

Auto Offer

Aside from manually Offering jobs and Bulk Offering jobs to **Interpreters** (as covered in the topics '**Offering & Assigning Jobs**' and '**Bulk Offering Jobs**'), you can also avail of a system setting to **Auto Offer** jobs to **Interpreters** on a scheduled basis.

Auto Offer will offer **Open** jobs to any default eligible **Interpreters** only. In other words, if you go to the **Assignments** page of any job, click on the **Unassigned** link, the **Interpreters** that appear in the **Interpreter List**, without any toggling of **Job Summary** or **Booking filters**, will be automatically offered the job using the **Auto Offer** setting.

Assign Interpreter

Job #2860243 - Current Status: Open

Booking Filters (0 Filters)

Interpreter List Preferred Interpreters Interpreter Calendar Map Offered Audit History Comments

	miles	Ral	Cat	Lang	Name	Number	Region	Active Note	Availability	Experience	Notes	Rate
<input type="checkbox"/>	0.0	1	fte	fra (+2)	Conor Power (● ...)	415-216 6677						
<input type="checkbox"/>	1.7	1	fte	por (+1)	Gregory Hicks (● ...)	(415) 558 - 0448						
<input type="checkbox"/>	2.6	1	con	spa (+1)	Marian Blanco (● ...)	(415) 283-3359	California	Working freelance since 2008. Worked as translator prior.	M-F 9 - 5	Mostly medical	test note	

If you do need to toggle the job or booking filters to view or offer to more **Interpreters**, this will need to be done manually.

Note: for Service locations that use the '**Remote**' flag, i.e. this is not a physical address for Video/Phone Bookings, the **Proximity Search** will automatically be disabled and the same is the case for the **Auto Offer** process.

It is also important to note that, everytime the **Auto Offer** Process runs, it will check previously offered jobs that are still in an **Offered** status for any newly available **Interpreters** and will then also offer the job to those **Interpreters**. Once a job is any other status other than **Open** or **Offered**, for example **Assigned** or **Closed**, it will of course no longer be offered.

Enabling Auto Offer at Company Level

- Navigate to the '**Admin**' menu and select '**Company**'
- Click on the **Configuration** tab and scroll down to the **Configuration: Job Offers** section and check the box **Enable Auto Offering**
- There are a number of other settings that can also be updated according to your preferences:

- ◆ **Include Unavailable Interpreters** - this setting will include Unavailable **Interpreters** for both **Auto Offer** and **Bulk Offers**

- ◆ **Auto Offer Exclude Hours** - this is the number of hours between the **Expected Start time** of the job and the **Auto Offer** process, for example, if this is set to 24 (hours), jobs that are due to start within 24 hours of the next scheduled **Auto Offer** Process will be excluded from **Auto Offer** as they may need to **Offered/Assigned** manually and urgently
 - ◆ **Enable Auto Job Offer Emails** - this is a flag specifically related to Email **Notifications** for **Auto Offer**, some agencies find that their **Interpreters** may be swamped by **Auto Offer** Emails and do not check this box and prefer to direct their **Interpreters** to Accepting jobs via their **Interpreter Portal**
 - ◆ **Enable Daily Job Offer Digest** - this option can be used as an alternative to individual Job Offer Emails (when using **Auto Offer** or not) where **Interpreters** will receive an end of day digest Email which includes all offers received within the 24 hour period
- Finally, scroll back to the top of the **Configuration** tab under **Configuration: Interpreter Self Assignment:**
- ◆ **# Days for Self Assignment** - this will set the period into the future from now to the **Expected Start Date** of the job where auto offers will be sent, for example, if this is set to 7 days, only jobs that have an **Expected Start Date** of 7 days from now will be included in the **Auto Offer** - such jobs are automatically and subsequently auto offered when they are within 7 days into the future
 - ◆ **Radius for Self Assignment** - this sets the Radius from the **Interpreter's** Home address to the **Service Location** on the job whereby auto offers will be sent, for example, if this is set to 50, **Interpreters** will receive auto offers for all jobs that are within 50 (miles/Km as per Company settings) of their Home address
- Finally, click the Blue **Save** button on the left hand side.

Enabling Auto Offer at Customer Level

Once you have enabled Auto Offer at the **Company** level you must then enable at the individual **Customer** level, this provides the flexibility to enable for certain customers and not for others, for example, Auto Offer may suit larger customers but smaller customers may prefer manual offering.

- Navigate to the '**Admin**' menu and select '**Customers**'
- Search and select the relevant **Customer** from the list on the left hand side

The screenshot displays the 'Customers' configuration page for 'Aberfeldy Surgery'. On the left, a search bar labeled 'Search customers' is circled in red, with a dropdown list showing search results. The main configuration area includes a 'General Configuration' section with the following fields and options:

- Time Zone: [?] (with a help icon)
- [Select a Timezone/Override Company Timezone]
- Radius for Automated Assignment: [?] (with a help icon)
- Enable Sublocations?: [?]
- Enable VoS Required?: [?]
- Enable eSignature Required?: [?]

- Scroll down to the **Customer Portal** section and check the box '**Enable Auto Offering**'
- Finally, click the Blue **Save Changes** button on the top left hand side.
- Repeat the above process for any other **Customers** where **Auto Offer** is required.

Other Auto Offer Exclusions

Aside from Excluding (not enabling) **Auto Offer** for certain customers, there are other ways that you can modify auto offer options.

Exclude from Auto Offer on Contact Profile

You can exclude individual **Interpreters** from **Auto Offer** at the **Contact** level:

- Navigate to the **'Manage'** menu and select **'Manage Contacts'**
- Search for the relevant **Contact** from the list and, using the dropdown arrow, select **Edit (in full)**
- Under the **Miscellaneous** section you can check the box **Exclude from Auto Job Offer**
- Alternatively, you can also disable **Auto Offer** emails at the **Contact** level by checking the box **Disable Auto Job Offer Emails**
- Finally, click the Blue **Save** button on the left hand side.

The screenshot shows the 'Manage Contacts' form for Mark Gonzalez. The 'Miscellaneous' section contains several checkboxes, with two circled in red: 'Disable Auto Job Offer Emails?' and 'Exclude from Auto Job Offer?'. Other visible options include 'Transport?', 'Children?', 'Status: Active', 'Region', 'Business Unit', 'Residence', 'Origin', 'Nationality', 'Ethnicity', 'Company', 'Website', 'Disable Confirm Booking Reminders?', 'Disable Upcoming Booking Reminders?', 'Disable Close Booking Reminders', and 'Disable Confirmation Emails?'. A 'Languages' section is also visible at the bottom.

Exclude from Auto Offer on Booking

You can also exclude individual jobs from **Auto Offer**:

When creating a new **Job/Booking** simply check the box **Exclude from Auto Offer** in the **Customer Information** section.

The screenshot shows the 'Booking # - Customer Information' form. The 'Exclude from Auto Offer' checkbox is checked and circled in red. Other visible options include 'Exclude from Job Offer Pool', 'Notification Email Enabled', 'Client', 'Requested By', 'Customer', 'Bill To', and 'Customer Notes'. The status is 'NEW'.

If you wish to enable **Auto Offer** for your agency we will be happy to assist you further at support@interpreterintelligence.com