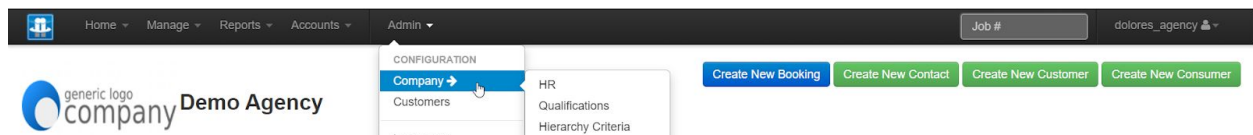


Cancel, Unfulfilled & Deactivation Reasons

When a job is Cancelled or Unfulfilled we can select a reason for this, similarly when an Contact/Interpreter is deactivated we can select a reason.

All of these reasons can be setup and managed for your agency according to your needs.

To manage these Reasons, go to the '**Admin**' menu and select '**Company**'.



Cancel Reasons

To access these simply click on the **Cancel Reasons** tab.

To setup Cancellation Reasons:

- Click on the '**Add Cancellation Reason**' link
- Give the Reason a **Name** - this is what will be visible in the Cancellation Reason drop down box when a user Cancels a job so it is important to provide a meaningful name
- Provide a **Description**
- If you wish this cancellation reason to be available when cancelling jobs, check the **Enabled** box - in the future if you wish to disable this you can uncheck the **Enabled** box
- There are a number of additional optional checkmarks:
 - ◆ **Enabled for Customer** - checking this box will mean that the reason is available to Customers using the portal - you may have some reasons that are strictly for internal use and you may not wish Customers to use these
 - ◆ **Enabled for Interpreter** - similarly, checking this box will mean that the reason is available to Interpreters using the portal
 - ◆ **Create Interaction** - checking this box will mean that everytime a job is cancelled an Interaction will be created (under '**Manage**' -> '**Manage Interactions**') so that as an agency you can separately analyse and manage any issues that may cause a cancellation.
 - ◆ **Billable** - checking this box means that a job cancelled with this reason will be billable to your customer providing that the Cancellation Fee rules are met as set on the Rate Plan (more on this in the Financial user guides)
 - ◆ **Payable** - similarly, checking this box means that a job cancelled with this reason will be payable to your interpreter
- Finally click the '**Save**' link on the right hand side to save this reason

→ To setup any additional Cancellation Reasons, simply click on the '**Add Cancellation Reason**' link again and be sure to Save each reason as you create it

COMPANY CONFIGURATION

Company Details
Contact Information
Addresses

Save

Name (ID)
Demo Agency #20
Last Modified By
dolores_agency
Last Modified
28/08/20 13:19
Created By
admin@interpreterintelligence.com
Created
02/05/13 05:01

Company Details Notifications Branding Holidays Business Units Consumers **Cancel Reasons** Unfulfilled Reasons

Deactivation Reasons Action Groups Organizations Regions Configuration Availability Help Text Audit History

Cancellation Reasons

Reason * ? Description * ? Enabled ?

Normal cancellation Normal cancellation

Enabled For Customer ? Enabled For Interpreter ? Create Interaction ? Billable ? Payable ? Save

Reason * ? Description * ? Enabled ?

Consumer did not attend Interpreter arrived at the appointment t

Enabled For Customer ? Enabled For Interpreter ? Create Interaction ? Billable ? Payable ? Save

Add Cancellation Reason

If you choose to **Cancel** a job now, you will see that the **Cancellation Reasons** that have been saved are available to choose in the **Cancellation Reasons** drop down box and that the **Billable** and **Payable** flags will be set automatically according to the reason selected. Note that you can override the **Billable** and **Payable** flags on any given job cancellation if that is required.

Cancel Booking

Please select the reason for the cancellation in this field: * ?

Consumer did not attend

[Choose a Cancellation Reason]

Normal cancellation

Consumer did not attend

Billable * ? Yes

Payable * ? Yes

Do NOT send cancellation email ?

Cancel Booking Close

Unfulfilled Reasons

To access Unfulfilled Reasons, go back to the **'Admin'** menu and select **'Company'** and click on the **Unfulfilled Reasons** tab.

To setup Unfulfilled Reasons:

- Click on the **'Add Unfulfilled Reason'** link
- Give the Reason a **Name** - this is what will be visible in the Unfulfilled Reason drop down box when a user chooses to **Can't fulfill** a job so it is important to provide a meaningful name
- Provide a **Description**
- If you wish this unfulfilled reason to be available when unfulfilling jobs, check the **Enabled** box - in the future if you wish to disable this you can uncheck the **Enabled** box
- Finally click the **'Save'** link on the right hand side to save this reason
- To setup any additional Unfulfilled Reasons, simply click on the **'Add Unfulfilled Reason'** link again and be sure to Save each reason as you create it

The screenshot displays the 'Unfulfilled Reasons' configuration interface. On the left, a sidebar contains navigation links for 'Company Details', 'Contact Information', and 'Addresses', along with a 'Save' button. The main content area features a table with three rows of reasons. Each row includes a 'Reason' field, a 'Description' field, an 'Enabled' checkbox, and a 'Save' button. The 'Add Unfulfilled Reason' link at the bottom is circled in red. The 'Unfulfilled Reasons' tab in the top navigation bar is also circled in red.

Reason *	Description *	Enabled ?	Action
Rare Language	Rare Language	☒	Save
Distance	Distance	☒	Save
Out of Hours	Out of Hours	☒	Save / Delete

If you choose to **Can't fulfill** a job now, you will see that the **Unfulfilled Reasons** that have been saved are available to choose in the **Unfulfilled Reasons** drop down box.

Can't Fulfill Job



Please select the reason for the visit being unfulfilled in this field: * ?

[Choose an Unfulfilled Reason] v

[Choose an Unfulfilled Reason]

Rare Language

Distance

Out of Hours

...ining the booking in this field:

Do NOT send can't fulfill email ?

☐

Can't Fulfill Job

Close

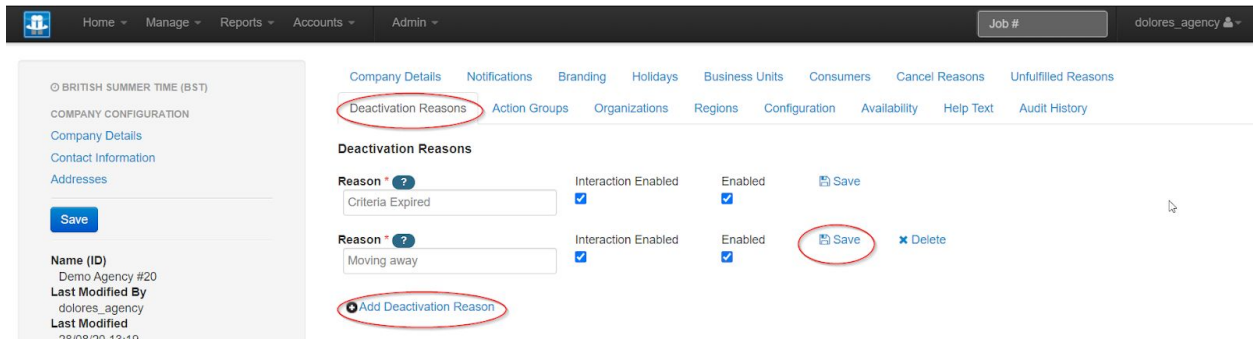
Deactivation Reasons

To access Deactivation Reasons, go back to the '**Admin**' menu and select '**Company**' and click on the **Deactivation Reasons** tab.

To setup Deactivation Reasons:

- Click on the '**Add Deactivation Reason**' link
- Give the Reason a **Name** - this is what will be visible in the Deactivation Reason drop down box when a user chooses to **Inactivate** a Contact/Interpreter so it is important to provide a meaningful name
- If you wish this Deactivation reason to be available when deactivating an Interpreter, check the **Enabled** box - in the future if you wish to disable this you can uncheck the **Enabled** box
- There is also the option to have an **Interaction Enabled** - checking this box will mean that every time that an Interpreter is Inactivated an Interaction will be created (under '**Manage**' -> '**Manage Interactions**') so that as an agency you can separately analyse and manage these if necessary.
- Finally click the '**Save**' link on the right hand side to save this reason

→ To setup any additional Deactivation Reasons, simply click on the '**Add Deactivation Reason**' link again and be sure to Save each reason as you create it



If you need to Deactivate an Interpreter, Navigate to the '**Manage**' menu and select '**Manage Contacts**' in the Contacts section. Search or filter for the required Interpreter and select the drop down menu next to their record and select **Change Status**, choosing **Inactive** from the **Next Status** menu will reveal the **Deactivation Reason** menu and you can then choose from a list of reasons that you have just setup

Contact Status Change

Interpreter:

Current Status: Active

Next Status:

From Date

To Date

To Time

Notes

Deactivation Reason:

Select one...
Select one...
Moving away
Criteria Expired

Status Change

close