CUSTOMER PORTAL
USER GUIDE

KONTEKST Translations

April 2018

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What is the purpose of Customer Portal?

Via Customer Portal, our customers can request a quote for translation services, track their quotes, projects and invoices, as well as browse past projects and download deliverables.

How do I access Customer Portal?

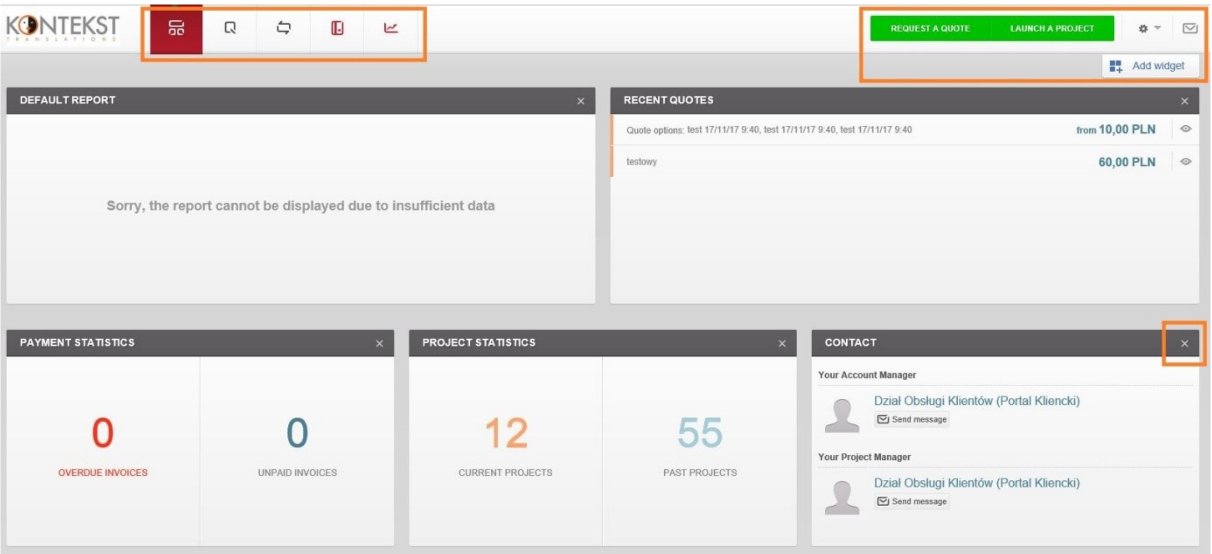
Please register your interest with our Customer Service Department (**konteksT@kontekst.pl**). You will receive a welcome email with your login and password. Click on the link in the email to go to the Customer Portal login page.

First login and Dashboard customization

[*-> watch video tutorial*]()

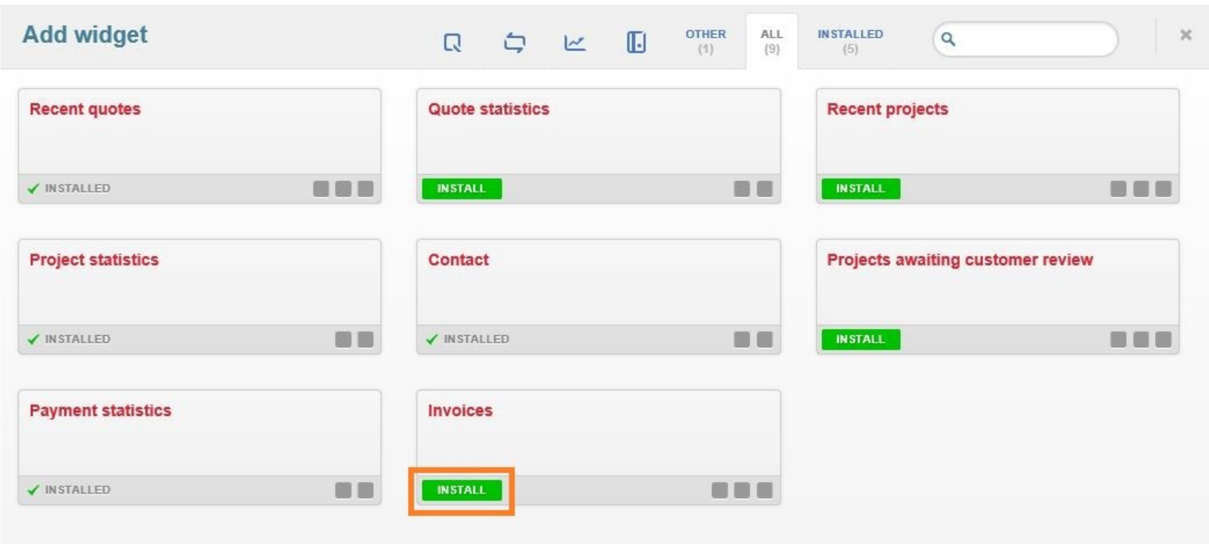
After you log in to Customer Portal you will see the main Dashboard. In the top left corner there are icons to help you navigate between tabs: Dashboard, Quotes, Projects, Invoices and Reports.

In the top right corner there are the following buttons: Request a Quote, Launch a Project, Account Settings and Contact. Underneath them is an Add Widget button.



The main part of the Dashboard contains widgets which you can freely customize. Clicking on them will take you directly to a specific quote, project or invoice.

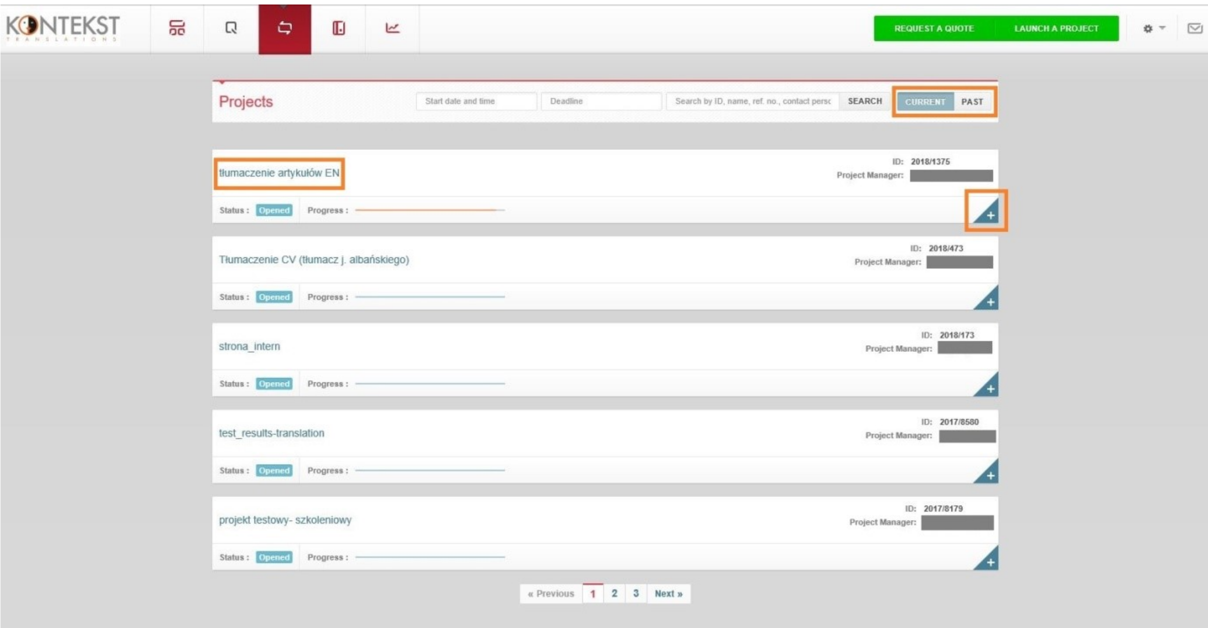
Additional panes can be installed by clicking the Add Widget button. By dragging and dropping the widgets you can rearrange them to suit your preferences. You can also delete a widget by clicking on the „X" button in its right-hand corner (in the main view).



Tabs

->watch video tutorial

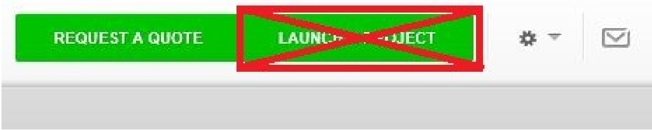
After clicking on one of the tab icons on the top left of the Dashboard screen, a list of tab-specific items will be displayed. You can narrow down the list by using the search bar at the top of the screen. Please note there are separate result lists for Current and Past items (to be selected at the right-hand side of the bar). If you click on a specific item, more information will be displayed and you will be able to download any deliverables related to this item.



Request a quote

-> watch video tutorial

In the top right corner of the Dashboard there is a green Request a Quote button (currently, the Launch a Project button is not operational). After you click on it, a 3-step quote form will pop up.

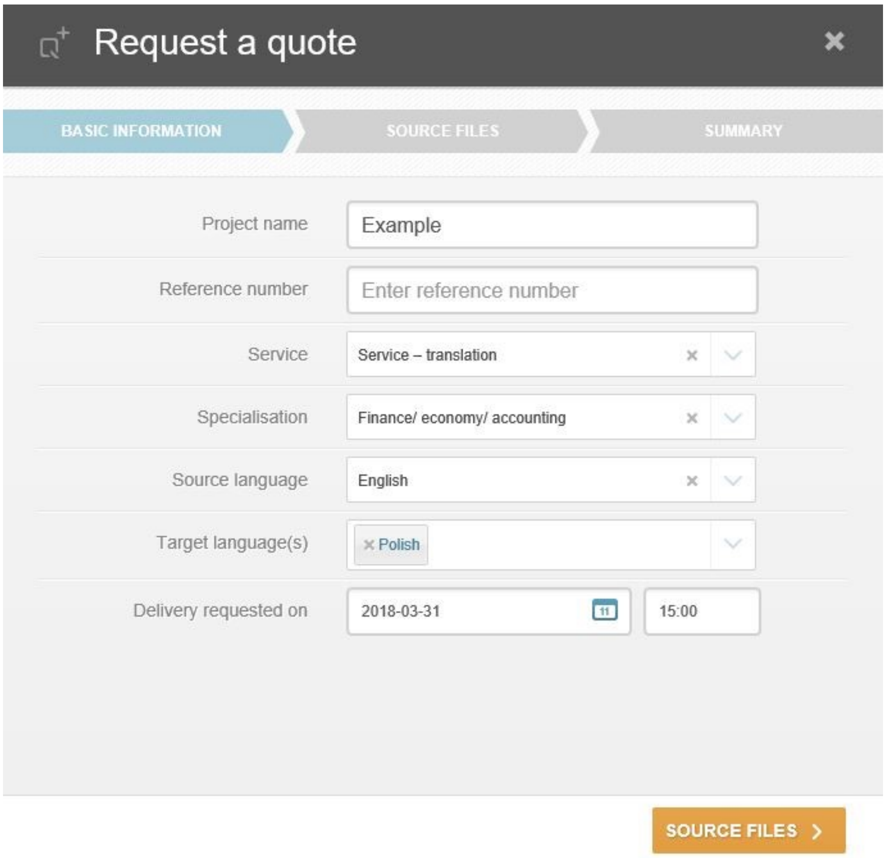


In „Basic Information" you fill in key data regarding your request.

If you are unsure which Specialisation your text belongs to, please leave it Unspecified.

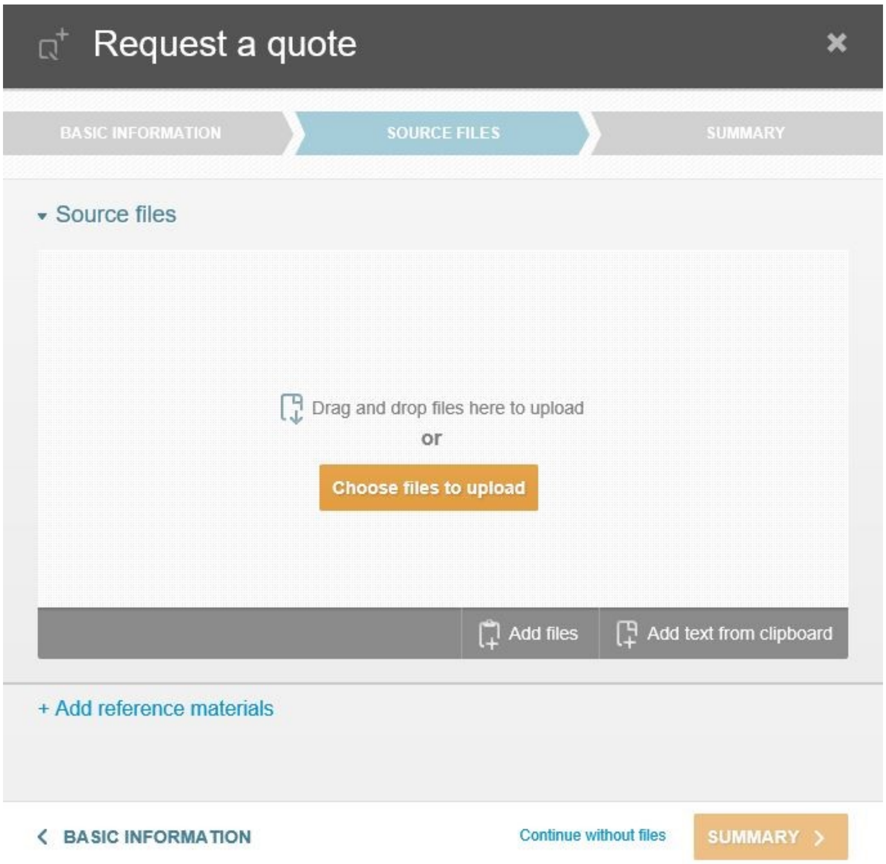
If you require a certified translation (by a sworn translator), please mark Service Type as „Service – translation – certified".

Fill in your preferred deadline (optional). Our Project Managers will take it into account when quoting your request and you will be provided a quote with three possible delivery dates.



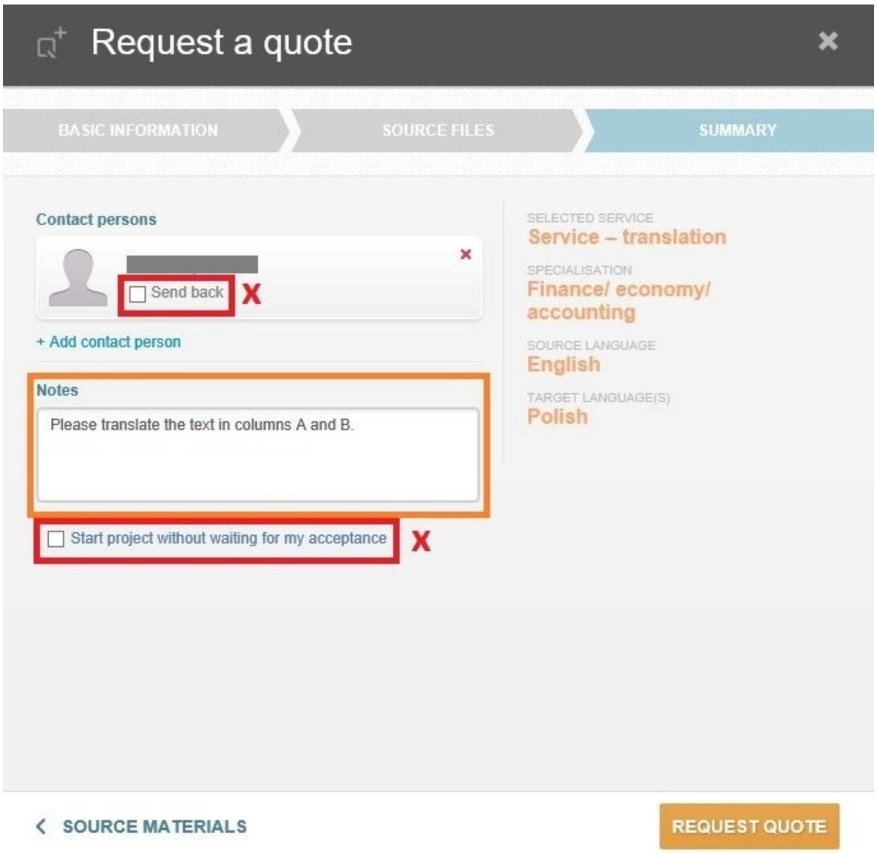
NOTE: If your organisation uses internal Purchase Order numbers, please add the relevant PO number as Reference Number. If you cannot obtain the PO number until after the quote, please send it over via email before your project closes.

Under „Source Files” you can add files to be translated or paste any source text from your clipboard. In this step you can also attach reference materials – detailed instructions or previous translations.



We recommend uploading editable files (for example: .doc, .ppt, .xls or .indd, as opposed to .pdf or .jpg) to speed up the translation process.

The last step is a summary of your request. Here you can choose contact persons from your company and add notes for the attention of our Project Managers (please see an example below). The contact persons will receive notifications regarding your request and will be able to download the deliverables once your project is ready. To complete the process, submit the form by clicking the REQUEST QUOTE button in the bottom right corner.

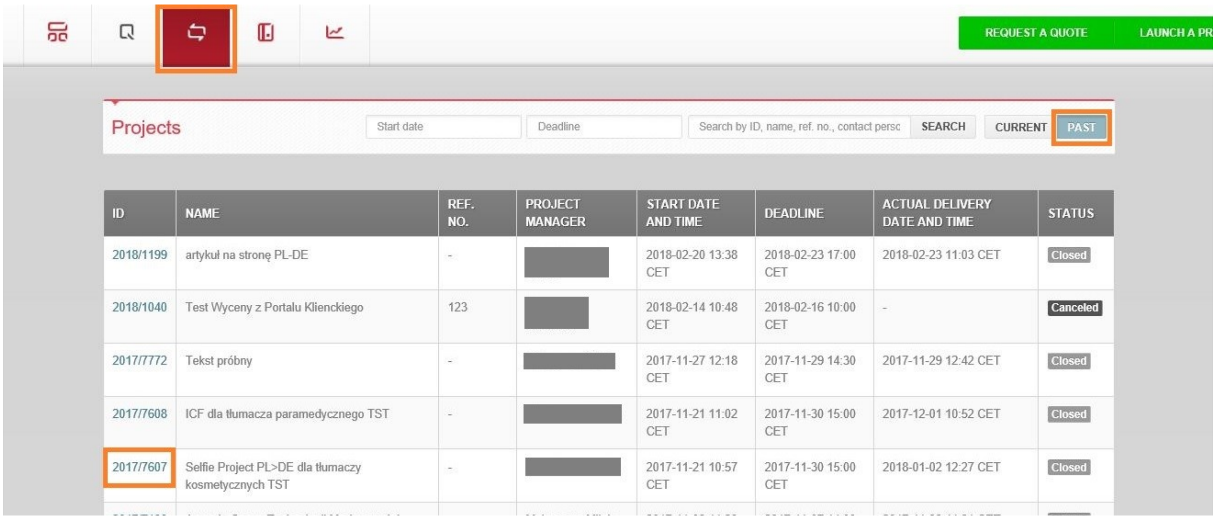


NOTE: If you tick the „Send back" box, which appears underneath any added contact person, the ready translation will be sent **only** to that person. Please do not use this option if you want all contact persons to receive the deliverables.

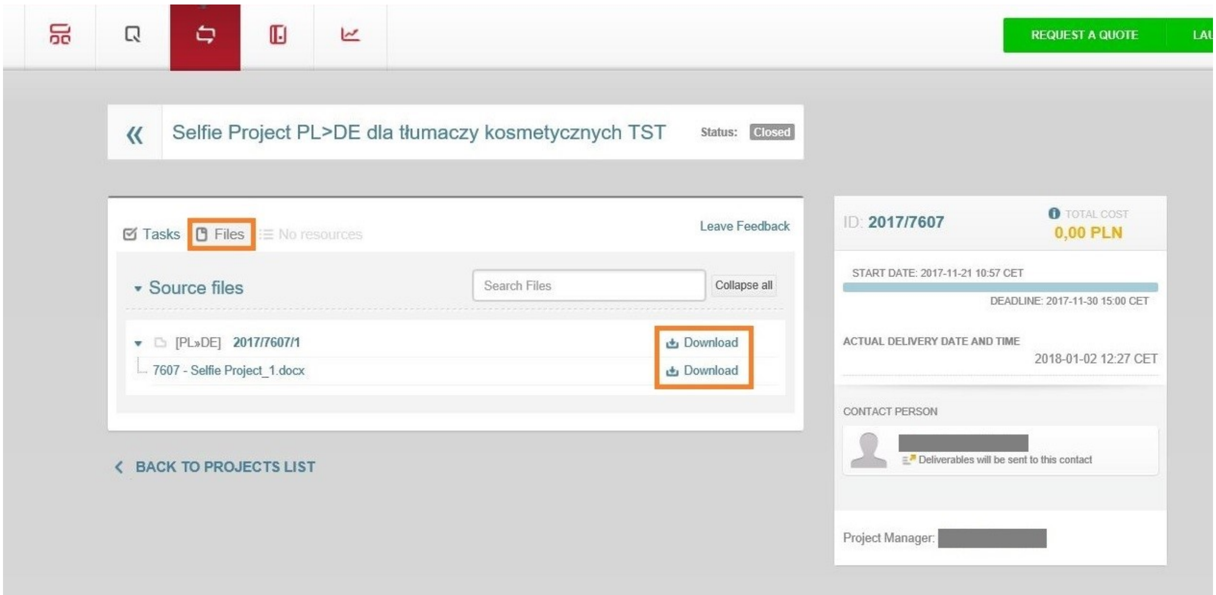
NOTE: Please **do not** tick the „Start project without my acceptance" option. The option is currently unavailable.

Downloading deliverables

As soon as the deliverables are ready, our Customer Service Department will send an email to all designated contact persons. Once you receive such an email, log in to Customer Portal and go to the Projects tab. Next, select the Past tab in the top right corner and click on the relevant project number in the ID column.

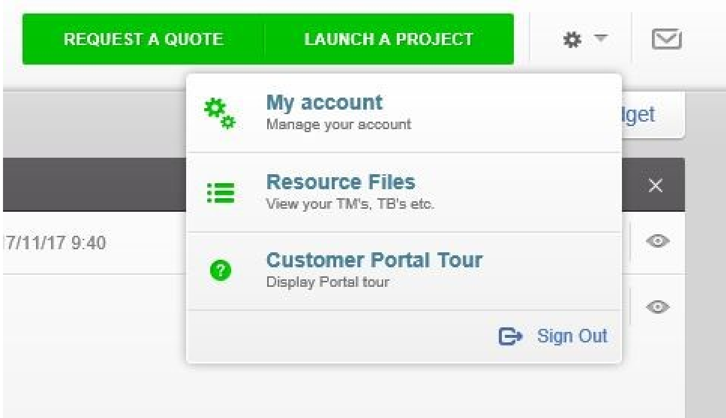


On the project page, open the Files tab, where you can download either all project deliverables or selected documents.



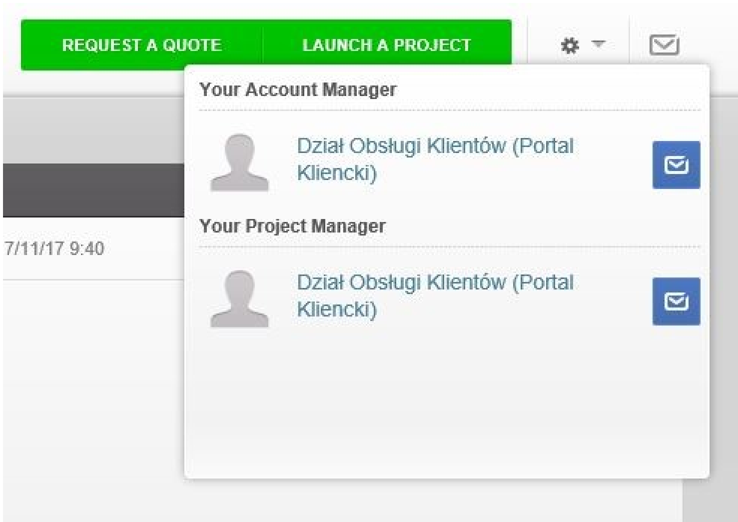
Account settings

Clicking on the cog icon in the top right corner of your Dashboard will open a drop-down list of options for your account. In the My Account tab you can change your password, contact details, language settings, or time zone. The Resource Files tab is only relevant for those customers who have provided KONTEKST with their translation memories, glossaries and other linguistic resources to be used across all their projects. The Customer Portal Tour is a short presentation on Customer Portal.



Contacting KONTEKST

In the top right corner of your Dashboard you will find an envelope icon. Via the links available under that icon you can send a message to our Customer Service Department (kontekst@kontekst.pl).



We hope you will enjoy using our Customer Portal and will be happy to assist you with any questions you might have.