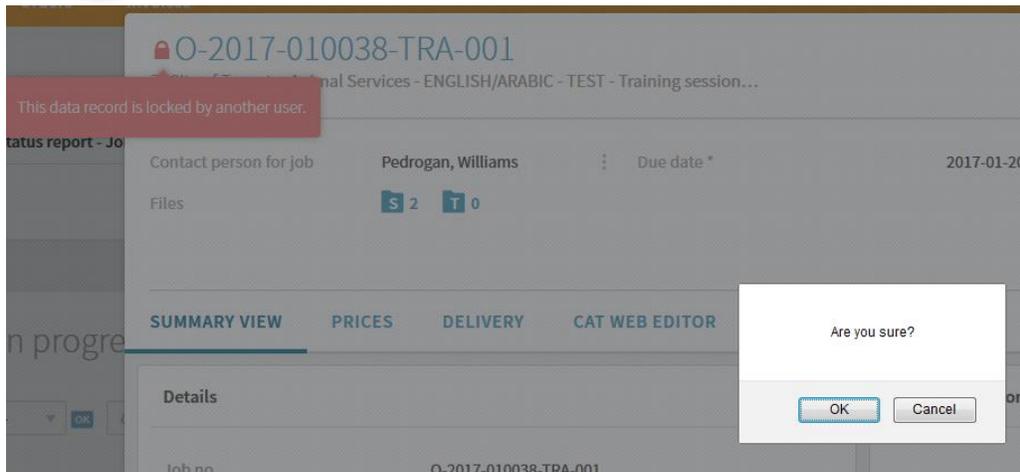
Click yes, and you will be able to edit the project. You will also notice that the red lock has disappeared.

Creating invoices

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 in the "*Job – Approved*" section. After clicking on "*Create invoice for approved jobs*", the status of the invoice is initially "*In preparation*".

Click on the document button next to "*Invoices*" to create a copy of the invoice for your own records. When you have entered all of the data for the invoice, click on *OK* button next to "*Release invoice for checking*". The status of the invoice changes to "*Created by external user*" and the project manager will receive the invoice through the system.

NOTE: Always click on release invoice; otherwise MCIS will not receive it.

Submit your invoice

Click on submit for approval: you can get a copy of the invoice by clicking on: "Print invoice statement"