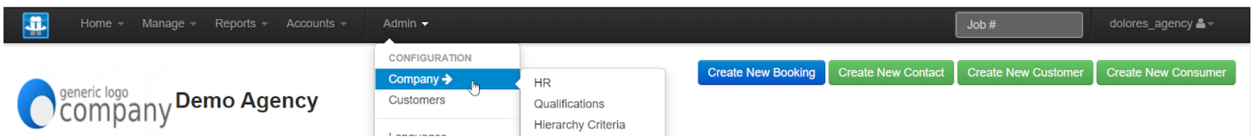
Reference Fields

Reference Fields are Custom fields that we can use to collect any additional information during the job creation or the job closing process. Depending on how they are set up, reference fields will then appear on the job creation or the job closure pages.

Reference fields can be set up at an all-agency or Company level, in which case they will apply to all jobs for all Customers, and/or they can be set up at a Customer level in which case they would only appear on jobs related to the specific Customer.

Company Reference Fields

To manage Company level Reference Fields, go to the **'Admin'** menu and select **'Company'**.

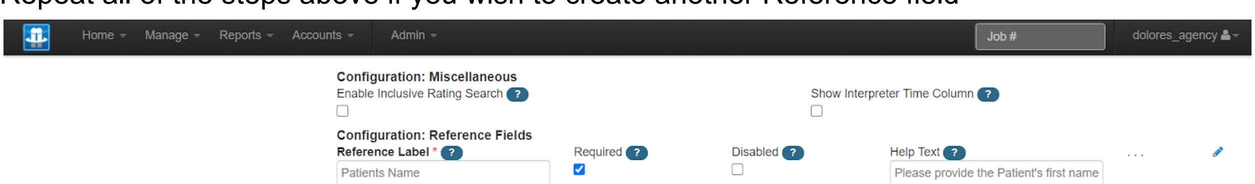


- Click on the **Configuration** tab
- Go to the bottom of the page to the section **Configuration: Reference Fields**

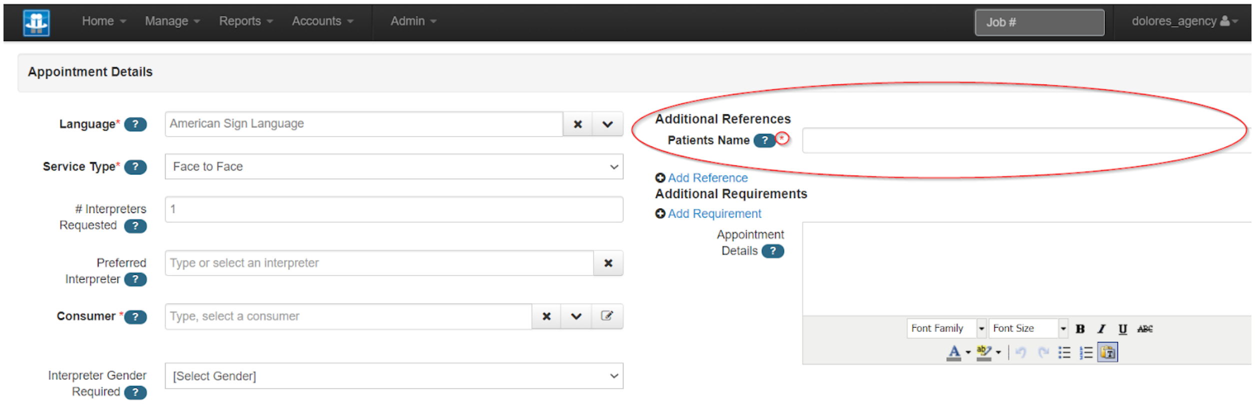
Creating a basic Reference Field

- ➔ Click on the **Add Reference** link
- ➔ **Reference Label** - this is the name that will appear on the reference field on the job page
- ➔ **Required** - checking this box will mean that the reference field must be populated by the user creating the job
- ➔ **Disabled** - checking this will disable the reference field if that is required in the future, the field will therefore no longer appear on the job page
- ➔ **Help Text** - this is the text that will appear on the question mark icon **?** when the user hovers over it, use this to provide any supplementary information to the user creating the job and populating the field
- ➔ Save the Reference by clicking on the blue **Save** button in the top left navigation pane

Repeat all of the steps above if you wish to create another Reference field



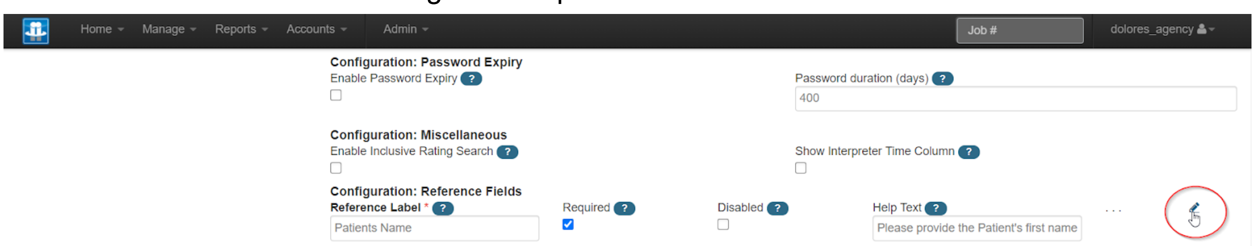
If you create a new job now you will see that the Reference field(s) just created will appear as an **Additional Reference** in the **Appointment Details** section of the job page. If the Reference was set as **Required**, you will notice that it also has a red asterisk * meaning that it must be populated.



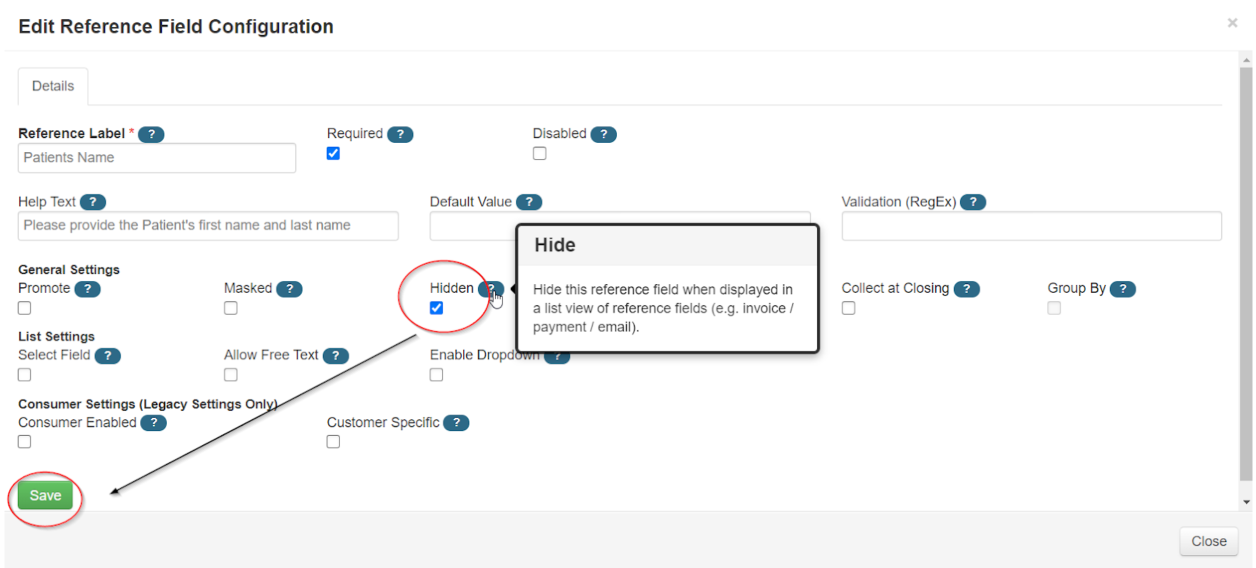
Creating a Hidden Reference Field

Setting a Reference Field to Hidden will mean that the data collected in the field will not be displayed in certain communication where references may be listed such as email notifications, invoices and payments, therefore this is useful where the data collected is sensitive or confidential in nature.

➔ Follow all of the steps as above for **Creating a basic Reference Field**
➔ When you have Saved the Configuration as per the final step, click on the **Edit/Pencil** icon to access more configuration options



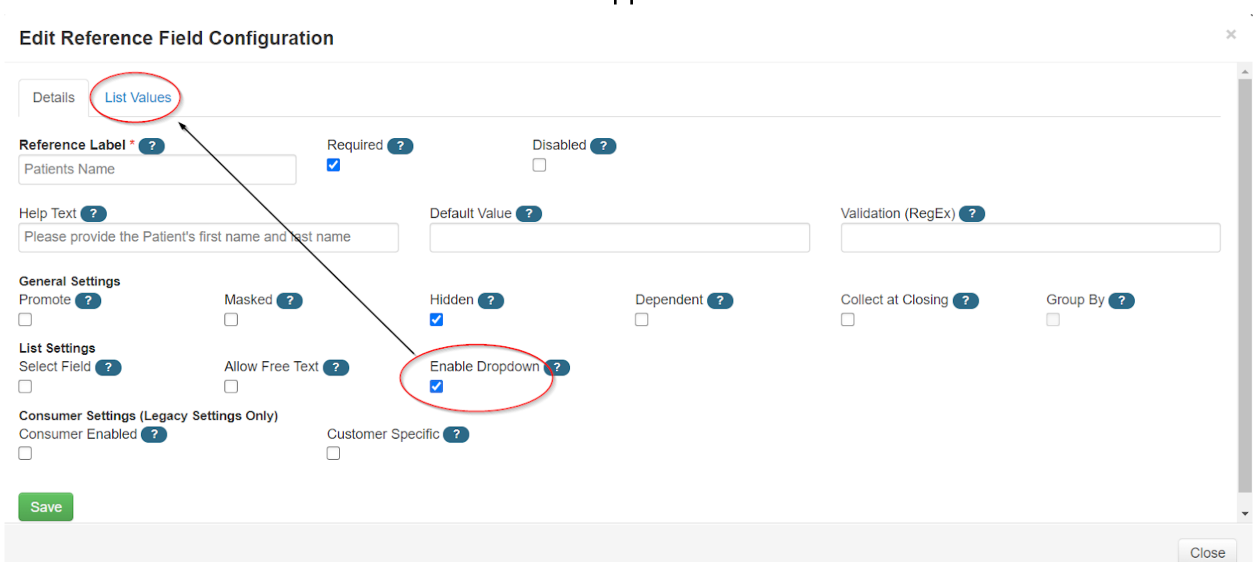
➔ Select the **Hidden** checkbox (note that the Question mark icon **?** will provide help text for this and all other options)
➔ Click on the green **Save** button



Creating a Reference Field with a drop down list

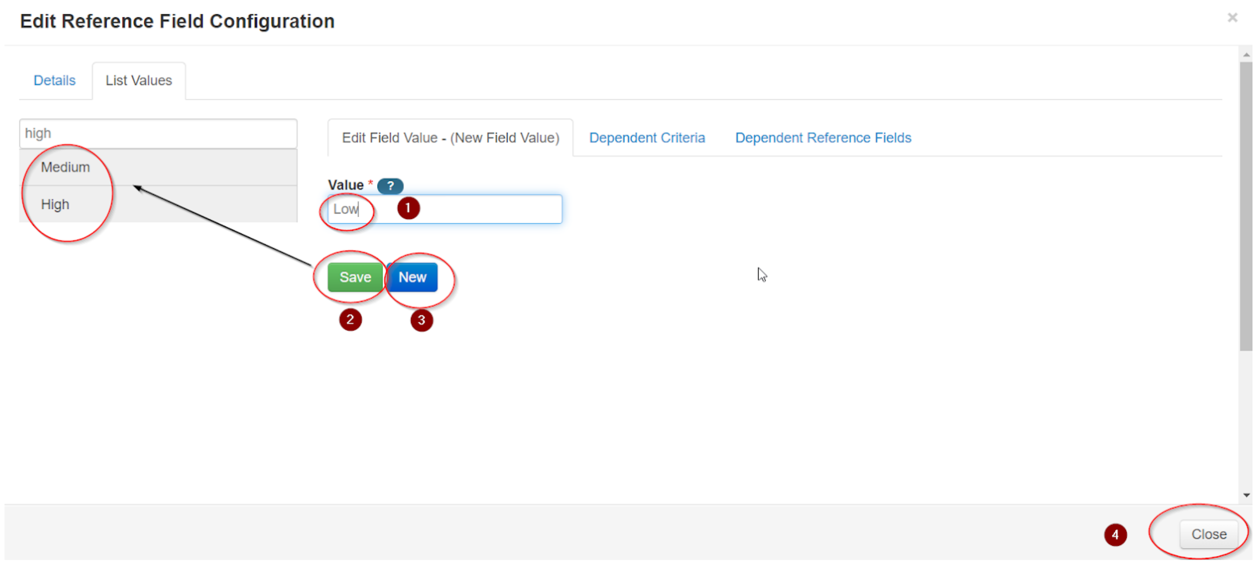
This configuration will allow you to create a reference field with a predefined list of values that users creating jobs would choose from as opposed to entering free form text.

- ➔ Follow all of the steps as above for **Creating a basic Reference Field**
- ➔ When you have Saved the Configuration as per the final step, click on the **Edit/Pencil** icon to access more configuration options
- ➔ Select the **Enable Dropdown** checkbox (note that the Question mark icon **?** will provide help text for this and all other options)
- ➔ Enabling the **Select Field** option on a dropdown **Reference Field** will also allow users to start typing values rather than scrolling through the list, this is particularly useful if there are a lot of list values
- ➔ You will notice that a new tab will then appear in the window called **'List Values'**



- ➔ Click on this **List Values** tab
  - ◆ Enter a value that you wish to appear in the drop down
  - ◆ Click on the green **Save** button

- Click on the blue 'New' button and enter another value
- Each time that you save a value, note that it will appear in the list on the left hand side
- Repeat this process until you have entered all values that are required for the drop down list



➔ Finally, return to the **Details** tab and click the green **Save** button

Creating Dependent Reference Fields

You can Create Dependent Reference Fields so that a value chosen in a drop down list for one Reference Field can activate a second Reference Field that also needs to be populated.

➔ Create 2 Reference fields as per above for **Creating a basic Reference Field** and save the Configuration using the blue **Save** button in the top left navigation pane

➔ Edit the first Reference Field and **Enable Dropdown** and create the List Values as per the steps for **Creating a Reference Field with a drop down list** and click the the green **Save** button

➔ Edit the second Reference Field and enable **Dependent** and click the Green **Save** button.

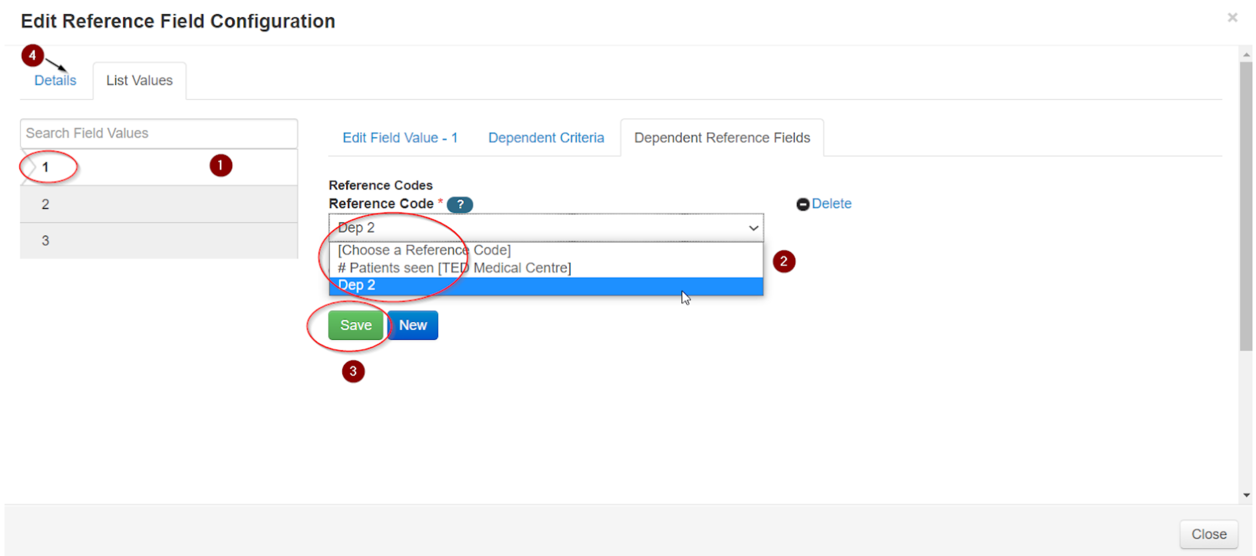
➔ Edit the first Reference Field again and go to the **List Values** tab :

- select a drop down list value on the left hand side which would activate the second Dependent Reference Field and then the go to the **'Dependent Reference Fields'** tab
- click on **'Add reference code'** and select the second Reference Field from the dropdown list
- click on the green **Save** button
- you can repeat the above process for any other list values within the first Reference Field that will activate the second Reference Field and always click on the green **Save** button

➔ When complete, go back to the **Details** tab and click on the green **Save** button to save the overall Reference Field configuration

➔ Note that the second Reference Field can also be configured as a dropdown list if preferred

➔ Also, it is good to know, you can create multiple Dependent Reference fields, for example, your first Reference Field might have 5 list values and each of these values triggers/has a Dependent Reference field. Simply create all of the required Dependent Reference fields to begin with, set them to Dependent and then repeat the steps in the first Reference field above to associate each list value with the appropriate Dependent Reference field.



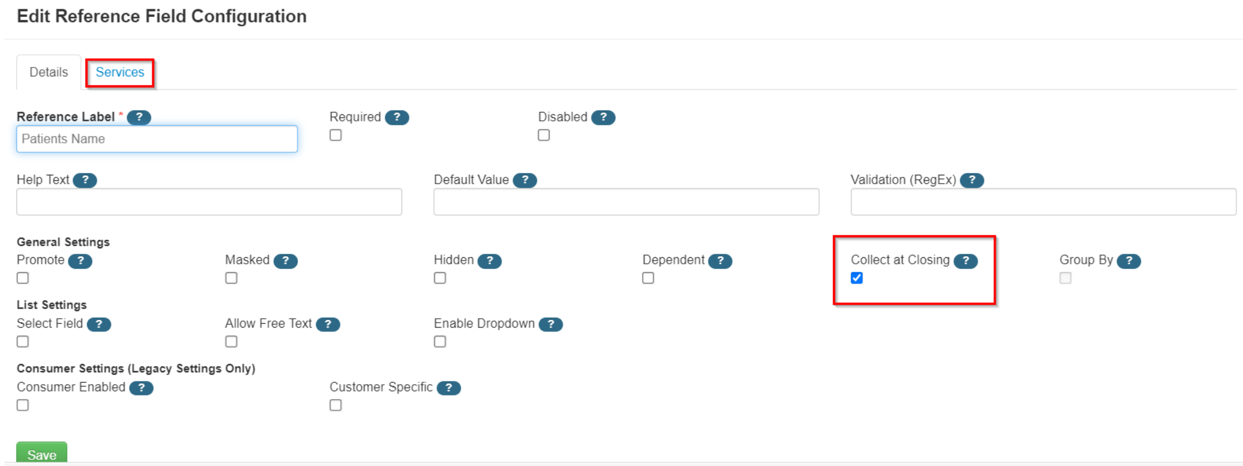
Creating Reference Fields with Dependent Criteria

You can also create Reference Fields that will automatically add criteria such as Eligibilities and Qualification to jobs. This is particularly useful if you have categories of appointments that will always require a corresponding qualification such as Medical and Legal appointments and using Dependent Criteria will ensure that the corresponding criteria are always added to the job rather than instructing staff to add these criteria.

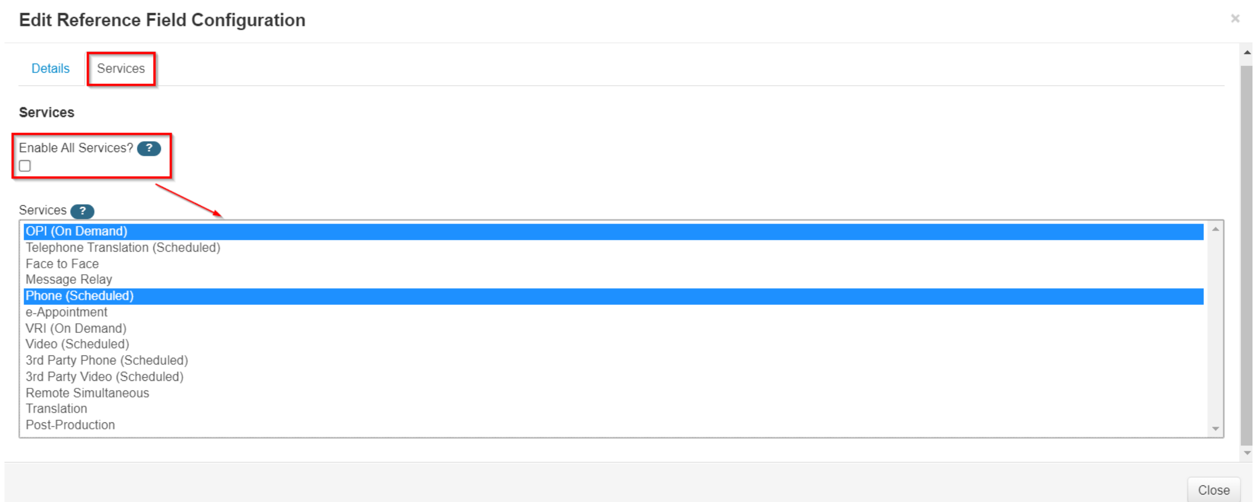
➔ Follow the instructions above for **Creating a Reference Field with a drop down list**
➔ Return to the **Details** tab and click the green **Save** button
➔ Return to the **List Values** tab
  ◆ select a drop down list value on the left hand side and then the go to the **'Dependent Criteria'** tab
  ◆ click on **'Add eligibility'** or **'Add Qualification'** and choose from the list of criteria that you will have previously setup under **Admin->Company->HR/Qualifications**
  ◆ click on the green **Save** button
  ◆ repeat the above process for any list values that will activate other criteria
➔ When complete, go back to the **Details** tab and click on the green **Save** button to save the overall Reference Field

Reference Fields for Closing jobs

In certain cases you may need to collect data when the job is being Closed as opposed to when it is created. You can create any of the above the Reference Field options for Job Closing by following the steps as outlined and also enabling the **Collect at Closing** checkbox when editing the Reference Field. Such reference fields will only appear when a job is being Closed and not when a job is being created.



Also, when you enable a Reference field for **Collect at Closing**, a new **Services** tab will also appear. By selecting this tab you can enable this Reference field for all Services (default) or you can select the services for which this may apply, for e.g. you may wish to collect this information only for OPI On Demand Jobs.
To do this simply uncheck the **Enable All Services** option and select the Service in the Service box below - hold down the Ctrl key on your keyboard to select multiple.
Return to the **Details** tab and click on the green **Save** button.



Customer Reference Fields

All of the above Reference Field options can also be created at a **Customer** level and these Reference Fields would only appear on jobs created for that specific customer.

To access Customer Configuration, click on the **Admin** menu and select **Customers**.

Search for and select the appropriate Customer on the left hand side and then scroll down to the **Reference Field Configuration** section for that Customer.
Click **Add Reference** and follow the instructions in the above sections to create a Reference Field according to the Customer requirements.

For more advanced Reference Field options or if you need any help with the above, please contact us at support@interpreterintelligence.com