

# CUSTOMER PORTAL USER GUIDE

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KONTEKST Translations  
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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?**

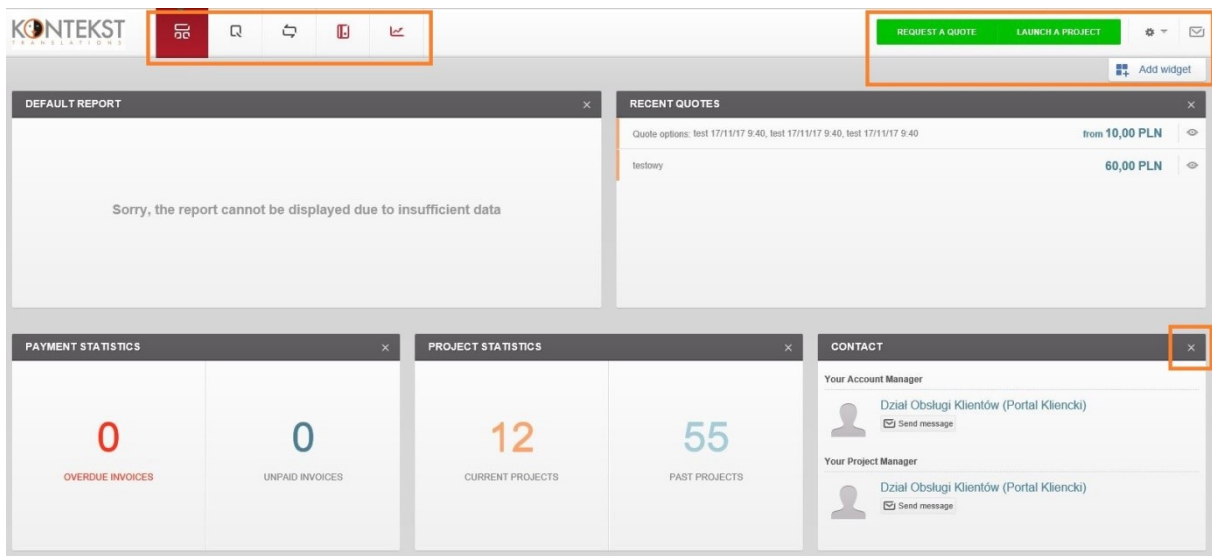
Please register your interest with our Customer Service Department ([kontekst@kontekst.pl](mailto:kontekst@kontekst.pl)). You will receive a welcome email with your login and password. Click on the link in the email to go to the Customer Portal login page.

## First login and Dashboard customization

-> [watch video tutorial](#)

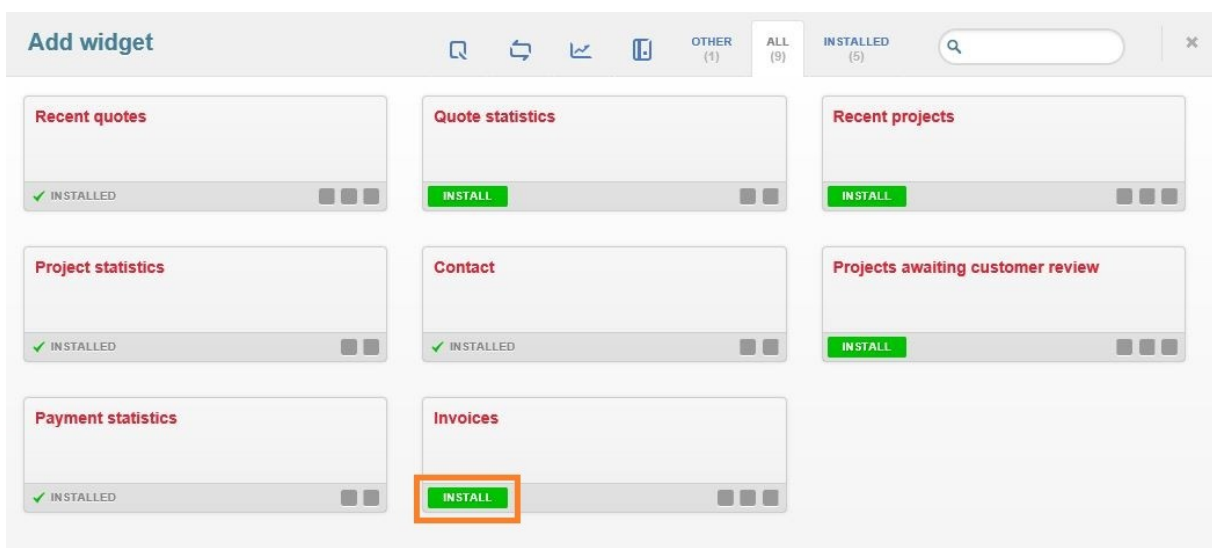
After you log in to Customer Portal you will see the main Dashboard. In the top left corner there are icons to help you navigate between tabs: Dashboard, Quotes, Projects, Invoices and Reports.

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.

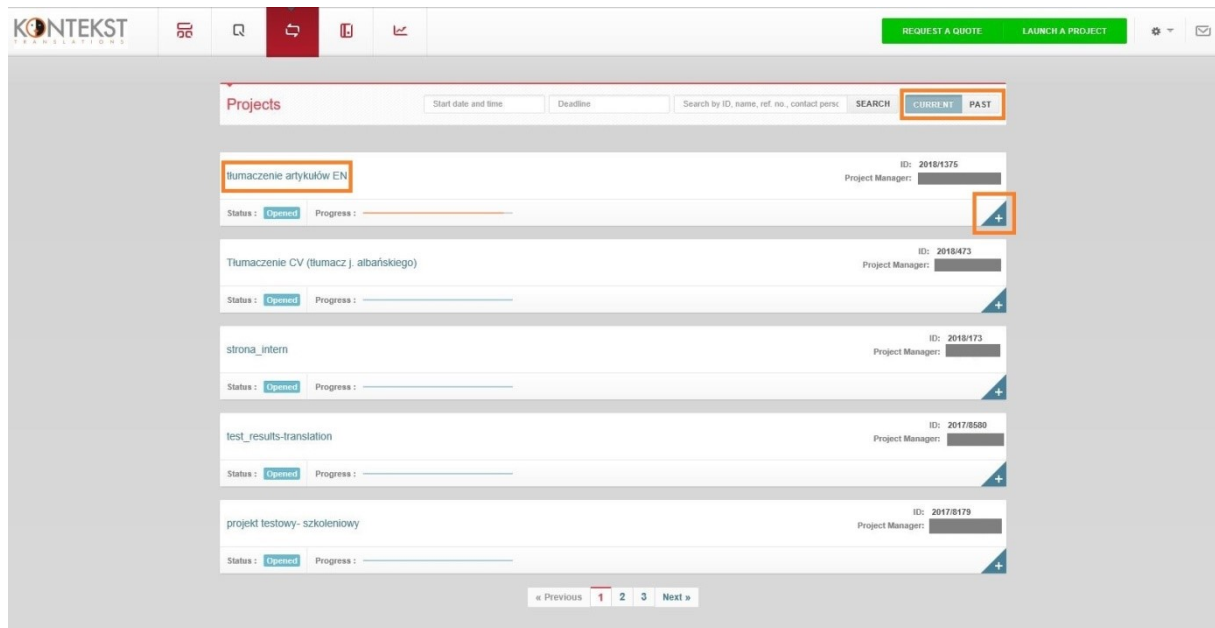
Additional panes can be installed by clicking the Add Widget button. By dragging and dropping the widgets you can rearrange them to suit your preferences. You can also delete a widget by clicking on the „X” button in its right-hand corner (in the main view).



## 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.

The screenshot shows a web interface titled "Request a quote" with a close button (X) in the top right corner. Below the title is a navigation bar with three tabs: "BASIC INFORMATION", "SOURCE FILES" (which is active and highlighted in blue), and "SUMMARY". Under the "SOURCE FILES" tab, there is a section titled "Source files" with a downward arrow icon. Below this title is a large light gray area with a grid pattern. In the center of this area, there is a text prompt "Drag and drop files here to upload" with a small icon of a folder and a downward arrow, followed by the word "or". Below this prompt is an orange button labeled "Choose files to upload". At the bottom of the grid area, there are two buttons: "Add files" and "Add text from clipboard", both with folder icons. Below the grid area, there is a link "+ Add reference materials". At the bottom of the interface, there is a navigation bar with three buttons: "< BASIC INFORMATION", "Continue without files", and "SUMMARY >".

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.

The screenshot shows the 'Request a quote' form with the 'SUMMARY' tab selected. The form is divided into two main sections: 'Contact persons' and 'Notes'. In the 'Contact persons' section, there is a card for a contact person with a 'Send back' checkbox, which is highlighted with a red box and a red 'X' icon. Below this card is a '+ Add contact person' link. The 'Notes' section has a text area containing the text 'Please translate the text in columns A and B.' and a checkbox labeled 'Start project without waiting for my acceptance', which is also highlighted with a red box and a red 'X' icon. On the right side of the form, there is a summary of the selected service: 'Service – translation', 'Specialisation: Finance/ economy/ accounting', 'Source Language: English', and 'Target Language(s): Polish'. At the bottom of the form, there is a '< SOURCE MATERIALS' link and a 'REQUEST QUOTE' button.

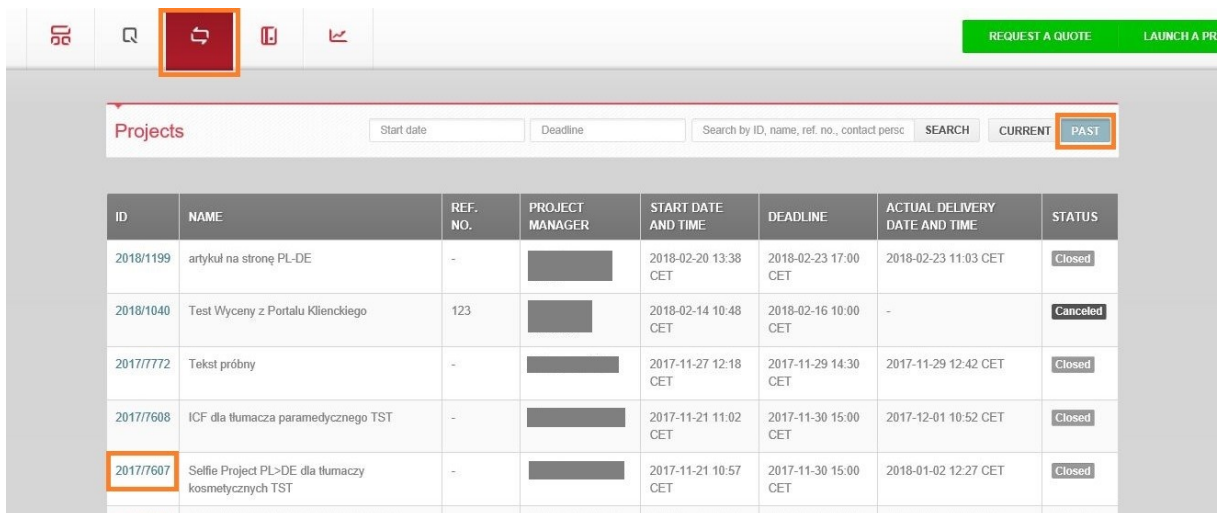
NOTE: If you tick the „Send back” box, which appears underneath any added contact person, the ready translation will be sent **only** to that person. Please do not use this option if you want all contact persons to receive the deliverables.

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



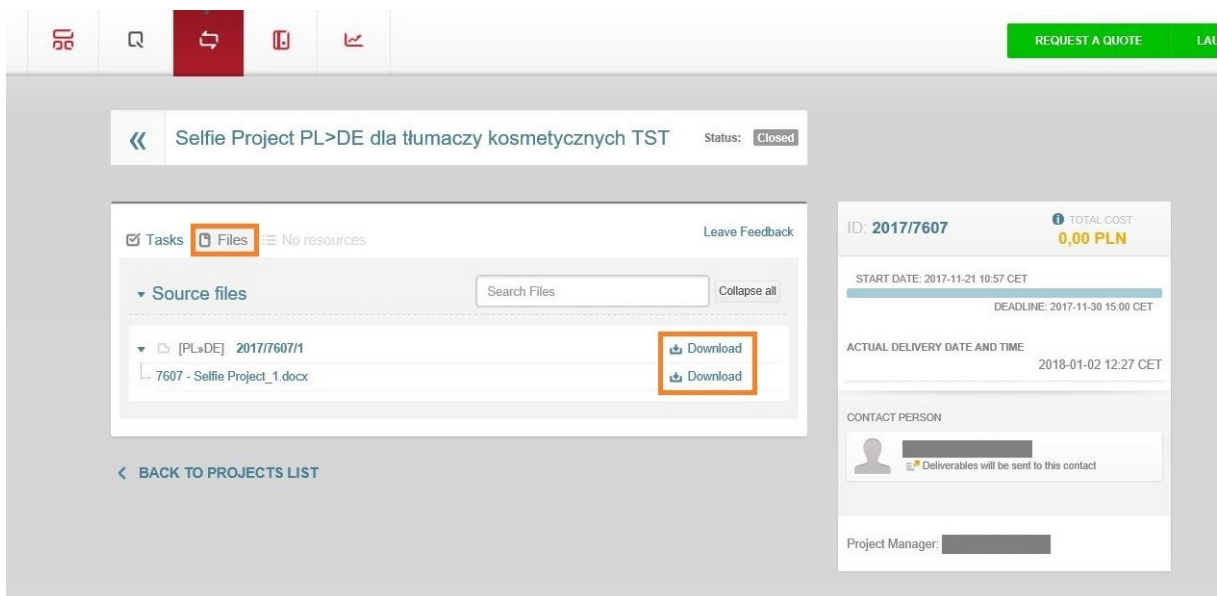
## Downloading deliverables

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.



ID	NAME	REF. NO.	PROJECT MANAGER	START DATE AND TIME	DEADLINE	ACTUAL DELIVERY DATE AND TIME	STATUS
2018/1199	artykuł na stronę PL-DE	-		2018-02-20 13:38 CET	2018-02-23 17:00 CET	2018-02-23 11:03 CET	Closed
2018/1040	Test Wyceny z Portalu Klientkiego	123		2018-02-14 10:48 CET	2018-02-16 10:00 CET	-	Canceled
2017/7772	Tekst próbny	-		2017-11-27 12:18 CET	2017-11-29 14:30 CET	2017-11-29 12:42 CET	Closed
2017/7608	ICF dla tłumacza paramedycznego TST	-		2017-11-21 11:02 CET	2017-11-30 15:00 CET	2017-12-01 10:52 CET	Closed
2017/7607	Selfie Project PL>DE dla tłumaczy kosmetycznych TST	-		2017-11-21 10:57 CET	2017-11-30 15:00 CET	2018-01-02 12:27 CET	Closed

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



Selfie Project PL>DE dla tłumaczy kosmetycznych TST Status: Closed

Tasks Files No resources Leave Feedback

Source files Search Files Collapse all

[PL>DE] 2017/7607/1 Download

7607 - Selfie Project\_1.docx Download

BACK TO PROJECTS LIST

ID: 2017/7607 TOTAL COST 0,00 PLN

START DATE: 2017-11-21 10:57 CET

DEADLINE: 2017-11-30 15:00 CET

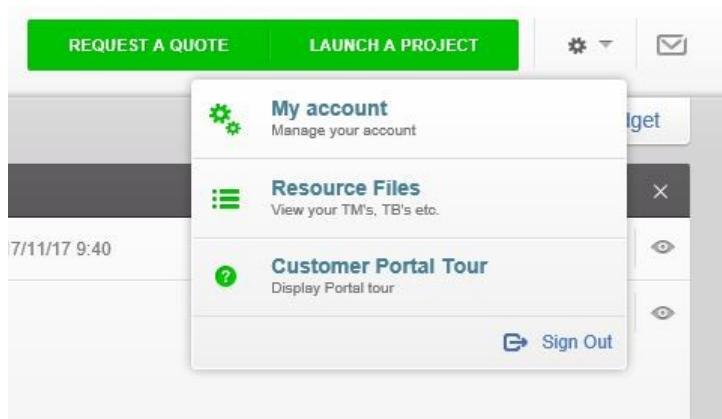
ACTUAL DELIVERY DATE AND TIME 2018-01-02 12:27 CET

CONTACT PERSON

Project Manager:

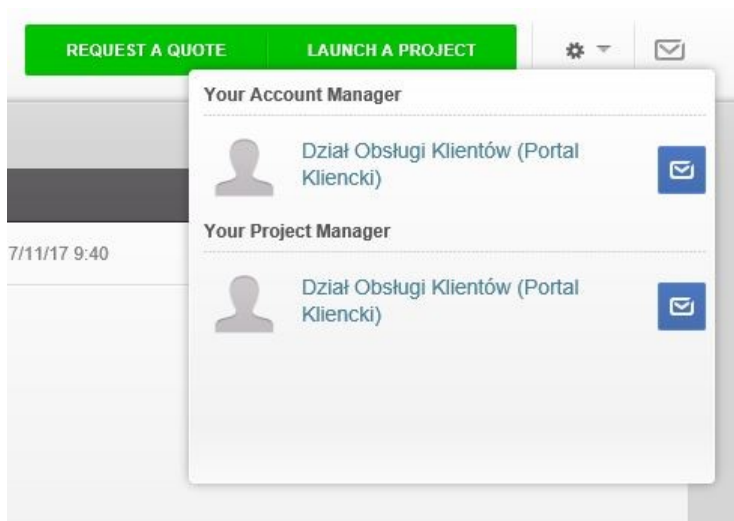
## Account settings

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](mailto: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.**