



# Plunet BusinessManager

*The business and translation  
management system of your choice*

November 2023

[www.plunet.com](http://www.plunet.com)

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# 01 Introduction



## Plunet in Numbers

|         |   |  |                                       |
|---------|---|--|---------------------------------------|
| COMPANY | <b>2003</b><br><i>Founded</i>                       | <b>3</b><br><i>Sites</i>                           | <b>60+</b><br><i>Employees</i>        |
| PRODUCT | <b>20+</b><br><i>Integrations<br/>&amp; modules</i> | <b>13</b><br><i>UI languages</i>                   | <b>No. 1</b><br><i>TBMS worldwide</i> |
| USERS   | <b>500+</b><br><i>Customers</i>                     | <b>50+</b><br><i>Countries on<br/>6 continents</i> | <b>50k+</b><br><i>Users per day</i>   |



**Stefan Dümig**

Managing Director  
Plunet GmbH

“

We recognized the need for a centralized system that combines all the steps of the translation management process—from customer requests to vendor assignment to invoicing. Plunet BusinessManager provides a way for project managers, customers and vendors to collaborate on projects in a single software. Together with a team of committed and knowledgeable staff in Germany and the USA, we constantly develop innovative solutions for our international client base. That's why today Plunet BusinessManager is the world's leading business and translation management solution, highly automated and customizable to individual requirements.

## Plunet and the Challenges of the Translation Industry

The language and localization industry today is characterized by the use of modern technologies, which are continuously being developed. Translation management systems, CAT tools with integrated translation memories, and automated workflows have become indispensable for the daily work of language and translation service providers. To remain competitive in this rapidly changing industry, you need to be able to complete translation projects quickly, securely and efficiently. Integrations with other tools help to keep processes as lean and efficient as possible.

### What makes Plunet special?

Founded in 2003, the IT company Plunet offers a top-class business and translation management system: Plunet BusinessManager. From the very beginning, Plunet has focused on the changing needs of the industry, always one step ahead. Over 500 customers across the world—primarily language service providers and internal language departments—use Plunet to successfully manage their business processes.

### Plunet offers you:

A central platform for project managers, customers, and vendors.

Automated workflows.

Simple and secure options for data transfer.

A high level of flexibility for different target groups, organizational forms, and for dealing with changes.

Extensive reporting options for analysis and evaluation.

Seamless integrations with CAT tools and third-party software.

### With Plunet, you can:



Significantly reduce project lead times.



Save time and money.



Achieve long-term growth.

“

*When we started at the beginning of the 1990s, we carried out our management processes manually. Once the company started to grow and digitalization increased, there was a need and a market for a system that helps to effectively organize business processes across multiple locations.*



*Edward Vick*

CEO

EVS Translations GmbH

# 02 Settings

## The Admin Area

### Adjust the system to your requirements

Plunet BusinessManager contains an extensive Admin Area where you can customize the system to your requirements and specifications. You can make global settings for all tabs, menus and functions in the system and define what your users can see and do in Plunet.

Set up the e-mail client to send e-mails directly from the system.

Create user accounts for your colleagues, clients and vendors.

Manage access rights in the system to ensure that information is only seen by authorized users.

Define customizable elements such as additional text fields and logos to personalize the system.

Create document and e-mail templates in multiple languages.

Set up different user interface languages for international users.

Define the types of services that your clients can request in projects.

Define standard price units and price lists for clients and vendors.

Activate UI languages in the system [Dutch, English, French, German, Italian, Japanese, Korean, Polish, Portuguese (Brazil), Portuguese (Portugal), Russian, Simplified Chinese, Spanish] or upload your own language files.

## Document & E-mail Templates

### Customizable for individual needs

Document and e-mail templates are a central part of Plunet. Impress your customers and suppliers with professional communication, appealing corporate design and a personal touch. Customizable e-mails, documents and forms will help you manage projects more efficiently from A to Z.

#### Personal and professional project communication

Plunet provides templates for all documents and e-mails sent from the system: quotes, order confirmations, invoices, purchase orders, etc.

You can customize the pre-defined templates down to the last detail to fit your preferences and the requirements of your customers. With a wide variety of editable fields, the customization possibilities are endless.

#### Personalize your templates for your customers

Different customers have different needs. You can create different template sets and assign them as needed. You also have the opportunity to fine-tune the message and recipients of manual e-mails before sending them.

Do you need document templates for your translation projects in two, five or even more languages? With Plunet you can create templates in as many languages as required.

## Security & Data Protection

### Keep maximum control

Data protection has top priority at Plunet. We invest strongly in securing our infrastructure and fulfilling the current data protection standards. In this way, we can ensure the security of your data and make it possible for your work with Plunet to comply with data protection rules.

#### More security and convenience at login

Two-factor authentication (2FA) guarantees maximum security at login. Whether vendors or customers, all operating levels are doubly secured by the necessary password verification.

With the Single Sign-on (SSO) function, you do not need any additional login data. After a one-time authentication, you have access on all computers and to all services for which you have authorization. You no longer need to log in every time.

An additional security level can be activated if the user forgets their password. To reset the password, a Captcha needs to be entered as a security code.

#### Protecting your data from external attacks and loss

Plunet uses TLS (SSL) encryption for safe data transfer and communication using the HTTPS protocol.

In addition, the system and every new Plunet release is checked and continually protected from external attacks by regular internal OWASP (Open Web Application Security Project) tests and outsourced penetration tests.

Daily automated tests of the current development release ensure excellent stability and performance of the software and thus provide great protection against data loss.

### Plunet and the EU GDPR

The EU GDPR has resulted in some significantly stricter framework conditions for collecting and processing personal data. Plunet provides you with the following functions for working in accordance with the GDPR:

When you create new contacts in Plunet BusinessManager, they can be automatically notified that their data has been collected.

You can specify the place where the first contact was made, in order to verify the source of contact for the collected data.

Contacts can request the deletion of their data at any time. The time of deletion depends on the specified retention periods, after which the data will be deleted automatically.

In the Plunet Online Help you can find a detailed overview of the personal data that can be stored within Plunet.

### Advice on data protection and security

We'll help you when you don't know what to do. Our team is happy to assist you with any questions and queries about data protection and security.

“

*Plunet has a high standard of security which is complemented by SwissGlobal's ISO 27001-certified IT environment. This ensures that customer data are always fully protected.*



Mark Cheetham

COO

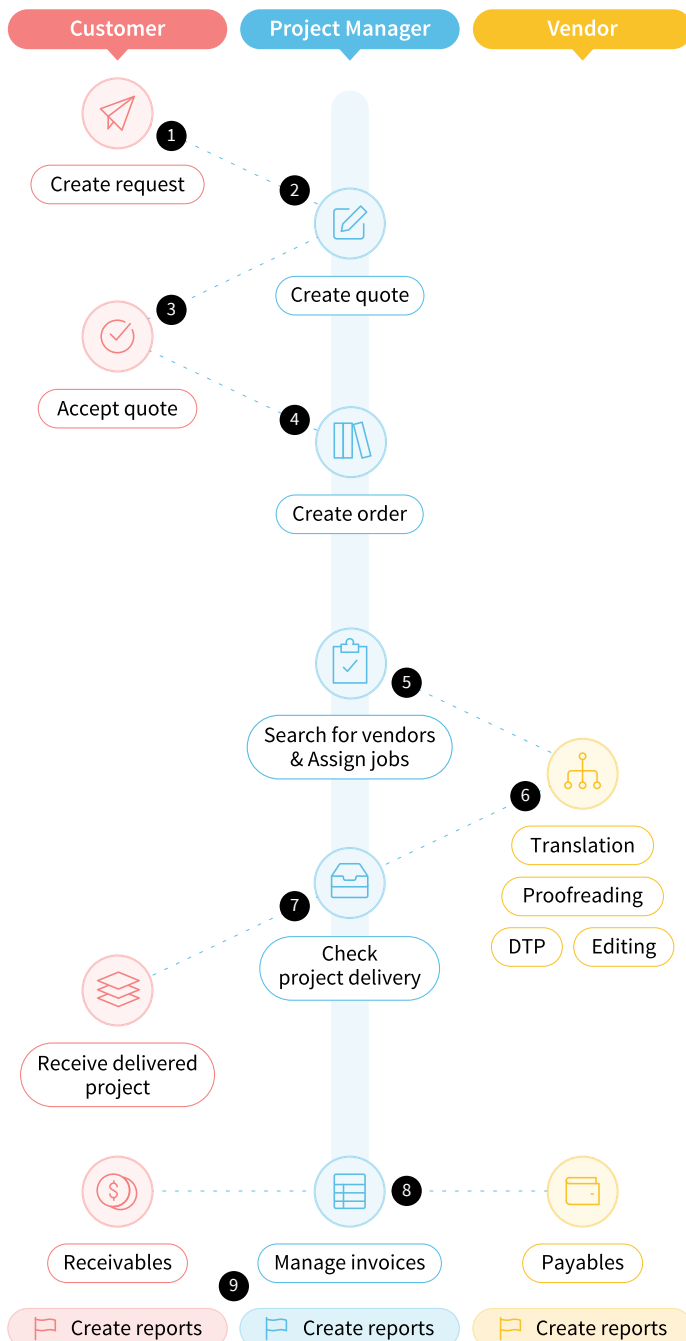
SwissGlobal Language Services AG

# 03 The Plunet Workflow

## Project Management

### Organize your projects step by step

With Plunet, you have total control over your translation projects, from A to Z. From requests to orders to invoicing, your project management portal always gives you an overview of all files, prices, and the progress of your projects. As a result, you can always intervene where necessary and adjust processes as required. With automated workflows and a wide variety of customizable templates, you can save a lot of time and process your project quickly and efficiently.



#### 1 Customer request

Customers can request a quote or place an order in Plunet BusinessManager using the Customer Portal. All project and reference files can be uploaded in the Customer Portal quickly and securely. Requests can also be sent via e-mail, API or CMS.

#### 2 Quote creation

You can quickly create quotes using templates that are already filled with information such as customer details and language combinations. If you work with a CAT tool integration, you can select the CAT interface at the quote stage and automatically calculate the prices for the project.

#### 3 Quote acceptance by customer

Customers can accept a quote in the Customer Portal or request an alternative quote if it does not match their requirements.

#### 4 Order creation and management

Orders in Plunet can be created from a quote, from a request if a quote is not required, or from scratch. Information from the request or quote is directly transferred to the corresponding order.

#### 5 Vendor search and job assignment

Search for suitable resources based on your own customizable criteria and assign them directly or send a job request.

↓ See more detailed information on [page 9](#)

#### 6 Job workflow and automation features

Use pre-defined workflows for your projects (e.g. Translation-Editing-Proofreading). These workflows are displayed clearly in the system and can be customized to fit your requirements. All steps/jobs in the workflow can be created individually and there is no limitation to the number of workflow steps and workflows that project managers can create and select. Every workflow step has individual settings, such as access rights, work instructions, selection filters and automation settings.

Manual and repetitive tasks can be reduced to a minimum thanks to Plunet's automation features. Project files delivered by one resource can be automatically passed on to the next resource in the workflow so that they can seamlessly continue with



their assigned job. The next job in the workflow is automatically triggered when the designated status is reached, and the next resource can begin their work.

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### Project delivery

Once all of the resources have delivered their jobs and the jobs have been approved by the project manager, the finalized project can be delivered to the customer. Plunet offers multiple delivery methods: You can deliver the whole project to the customer at once, or each language combination individually. The files can be delivered as an e-mail attachment, via a download link in an e-mail or the customer can download the files directly from the Customer Portal.

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### Invoice management

Create invoices in Plunet for completed projects and send them to your customers. You can also compare the invoices sent by your vendors with the approved jobs in Plunet, or vendors can create their own invoices in the Vendor Portal.

↓ See more detailed information on [page 10](#)

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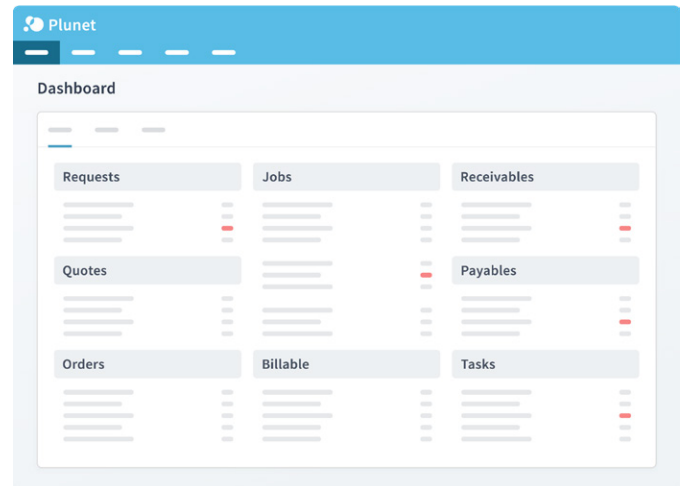
### Reporting

Create status reports to track the progress of your projects, or run reports on gross profit, project feedback, new customers, and more. Customers and vendors can also run their own reports in the Customer or Vendor Portal.

↓ See more detailed information on [page 9](#)

## The Dashboard

### All project information at a glance



Plunet's Dashboard is the core of the system, letting you focus on what is really important to you. The Dashboard gives you an overview of all important project information—from requests, quotes, and orders, to tasks, deadlines, and invoices—so that you always know what you need to do next.

### Always up-to-date

The Dashboard keeps you up-to-date on the progress of your projects and any changes that have been made. Your team members' updates are processed in real time, while updates made using automatic workflows are displayed immediately. Overdue orders, jobs, and invoices are highlighted in color, giving you a quick overview of urgent tasks. You can also filter the Dashboard to hide certain sections and only display the most relevant information.

### Individual and team Dashboards

Thanks to Plunet's flexible rights management, you can give your users access to individual Dashboards and create Dashboards for whole teams or branches so that you can view their projects separately.



## Vendor Management

### Find suitable vendors for your jobs

With the integrated vendor search in Plunet, you will quickly find the most suitable resource for each job requested by your customers. Plunet provides you with a wide variety of options for finding and assigning vendors.

#### Automated options for vendor assignment

Plunet offers many options for vendor assignment, which ensure that you can find and assign the most suitable resource for the job. You can assign your chosen vendor manually or send a job request to multiple vendors. Version 8 introduces powerful automatic assignment methods, including the possibility to create cascading job requests with the VendorSearchManager PRO module.

Do you already know the best vendor for the job? Then simply open the job and assign them directly.

If the choice is not clear, then you can use a wide variety of customizable filter criteria in the job to find the right vendor. For example, you can filter by area of expertise, service type, price category or language. It is also possible to rank and compare resources according to price, profit margin and other criteria. You can send a personalized job request to multiple resources at once. Depending on the settings in the job, the top ranked or first vendor to accept will be automatically assigned to the job.

For more information on automated vendor assignment, please see our VendorSearchManager PRO module ([↓ page 19](#)).

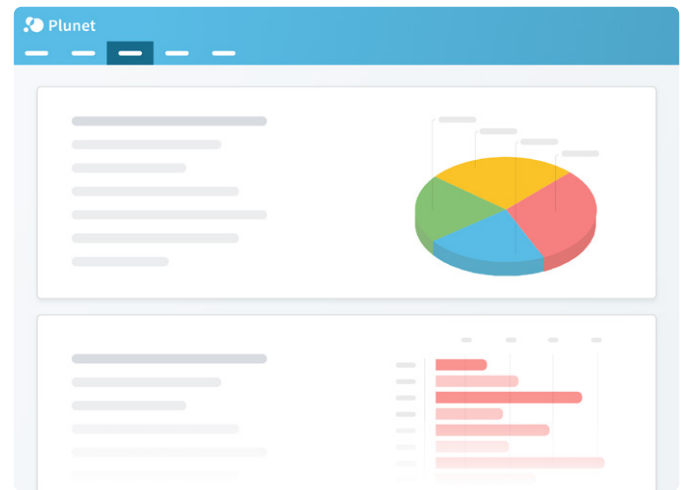
The screenshot displays the 'VendorSearchManager PRO' interface. It features a top navigation bar with tabs: SPECIFICATION, PRICES & TIME, ASSIGNMENT, FEEDBACK & COMPLAINT, and DELIVERY. The 'ASSIGNMENT' tab is active. Below the navigation bar, there are sections for 'Selection criteria' (Language (source), Language (target)), 'Rank results by' (Prices, TBA jobs for customer, Availability), and 'Assignment method' (Automatic - Top ranked, Automatic - FCFS, Manual - Request availability, Manual - Direct assignment). The 'Send job request' section shows '5 matching resources' selected. The main area displays a table of 12 matching resources found, with columns for Name, Resource assessment, and Price.

|    | Name | Resource assessment | Price   |
|----|------|---------------------|---------|
| 1  |      | 100 %               | 126 EUR |
| 2  |      | 97 %                | 128 EUR |
| 3  |      | 95 %                | 140 EUR |
| 4  |      | 94 %                | 138 EUR |
| 5  |      | 94 %                | 142 EUR |
| 6  |      | 93 %                | 110 EUR |
| 7  |      | 93 %                | 118 EUR |
| 8  |      | 93 %                | 136 EUR |
| 9  |      | 92 %                | 122 EUR |
| 10 |      | 92 %                | 125 EUR |
| 11 |      | 92 %                | 128 EUR |
| 12 |      | 91 %                | 109 EUR |










## Reports & Queries

### For informed decision-making

Data help you to make informed decisions: The more specific, the more useful. With Plunet you can use a broad range of customized queries and status reports for successful project controlling. And we can guarantee that the results will change your way of working in the long run.



**Below is a selection of the questions that Plunet can answer for you:**

-  How many projects were completed in the last month?
-  Which language combinations are the most important?
-  Which of my customers were particularly active last month?
-  Which vendors have received positive feedback?
-  How much money did I spend this week on freelancers and internal staff?
-  How many quotes are currently pending?
-  How high is my gross profit per project / per language combination / per customer?
-  Which customer yielded the most revenue for me in the last month?
-  How much revenue do I make per target market?

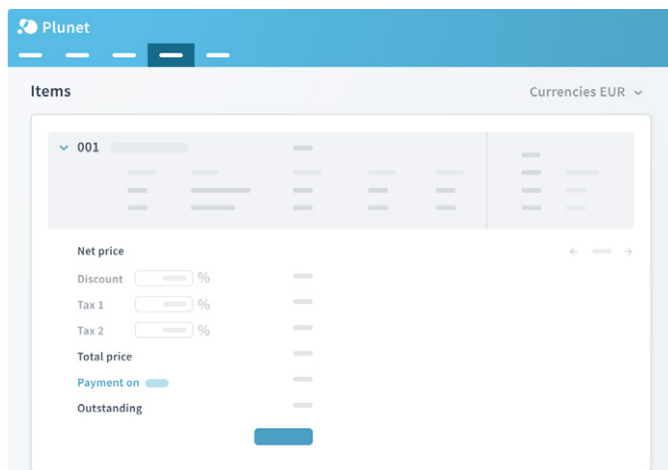
## Invoice Management

### Handle your payables and receivables in the system

Processing and organizing invoices costs time and energy. With Plunet's functions for a better overview, efficiency and control, you not only save a lot of time, but you might even enjoy invoice management.

#### All invoices at a glance

Plunet gives you an overview of the status of your customer and vendor invoices. You can also run reports on specific invoices. Outstanding and paid invoices can be found easily. In addition, you can set up pop-up reminders for invoices that have not yet been paid.



#### Save time with collective invoices

Do you want to invoice all of the projects that a resource has completed in the last month in one go? Or group all of a customer's orders in a single invoice? Both are possible with the collective invoice function.

#### Integration of external accounting tools

Plunet's file-based interfaces to a variety of accounting tools make it possible to export the invoices that you have created in Plunet and process them in your accounting system.

#### Assistance during invoicing

When you create a project in Plunet, suitable price lists and tax rates are suggested and copied to the invoice. Incomplete invoices cannot be sent. Pop-up messages remind you to check invoices for customer specifications, reducing the risk of error.

#### Country-specific requirements

When invoices are created in Plunet, country-specific requirements can be taken into account, such as SAF-T in Portugal, QR invoices in Switzerland and E-Invoicing in Italy.

#### Vendors can manage their own invoices

Your vendors can give invoices their own invoice numbers and manage all of their invoices in the Vendor Portal.

#### Automate reminders

Reminders for payment can be sent to customers automatically. You can also specify payment deadlines and fees for each reminder.

# 04 Customers & Vendors

## Customer and Vendor Prices

### Manage prices with flexible price lists

How do I know which price to set for a translation, for a certain language or for a certain customer? Where do I see the prices that I have agreed with my customers? How do I know which vendor is the most cost-effective? Many questions, one solution: With Plunet's price lists, you can keep track of all prices in the system.

### All prices at a glance

Price lists give you a quick overview of the prices that you have agreed with your customers and vendors. They contain the language combinations and corresponding prices per service. You can create standard price lists for all customers and vendors and then make adjustments for each specific customer or vendor. You can also assign multiple price lists to a single customer or vendor and differentiate between them based on properties such as industry or scope of service. In this way, you can ensure that the correct price list is always used in a project.

| Quantity             | Price unit                     | Prices               | Weighting              |
|----------------------|--------------------------------|----------------------|------------------------|
| <input type="text"/> | Words Translation No Match     | <input type="text"/> | <input type="text"/> % |
| <input type="text"/> | Words Translation 50-84% Match | <input type="text"/> | <input type="text"/> % |
| <input type="text"/> | Words Translation 85-99% Match | <input type="text"/> | <input type="text"/> % |
| <input type="text"/> | Words Translation 100% Match   | <input type="text"/> | <input type="text"/> % |

### Prices per service and language

In Plunet you can define the services that will be provided in projects, such as translation or DTP. The prices for these services can be calculated using a wide variety of pre-defined and/or customized price units. In this way, you can create general or individual price lists and use them to calculate prices in your projects. Price lists can be adjusted to your requirements and can contain as many price units as you need.

“

*Since we have multiple longstanding client agreements, the ability to create and save multiple price lists for various customers is key. Everything vital to our business—customer and vendor information, quotes, invoices, deadlines, payment status, and more—is in the system. I would be lost without Plunet.*



Yuri Ivanov

CEO

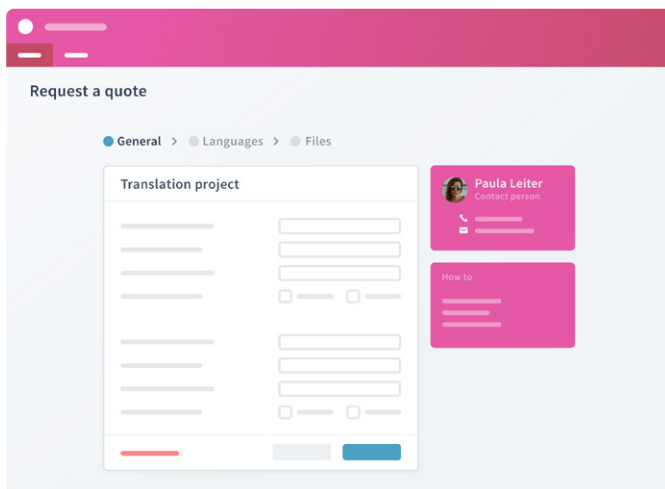
IVANNOVATION Language Management

### Automatic price calculation

No more manual calculation. No more searching for prices. When you create a project in Plunet, a suitable price list is suggested automatically, making manual price calculation a thing of the past. The total price of the project is calculated automatically. In this way, you can save a considerable amount of time when creating quotes.

## The Customer Portal

### Simplify collaboration with your customers



With Plunet's Customer Portal, you can directly integrate your customers in the project workflow. Thanks to the straightforward request process, transparent overviews of project statuses, and editing options, your customers will know everything that is relevant for their cooperation with you. No matter if you are processing translation projects or interpreting projects—with the Customer Portal, you will reduce manual work and gain valuable time.

#### Easy to use

Your customers can view all of their requests, quotes, orders, and invoices at a glance. With just one click, they can request projects, accept or reject quotes, upload project files via drag and drop, and download finalized projects securely from the Customer Portal. It is also possible to include your customers in the production workflow by letting them review a project before it is delivered.

#### Flexible and customizable

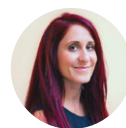
The Customer Portal can be customized to fit your customers' individual needs as well as any modified conditions. In the Admin Area, you can set up individual text fields, templates, and rights for customers and customer groups. Your customers can also create and view status reports on different aspects of their projects. The layout of the portal itself can be adapted to your customers' requirements, for example with a customized logo and header.

#### Complete transparency for you

Updates and changes made by your customers are automatically documented, which means that you can track projects in real time. As a project manager, you will always be up-to-date on all of your projects and can immediately intervene whenever necessary.

“

*Our Project Management team started using Plunet BusinessManager back in 2008. It has proven to be a reliable and constantly evolving translation management system that helps us with our everyday planning, monitoring and the automation of our processes. Plunet adapts to our needs and gives us and our clients a clear overview of all our quotes, orders and invoices.*

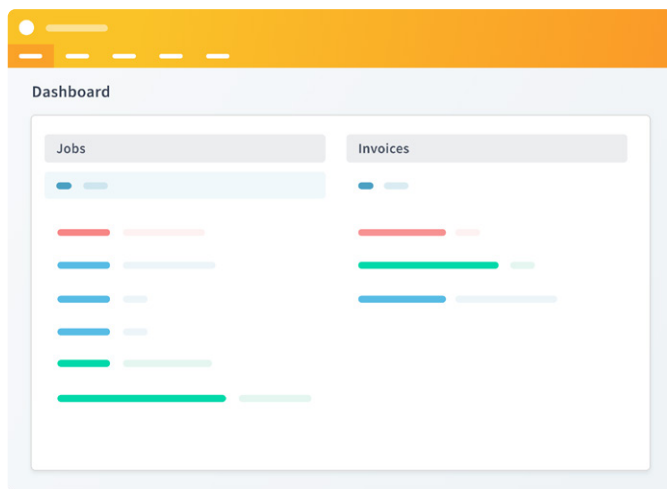


*Effie Salourou*

Customer Operations & QA Manager  
CGT Commit Global Translations Ltd.

## The Vendor Portal

### *Simplify collaboration with your vendors*



With Plunet's integrated Vendor Portal, you can include your external vendors in your working processes and simplify how you work with them. They can access all important project files and information in one place, maintain an overview of their jobs, and save valuable time.

#### Individual customizations are possible

You can customize the Vendor Portal according to your requirements, both visually and in terms of content. Plunet also includes a sophisticated rights management, which makes it possible to adapt the portal for each vendor. Your vendors can modify their own profile data and specialist skills, enter their availability and absences, view their prices and resource assessment, create and manage invoices, and communicate with you via the integrated e-mail client.

#### Detailed job overview for vendors

All of your vendors—agencies, freelancers, internal translators, interpreters—have their own Dashboard. The Dashboard will inform them about the current status and deadlines of the jobs that they are currently working on for you. When you send a job request, the vendor can accept or reject the job via an e-mail link or in the portal. Plunet sends automatic notifications to your vendors to inform them of project status updates. Vendors can also create detailed status reports about their jobs, invoices, and time sheet.

#### Invoice management in Plunet

After a job has been approved, your vendor can create the invoice digitally in the portal. The invoice will then appear in your system for further processing and payment. The payment information is saved in the vendor's profile and can be updated there.

A screenshot of a web form titled 'Requested Job'. It includes a 'Status' section with two radio buttons: 'Accept' (selected) and 'Reject'. Below this is a text input field labeled 'Message to project manager'. At the bottom right, there is a blue button, likely for submitting the request.

# 05 Integrations & Modules

## Expand Your System to Fit Your Needs

As a language service provider, you spend your time working with different software providers, such as CAT tools, content management systems, and financial accounting software, which require you to switch back and forth between systems. As a Plunet customer, you can benefit from our CAT tool integrations, modules, and the Plunet API, in order to manage your business and production processes centrally on a single platform. In this way, you reduce your manual work and gain valuable time.

### Integrations

#### CAT Tool Integrations

##### Connect CAT functions with Plunet

With Plunet, you can seamlessly connect all of the leading CAT tools, which are indispensable for professional translation processes. The integrations save you both valuable time and unnecessary costs. The different integration levels can be split into static and dynamic CAT integrations.

##### Static CAT integrations

With Plunet's file-based integrations, you can import CAT analysis files into Plunet and apply them to your projects. In this way, both project and job costs can be calculated quickly and automatically.

*Partners: Alchemy (Catalyst), Atril (Déjà Vu), JiveFusion (Fusion), memoQ (memoQ), Phrase (Phrase TMS), Microsoft (Helium), Practiline Software (PractiCount and Invoice), RWS (MultiTrans, Passolo, TradosStudioManager, WorldServerManager), Star (Transit), Lionbridge (Translation Workspace), Wordfast (Wordfast), XTM (XTM Cloud)*

##### Dynamic CAT integrations

The dynamic CAT interfaces provide a complete integration and automation of the most important functions from our partner CAT tools. From project creation with customized templates to automatic price calculation and job assignment,

you can process all of the necessary steps of your translation management process, without leaving Plunet. In this way, you maintain complete control over the entire management process of your projects.

*Partners: memoQ (memoQ), Phrase (Phrase TMS), RWS (GroupShareManager, TradosStudioManager), XTM (XTM Cloud)*



### Plunet API

#### Seamless integration of third-party software

The Plunet API provides you with the possibility to fully streamline your processes and integrate Plunet BusinessManager with accounting and CRM software. With the different Plunet API services, you can manage all contacts, projects and invoices within Plunet and exchange project data with your customers.

Thanks to the high level of automation, you will save a great amount of time in your daily project work by using the Plunet API.



*We are constantly impressed by the flexibility and adaptability of this translation management system. Its numerous interfaces facilitate seamless integration with other software applications, and substantially increase the efficiency of our translation workflows.*



*Katharina Krause & Kristina Lange*  
CEOs  
TL Translationes GmbH

## Modules

**Quality Management****Achieve high-quality results**

The quality management functionalities in Plunet help to increase production standards, improve customer satisfaction and facilitate internal reporting.

**All in one place**

Project managers, quality managers, vendors and customers can be involved in the quality management process in Plunet. Feedback on jobs and orders, performance reviews for vendors, job or order complaints can all be entered in Plunet BusinessManager. All the data can be used to improve the quality of future projects and for internal reporting purposes.

**Track vendor performance**

In Plunet BusinessManager, you can assess your vendors internally and calculate their overall rating based on your own selected criteria, for instance punctuality, language skills, technical know-how and more. With Plunet's additional QualityManager module, you can also track the performance of your vendors directly in the system. You can assign the very best vendor for your project based on the vendor assessment.

| Criteria    | Rating (Stars) |
|-------------|----------------|
| Language    | 5              |
| Specialist  | 4              |
| Technical   | 4              |
| Deadlines   | 5              |
| Flexibility | 5              |

**Track customer satisfaction**

Enhance your quality management processes by collecting customer order feedback in the system, based on fully customizable criteria. Customers can rate projects directly in the Plunet Customer Portal, and you can track this feedback in Plunet. Alternatively, feedback can be entered internally by project managers or other members of the team.

“

*We chose Plunet because we need a system which is capable of a high level of integration and offers carefully standardized workflows within the scope of our certified quality management processes. This is exactly where we see one of the major strengths of Plunet BusinessManager.*



Christian Enssner

Managing Director & Founder  
t'works

**Transparent complaint management**

With QualityManager, project managers and customers can create order complaints directly in Plunet. You can define different complaint types and their consequences, as well as restrict who can see or edit complaints in the system. It is also possible to track the costs incurred due to complaints and how you dealt with the issue (revision of the translation, discount for customer, etc.). In addition, job-specific complaints can be created, linked to order complaints and tracked for internal use. The collected information can be captured in reports and helps increase customer satisfaction and vendor management in future projects.

**Certified translation management workflows**

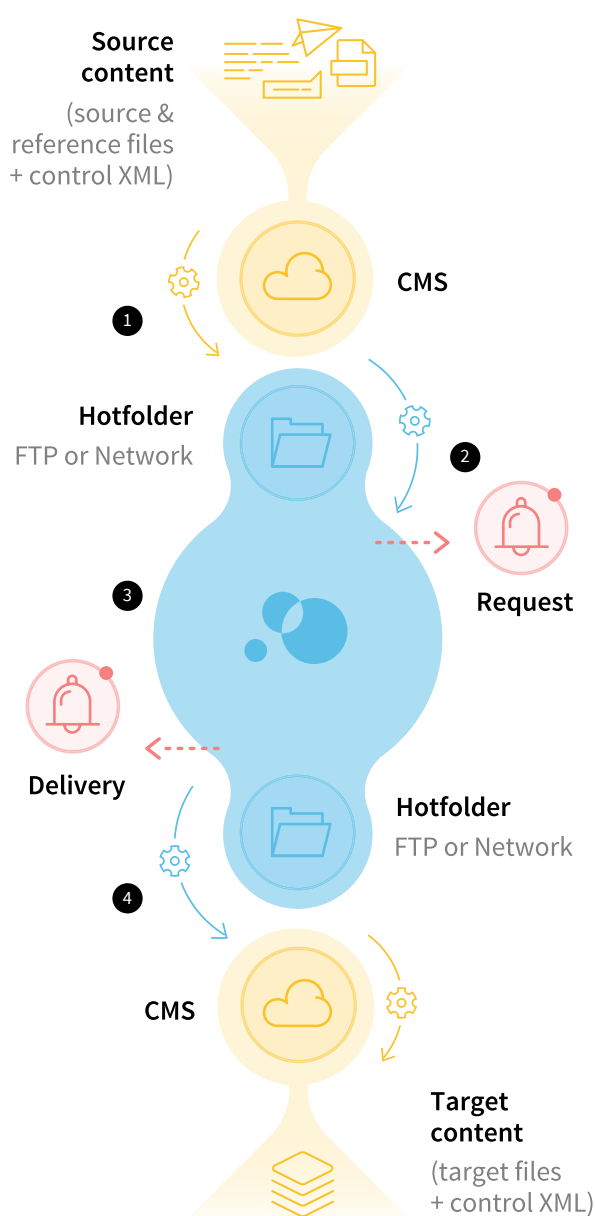
Guaranteeing ISO 17100:2015 compliance is significantly easier with Plunet BusinessManager. You can monitor the compliance of your workflows with the ISO 17100 norm by using the ISO functionality in Plunet. If you specify that a project should be ISO 17100 compliant, then only vendors who also fulfill ISO 17100 criteria will be suggested for the project. Furthermore, you will be alerted if a project is not structured to be ISO compliant, for example, if the four eyes principle cannot be guaranteed because a review job is missing.



## EventManager

### Connect CMS/DMS with Plunet

The Plunet EventManager module makes it possible to seamlessly integrate your customers' content management or document management systems in Plunet. In this way, you can automatically pull the content to be translated from the respective system and deliver them back to the system after processing. This not only saves administration costs, but also valuable time.



### Requirements for using the Plunet EventManager module

- The CMS/DMS supports multilingual contents.
- The CMS/DMS has import and export functions.
- The CMS/DMS supports API calls for accessing source files.
- The project metadata can be created in the CMS/DMS or attached.
- The files can be zipped into a package.
- The FTP server provides an access option for the vendor.
- The COTI standard is supported and the data exchange between the editorial and translation memory systems is guaranteed.

### The workflow with Plunet EventManager

- 1 You will automatically receive requests and orders as data packages from your customer's CMS/DMS. The required content (source and reference files) can be called from folders in the local network or FTP or WEBDAV servers.
- 2 After a defined period of time, the EventManager module checks whether or not new data packages have arrived and sends you automatic notification e-mails to announce new projects.
- 3 The project files can be automatically analyzed by a CAT tool if you are using a dynamic CAT integration with Plunet.
- 4 When the target files have been automatically delivered, EventManager creates return packages and stores them in a folder in the local network, on an FTP or WEBDAV server. The CMS/DMS of your customer can automatically call this folder and thus has direct access to the required contents. You will be informed of new deliveries via e-mail.

## AutomationManager

### Automatic project processing with Plunet

How many hours do your project managers spend manually creating quotes and orders, not to mention sending the corresponding e-mails and documents? With Plunet's AutomationManager module, your project managers have more time to focus on other important tasks. Projects are created in the system automatically, without any intervention from the project manager. Prices and job dates are calculated automatically and checked to ensure they are realistic. The entire process is quicker for customers and saves your project managers valuable time.

#### Reduced workload for project managers

Project managers can put their feet up with the Plunet AutomationManager module. As soon as your customer submits a request, the quote or order is created automatically in Plunet. The system calculates the prices of the items via Plunet's dynamic integration to the CAT tools of memoQ, RWS and Phrase. The first assignment round of one or multiple jobs will start automatically. This can save a considerable amount of time, decrease project management costs and maximize customer satisfaction by providing immediate feedback.

“

*Every day we receive requests in standardized formats via the Plunet Customer Portal. Thanks to Plunet's AutomationManager, the workload for our project managers can be reduced by up to 90 percent. Our PMs only have to intervene at critical points in the workflow that require human control and decisions. A huge time-saver!*



Peter Seltsam  
CEO  
Eurotext AG

#### Fail-safe automation

If everything is automated, what happens when errors occur? AutomationManager will take care of it: The built-in plausibility check ensures that the prices and dates in the project are checked before the project starts. The delivery dates requested by the customer are checked to make sure that they can be complied with. The calculated prices and planned time for the project are also analyzed. If there are any problems, the project manager will be notified immediately by the system and can step in.

#### AutomationManager: How does it work?

Your customer creates a request in the Plunet Customer Portal.



Depending on the request, either a quote or an order is automatically created based on the request.



Prices for the project are calculated using the CAT tool analysis.



The dates of the project are checked for validity.



The quote or order confirmation is sent to the customer.



In the case of a quote, the corresponding order is automatically created in Plunet as soon as the customer accepts the quote.



The dates for each job are automatically calculated.



The first assignment round of one or several jobs starts automatically.

## ConfidentialityManager

### Four levels of confidentiality for more data security and control

Plunet not only gives you an overview of all your projects, but also complete control over all files that are exchanged within the system. With the add-on module ConfidentialityManager, you can assign one of four confidentiality levels to your projects to define how project files can be exchanged:

- Files can be uploaded and downloaded in Plunet without restrictions.
- Files can only be downloaded in encrypted form and a password is required to access the documents.
- Vendors can only work on the documents on an internal server.
- No project files can be uploaded or downloaded in Plunet. The vendor completes the job for the customer on site.

Confidentiality levels can also be assigned to individual vendor and customer profiles to ensure that only people with the appropriate confidentiality rights work on a project.

## InterpretingManager

### Easy handling of interpreting projects with Plunet

Does your company provide interpreting services as well as translation or plan to do this in the future? Plunet gives you the perfect solution for both. With our additional InterpretingManager module, you can add a powerful interpretation management platform to your Plunet system in a simple and cost-effective way.

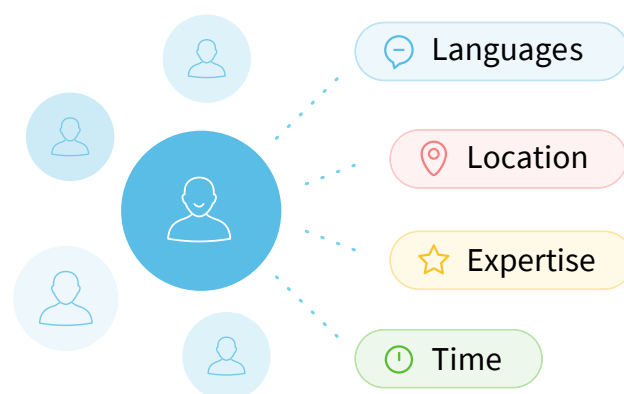
#### One system for all projects

One great benefit of the integrated Plunet solution is that you have a management system with a joint database for all interpreting and translation projects, as well as the management of your customers and service providers. With just a single click, your customers can decide whether they want to request a translation or an interpreting project in the Customer Portal.

#### Easy resource management

Plunet helps you to find and assign suitable interpreters in a quick and easy way. You can customize your search by combining any number of search criteria. This includes:

- ✓ Languages
- ✓ Distance to event location via OpenStreetMap integration
- ✓ Price of the interpreter
- ✓ Customer feedback
- ✓ Customizable properties



#### Efficient job management and flexibility

Job templates can be used to send job requests to interpreters. Interpreters can directly accept the jobs via e-mail without needing to log into their own systems, which ensures quick turnaround times. The first interpreter to accept is assigned to the job automatically. Plunet's resource pooling also makes it possible to send requests to multiple resources at once.

The working dates for interpreting jobs are automatically attached to the job request and job assignment e-mails. The file can then be imported into your Outlook calendar, where you can set reminders for jobs or projects and synchronize them with Plunet.

At the click of a button, jobs can be canceled, new jobs can be created and automatically sent to the interpreters. In the same way, Plunet automatically reminds resources about their upcoming jobs with a reminder e-mail. The system tracks everything and even makes it possible to create reports on canceled jobs.

## VendorRegistrationManager

### Time-saving application process for new vendors

With the add-on module VendorRegistrationManager, your vendors can register themselves in Plunet BusinessManager. This speeds up the entire application process and will save you a lot of manual work.

#### Customize each step in the Plunet Admin Area

Set up the registration process for your vendors step by step in the Admin Area. In addition to contact, price, and payment information, you can specify mandatory fields for language skills and user-defined properties such as specialist subject areas and additional qualifications. It is also possible to incorporate your terms and conditions into the registration process, which makes the whole process even more efficient.

VendorRegistrationManager provides you with templates for e-mails, which are automatically sent once your vendors have completed the registration.

#### The registration form for Plunet

After the registration steps have been defined in the Admin Area, your vendors can use the registration form to register themselves in Plunet. The form can be adapted to your individual requirements and embedded in your website. After filling in and submitting the form, the vendor will receive an e-mail with login details and a link to register in Plunet BusinessManager.

You will be automatically notified about every new registration and can check the application details of the new vendors before they are added to the official vendor database.

“

*The VendorRegistrationManager is a great module because it saves time for vendor managers, who can easily vet the vendor profiles that get created in the system after online registration. On top of that, terms and conditions can be updated directly in the system and have to be accepted by vendors—new and existing—before they can work on projects.*



Sophie Halbeisen

Director of Business Development  
Plunet Inc.

## VendorSearchManager PRO

### Automated Vendor Request and Assignment

Using the VendorSearchManager PRO module, you can automate the assignment process and set up multiple assignment rounds to send job requests to a predefined number of resources. If your preferred resource rejects or ignores the request, the next round can start automatically and send a request to a different resource. That way, the project manager does not need to intervene and send the next job request, and your resources will not receive so many e-mails. These rounds can be saved as part of a workflow template to minimize repetitive actions and increase efficiency.

#### Cascading job requests

You can cascade your job requests and send a request to resources one by one. When you create different rounds in a workflow template or job, you can set them up to always ask the best resource based on your chosen criteria.

Then, Plunet will only send a request to that resource in the first round. If the person rejects the request or does not respond within the specified reaction time, Plunet will automatically start the second round, if activated.

The cascading selection method ensures that job requests are only sent to the best resources based on job criteria. The system will send as few e-mails as possible, rather than sending e-mails to a large number of resources at once.

# 06 Implementation & Support

## *The Plunet Implementation*

### *Learn how to use the system*

The Plunet implementation can be personalized according to your needs. The standard implementation takes place online with your implementation specialist. If required, part of the User Training can also be done on-site. Your implementation specialist will address all needs and questions during a kick-off meeting and will offer various training options to ensure the implementation is efficient and fits in with your everyday work.

**The implementation process differentiates between two types of Plunet users:**



#### **Admin users**

The administrators of the system who are responsible for making any required changes after training is completed, such as setting up e-mails, dealing with server matters, etc.



#### **Internal users**

Project managers, vendor managers, accountants, etc., who will use Plunet to handle all or part of their daily work.

**What does the project evaluation and implementation phase look like?**

#### **1. Kick-off Meeting**

Initial meeting with your implementation specialist to designate project teams, coordinate data import, training schedules, and installation.

#### **2. Installation**

The installation can be done on your server, on Plunet's server or on a third-party server and will usually be completed online by our support team. Some of our clients prefer to perform the installations/upgrades themselves due to security regulations, but this can also be done by Plunet engineers.

#### **3. Data Migration Services**

The implementation specialist explains the data import sheets that help to import customer and vendor data before the start of the training phase. You convert the data of your existing database (customers, internal resources, vendors) into the format of the import templates and return them to Plunet. Plunet converts the database templates and imports them.

#### **4. Admin Training**

Participants in the Admin Training should have extensive knowledge of your company's internal production workflows. A system administrator needs to be appointed. During the Admin Training, your system will be set up based on your needs and requirements. Admin settings include:

- ✓ Definition of countries and languages
- ✓ Creation of properties and text modules
- ✓ Definition of jobs, services and workflows
- ✓ Setup of document and e-mail templates
- ✓ Creation of users and rights groups
- ✓ Creation of price units and standard price lists for customers and resources
- ✓ Setup of security and e-mail settings

## 5. System Check

System check after pre-configuration (individual system checks as needed).

## 6. User Training

Training for all internal resources that will use Plunet on a daily basis. During the User Training, different user groups learn how to work with the system after it has been configured based on your requirements. For example:

Working with the Dashboard

Receiving requests, creating quotes, orders, jobs, workflows, and invoices

Managing customers and vendors in Plunet

Working with the Customer Portal and Vendor Portal

Creating and running reports

## 7. Integration Training

Integration setup (e.g. for dynamic CAT tool integrations) and training for users.

## 8. Q&A Sessions

Question and answer sessions before and after go-live.

“

*The way the Plunet team coordinated the necessary training and implementation was amazing. Our implementation trainer inspired us with tutorials that were tailor-made to our requirements.*



**Hadi Ghazala**

Managing Director

AGATO Legal Translation

## The Plunet Support

### Service benefits for you

Quick responses, empathy, and solution-oriented help—these are the characteristics of the Plunet support team. Our experienced staff is available for you worldwide. Within the scope of your service and maintenance contract, you can benefit from continuous support and many other service benefits.

### Plunet ticket system

As a Plunet customer, you have access to the ticket system and can use this platform to publish your questions, ideas and suggestions. You can check the current status of your enquiry at any time and view the processing history. Enquiries that are marked as "urgent" will be dealt with as a priority.

### Plunet Support services at a glance

Installing Plunet BusinessManager

Upgrading the system with every Plunet release

Worldwide first, second and third level support

Support via e-mail and ticket system

### Additional service benefits in your customer contract

Automatic updates

Detailed release notes for every new version

Webinars

Knowledge Center

Community

# 07

## FAQ

### Can Plunet be deployed for a small LSP?

Yes, Plunet starts with the AgencyStart Edition, which includes two full user licenses and even small teams with a high workload can benefit from a software like ours. In addition, Plunet is very flexible and scalable, which is perfect for small agencies with a growth plan.

### Can we host Plunet on our servers?

Yes, Plunet can be hosted in-house and on a third-party server (e.g., Azure or AWS) as long as our server specifications are met. If you don't have your own infrastructure, we can also offer a SaaS solution and host Plunet for you.

### Do we need a user license for our external vendors?

No, vendors who only work on their own projects do not need a full user license and can use the system free of charge.

### Do we need a user license for our clients/requestors?

No, customers who only request projects and retrieve target files do not need a full user license and can use the system free of charge.

### Can you also work with internal linguists in Plunet?

Yes, Plunet lets you manage external vendors, such as freelancers and other agencies, but you can also work with internal linguists.

### Is there a maximum number of customer/vendor users that can be connected?

No, there is no limit to the number of clients or vendors that can log in to Plunet.

### How long does the implementation take?

A standard implementation will take approximately three months from initial kick-off meeting to go-live. The implementation process consists of two parts, one designated for Admin users for system setup and configuration, and user training for everyone who is working with the software after go-live.

### What file types can be uploaded to Plunet?

There is no file type or file size limitation as files are only stored/shared in Plunet, but are processed in the CAT tools.

### Can you deliver multi-lingual projects in a batch?

Yes, you can deliver multi-lingual projects in batches.

### Can our customers upload reference material for a project?

Yes, customers can upload reference material in the customer portal, which can be shared with translators automatically, if required.

### Do you have webinars that I can attend?

Yes, we have free webinars on Plunet's standard features and specific use-cases. You can find our upcoming webinars on our [homepage](#) and sign up to our newsletter to receive webinar invites and the latest Plunet news [here](#).



# 08 References

## Customer Stories

*Our customers tell their Plunet stories*



How Akorbi Boosted its Growth Potential

[Learn more →](#)



How ALT Translations Achieved over 85 Percent of Cost Reduction

[Learn more →](#)



Ready for Change? Follow the Example of CQ fluency's Fruitful Change Management

[Learn more →](#)



How Centralization Became the Key to Success for EVS Translations

[Learn more →](#)



How MCIS Turned Cost Savings into Social Investments

[Learn more →](#)



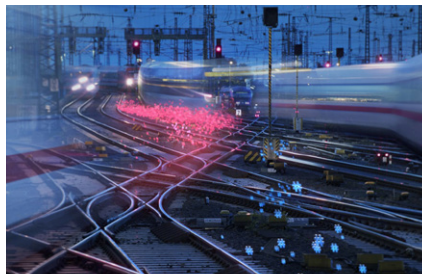
How Netwire Improved Their Business Processes

[Learn more →](#)



How Sprachenfabrik Reinvented itself—Transformation as Strategy

[Learn more →](#)



How Deutsche Bahn Made Its Translation Management Fit for the Future

[Learn more →](#)



Success with Plunet in Asia—How SuccessGlo Continued to Grow despite the Corona Crisis

[Learn more →](#)

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