

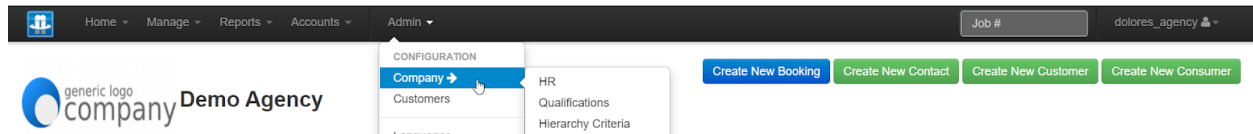
Notifications

When we manage bookings in Interpreter Intelligence, such as offering, assigning, confirming, updating etc., the system will send corresponding email notifications to the relevant roles/users on the booking. We can manage what notifications are sent and to whom as required for your agency.

Company Level Notifications

The majority of **Notifications** are held at the **Company Admin** level, however there are some that can be controlled at a lower level such as **Customer & Interpreter**, for now let's look at the Company level settings.

To access these settings go to the **'Admin'** menu and click **'Company'**.



You can then navigate to the 'Notifications' tab. There are quite a few settings here to allow for flexibility for your agency, some of these will be enabled or disabled by default being the most common setup for agencies but of course these can be tweaked according to your needs. Let's walk through each of these options. (*Quick tip: use the question mark icons to get help on these switches*)

- **Enable system audit notifications** – this switch would send emails on all changes to jobs, contacts and customer profiles. This setting will generate a lot of email and is not commonly used by many agencies except perhaps for short periods of time such as in the case of an audit or as a system archive.
 - ◆ System Audit Notifications - If the above setting is used it is recommended that the emails are routed to a dedicated inbox so as not to flood an inbox that is used for regular company notifications or day-to-day business for example.

- **Enable Company Notifications** - use this to receive emails to the company specified email address for regular activities in II such as New Booking, Assignment and/or Confirmation and Important Booking Update Notifications.
 - ◆ Cc Email - an additional email address to be cc'd on Company Notifications.
 - ◆ Bcc Email - an additional email address to be bcc'd on Company Notifications.
 - ◆ Reply to Email - you can provide a dedicated email for replies to all notifications, if this is blank, replies will go to the user who was logged in and created the booking.
 - ◆ Bcc for Quotation - a bcc address for any Quotation Notifications sent to ad hoc customers.
 - ◆ Bcc for Invoice - a bcc address for all Invoices sent from II.

- **Enable Customer Notifications** - use this to allow emails to be sent to customers for regular activities in II such as New Booking, Assignment and/or Confirmation and Important Booking Update Notifications. Note that you can switch off notifications for individual customers, see below for more information.
- **Enable Contact Notifications** - use this to allow emails to be sent to interpreters for regular activities in II such as New Booking offered, Assigned and/or Confirmation and Important Booking Update Notifications as well as certain reminder emails specifically for interpreters. Note that you can switch off certain notifications for individual interpreters, see below for more information.

Note that if for any reason you need to disable all notifications from the system, you can uncheck the 3 switches above - company, customer and contact notifications.

- **Enable Job Complete emails** – this will be a digest sent at the end of day notifying Requestor and Interpreter Manager that a job is complete. Job “complete” in this case does not mean closed, it means that the job is verified and fully financed.
- **Enable Confirmation Emails** - confirmation emails will be sent to all parties when a job is either assigned or confirmed as per sub switches below:
 - ◆ **Send Confirmation Emails on Assignment** - a confirmation email will be sent when a job has been assigned. Use this switch or the one below but not both.
 - ◆ **Send Confirmation Emails on Interpreter Confirmation** - a confirmation email will be sent when a job has been confirmed and not when it is assigned. Agencies typically use this switch when they require an interpreter to confirm a job after it has been assigned. Use this switch or the one above but not both.
- **Enable VoS Attachment** - this will attach the Verification of Service pdf form to the Interpreter Confirmation email so that they can download/print this in advance of the job.
- **Enable ics Attachment** - this will attach an .ics file to the Interpreter Confirmation email so that they can add the appointment to their own calendar outside of II (not their II portal calendar; the job will automatically be added to their portal calendar upon assignment).
- **Enable Important Updates Notifications** - this will allow Important Booking Update notifications to be sent when certain parameters on the job are updated i.e. start date, end date, language, service type, location, site contact, gender requirement.
- **Remind Confirm Bookings** - remind the interpreter to confirm the booking if this is an option that agencies are using (see Enable Confirmation Email options above). This email will automatically be sent in digest form at the end of day.
 - ◆ **Number of days, in the future, from today for Confirmation Reminders** - if this is set to 30, for example, it will remind them for all jobs within the next 30 days that need to be Confirmed.
- **Remind Interpreter Upcoming Bookings** - remind the **Interpreter** of bookings that they are assigned to. This email will automatically be sent in digest form at the end of day.

- **Remind Customer Upcoming Bookings** - remind the **Requestor** of bookings that they have requested (where they are listed as **Requestor** on the Booking). This email will automatically be sent in digest form at the end of day.
 - ◆ **Number of days, in the future, from today for Upcoming Reminders** - if this is set to 2, for example, it will remind **Interpreters** and/or **Requestors** for all jobs assigned within the next 2 days. Note that this setting applied to both **Interpreter** and **Requestor** reminders.

- **Remind to Close Bookings** - remind the interpreter of assignments in the past that need to be closed if it is required that interpreters will close jobs. This email will automatically be sent in digest form at the end of day.
 - ◆ **Number of days, in the past, from today for Close Reminders** - if this is set to 30, for example, it will remind them for all jobs within the last 30 days that need to be closed.
 - ◆ **Age (days) of bookings reminded to be closed** - this is a grace period for job close reminders; if this is set to 2, for example, it will provide a grace period of 2 days between the assignment and when the interpreter will be reminded to close it.

- **Enable email to SMS** – this is a legacy field and is not used.

- **Days prior to expiration notice (Employment Eligibility)** - if you select to Notify Interpreters on the expiration of Eligibilities & Qualifications, use this field to determine the number of days ahead of expiry date to send the notification.

- **# Minutes Prior for Scheduled Video Reminder** – when using the Video (Scheduled) service, a reminder with a link to the video session will be sent prior to the assignment, if this is blank, the default of 60 minutes prior will be applied. If changing this, it is important to note that you must use minutes.

- **# Minutes Prior for Scheduled Phone Reminder** – when using the Phone (Scheduled) service, a reminder with a link to the call will be sent prior to the assignment, if this is blank, the default of 60 minutes prior will be applied. If changing this, it is important to note that you must use minutes.

- **Email Templates** - this allows you to select newly created templates as the template that will be used to send all respective Notifications at the Company level. Each template already has a system default associated with it but you can change this by selecting the dropdown menu next to the relevant template and selecting the newly created template that you wish to apply. Further instructions are available in the Templates user guide.

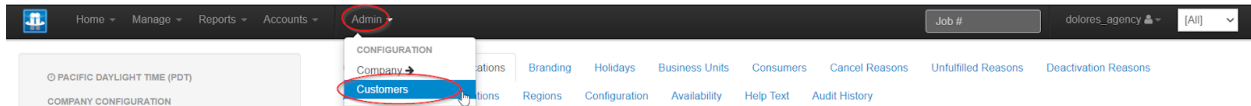
- **Schedule "Unfilled Jobs" Notifications** - this will allow you to automatically schedule Notifications to Customers for Jobs that have not yet been assigned (New, Open, Offered status) within a scheduled time frame prior to the Expected Start Date/Time of the Job. Further instructions are available in the Templates user guide.

When you make any changes to the Notifications, be sure to click the blue 'Save' button on the left hand navigation pane to save the Configuration.

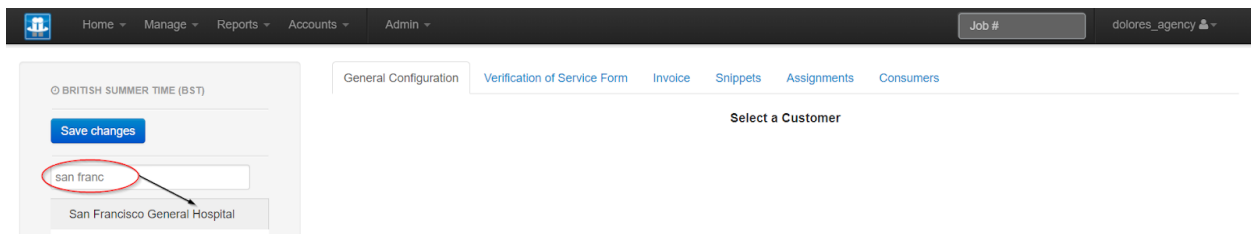
Customer Notifications

All of the settings as outlined above under Admin->Company->Notifications will apply at an all system level, however, you can make certain changes at an individual Customer level.

Navigate to the 'Admin' menu and select 'Customers'.



Start typing the name of the Customer you wish to review/modify and simply select the customer from the filtered results.



On the General Configuration tab, navigate to the Customer Notifications section. You will notice that you can:

- Enable email notifications - switch on/off all notifications for this customer.
- Notify Creators - Cc the creators of a job on all job notifications.
- Notify Job Complete - notify Requestor and Interpreter Manager when a job is Complete.
- Cc Email address for Notifications - add a customer Cc address for all notifications.
- Assign Customer specific Templates - you can create new Templates with a specific format/content that can then be assigned to a Customer and will be used as the template for any Notifications specifically for this Customer. You can also Schedule automatic Unfilled Notifications at the Customer level. Further instructions are available in the Templates user guide.

BRITISH SUMMER TIME (BST)

Save changes

san fran

San Francisco General Hospital

General Configuration

Time Zone [Select a Timezone/Override Company Timezone]

Radius for Automated Assignment *

Enable Sublocations? Enable VoS Required? Enable eSignature Required?

Financial Configuration

Invoice / Report Grouping * Enable Invoice Landscape

[Choose a Grouping]

Customer Notifications

Enable email notifications? Notify Creators? Notify Job Complete?

Cc Email Address for Notifications

Email

As always, remember to save after any changes are made.

Interpreter notifications

You can also make some Notification adjustments if required at an individual Interpreter level. Navigate to Manage -> Manage Contacts. Search for the required interpreter and using the dropdown arrow at the relevant interpreter, select Edit (in full). On the General Information tab, under the Contact Details section, you can make a number of modifications to the default notification settings:

- Disable Confirm Booking Reminders - Interpreter would not receive the end of day digest on bookings that must be confirmed.
- Disable Upcoming Booking Reminders - Interpreter would not receive the end of day digest on upcoming bookings.
- Disable Close Booking Reminders - Interpreter would not receive the end of day digest on bookings that must be closed.
- Disable Confirmation Emails - Interpreters would not receive Job Confirmation emails.
- Disable Auto Job Offer Emails - when using the Auto Offer feature, Interpreters would not receive emails regarding these offers but would need to respond to these via the Interpreter Portal.
- Exclude from Auto Job Offer - when using the Auto Offer feature, Interpreters would not receive any auto offers at all either via email or via their portal, i.e. Interpreters may only receive manual offers.

Disable Confirm Booking Reminders? ?

Disable Upcoming Booking Reminders? ?

Disable Close Booking Reminders? ?

Disable Confirmation Emails? ?

Disable Auto Job Offer Emails? ?

Exclude from Auto Job Offer? ?

As always, remember to save after any changes are made.

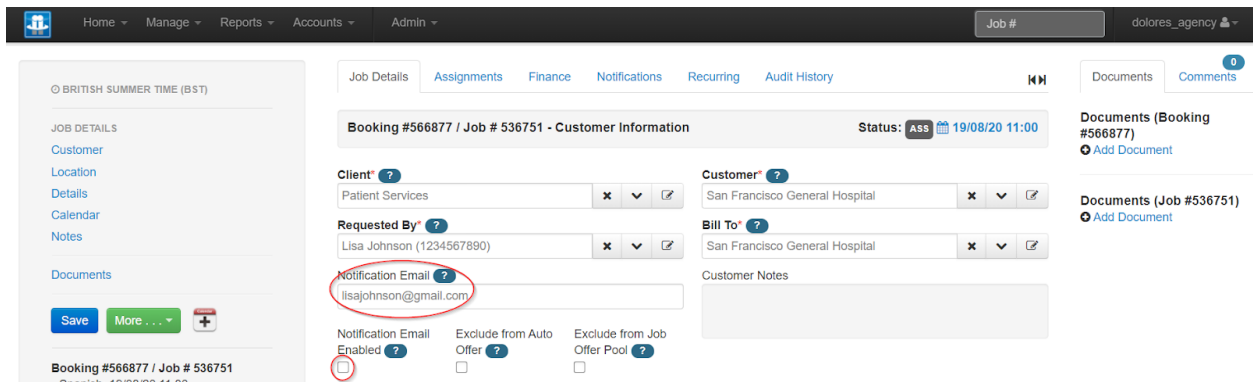
Requestor & Booking Notifications

Finally you can make some modifications to Requestor and other Notifications at a Booking level.

When creating a new booking/job and/or updating an existing booking/job, you will notice in the Customer Information section that the Requestor email (if stored on their profile) will automatically be added to the Notification Email field and that, providing Notifications are enabled for this Customer, the Notification Email Enabled flag will be checked by default.

If you wish to disable notifications for the Requestor you can either remove their email address from Notification Email field or you can disable the Notification Email Enabled flag.

Similarly, if you wish to add parties to be notified on the individual booking/job level you can add a comma separated list to the Notification Email field. This would commonly be used for Video (Scheduled) appointments for example, when other parties may need to attend the video call and will need to receive the Video Ready email notification which includes the link to the video call.



In Summary, you can manage job Notifications at a Company, Customer, Contact and Job level and remember that you can see a record of all notifications sent on a particular job by going to the Notifications tab of the job itself.

Email issues/Bounces

Occasionally an Email notification from II may not be received by a user for a number of reasons, such as the user's email server was not reachable or marked the email as Spam. In these cases a Notification error will be sent to your Agency's From email address Inbox. Your From Email address is the address that you will provide to II when you first setup II and this is the From Email address for all Notifications that are sent from II to relevant users (**Customers, Interpreters** etc.).

If you receive any such Notification Errors it is important that you send these to support@interpreterintelligence.com so that we can reactivate the user's email address. If this

is not done the user may not receive any further notifications from II. Therefore it is important to monitor your From email address Inbox to catch any such errors.

SMS Notifications

If sms has been enabled for your agency, any sms notifications will be triggered manually, for example by sending an ad hoc sms message, offering jobs via sms etc., therefore there are no specific configuration options for sms notifications. We will however look at sms in more detail in the Template document.