

Services Configuration

Services define the Billable and Payable items that will appear on an Invoice or Payment issued from Interpreter Intelligence - these include standard items such as **Interpretation**, which is the cost of the Interpretation on the **Job** based on the **Duration**, as well as **Incidentals/Expenses** that may be added to the job.

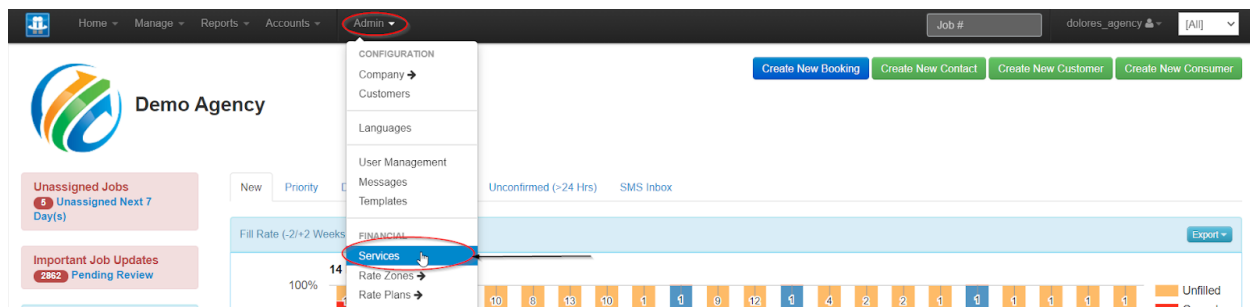
You may also need to use the Services Configuration to integrate with 3rd Party Accounting Packages such as QuickBooks (see separate topics under QuickBooks Integration info).

Services are firstly configured at an overall Company level and can then be further refined, if required, at a Rate Plan level.

Company Level Services Configuration

To access **Company Services** Configuration:

→ Navigate to the '**Admin**' menu and select '**Services**'



- A number of **Services** will already have been added for you according to your Agency preferences.
- For example, **Interpretation** is the default line item on an **Invoice/Payment** which is the cost of the **Duration** of the **Job** as defined on the **Rate Plan**. **Cancel Fee, Rush Fee & Misc. Fee** may also be automatically applied to an **Invoice/Payment** if the fee conditions as defined on the **Rate Plan** are met. If **Mileage** is Financed Automatically on a **Rate Plan**, it would also be applied automatically to an **Invoice/Payment**.
- All **Service Types** can also be added as **Incidentals** during the **Job Close** process for example. These can be added by your Agency or by Customers and/or Interpreters where permissions have been granted and according to how they are configured (see below).

Details

Arrival Date / Time: 10/08/20 10:00 AM

Start Date / Time: 10/08/20 10:00 AM

End Date / Time: 10/08/20 11:30 AM

Number Consumers: [# Consumers]

Job Close Notes

Additional References

Did the interpreting session actually take place? [Choose a value]

Incidentals (Get Mileage)

[Choose a Type]

- Mileage
- Travel (Misc)
- Taxi
- Hotel
- Food & Drink
- Miscellaneous
- Interpretation
- Translation
- Cancel Fee
- Parking
- Tolls
- Tax
- Credit
- Deduction
- Misc. Fee
- Misc. (Hours)
- Travel Time (Hours)
- Deduction (Hours)

Description as defined in Services

I Need Help! Next Cancel

Adding Services to your Company Configuration

- To see a full list of **Services** available on the system you can click on the dropdown menu at the top of the **Type** column
- If there are **Services** listed here that are not added to your Configuration and are required:
- Click on the **Add Configuration** button
- In the blank row (second row), use the dropdown menu to select the **Service Type**

Home - Manage - Reports - Accounts - Admin - Job # dolores_agency [All]

Services Configuration

Add Configuration

Type	Fixed Description	Description	Rate Plan	Enabled	Billable	Payable	Taxable	Tax Name	Tax Rate	Modified By	Modified	Cap	Receivable code	Payable code	AR Tax	AP Tax
Interpretation	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	VAT	0.200000	elena_agency	08/27/19 11:23 AM		Interpretation	Interpretation		
Rush Fee	<input type="checkbox"/>			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>			greg_agency	04/12/19 9:46 AM					
Cancel Fee	<input type="checkbox"/>			<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>			elena_agency	07/05/17 2:09 PM		Interpretation	Interpretation		
Mileage	<input type="checkbox"/>			<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	tax	0.100000	agency.admin@interpreterintelligence.com	12/06/18 3:31 PM		Interpretation	Interpretation		
Travel (Misc)	<input type="checkbox"/>			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>			support@interpreterintelligence.com	10/24/18 10:04 PM					
Taxi	<input type="checkbox"/>			<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>			elena_agency	04/02/20 3:14 PM		Interpretation	Interpretation		
Hotel	<input type="checkbox"/>			<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Hotel Tax	0.090000	agency.admin@interpreterintelligence.com	12/06/18 3:31 PM		Interpretation	Interpretation		

- You will then need to populate some additional fields to complete the addition:
 - ◆ **Description** - this is the description that will be presented to the user when adding Incidentals during the **Job Close** process
 - ◆ **Fixed Description** - ticking this box will ensure that the **Description** cannot be overwritten by the user. If this is not enabled the user will be able to overwrite the description and add their own
 - ◆ **Rate PLaN** - if a **Service/Incidental** is applied at the **Rate PLaN** level (see below), the **Rate PLaN** name will be listed in this field, otherwise this field cannot be modified
 - ◆ **Enabled** - this indicates whether the **Service** is currently in use and who can use it. If a **Service** was previously used but is no longer, you can disable it by unticking this box. If the **Service** is not **Enabled** it will still appear as an

Incidental that can be added to a **Job** for **Internal** users only but will not appear for **Customers** or **Interpreters** therefore this is also a useful feature for controlling what **Incidentals** can be added by **Customers** and **Interpreters**.

- ◆ **Billable** - can the **Service** be added to an **Invoice**
- ◆ **Payable** - can the **Service** be added to an **Payment**
- ◆ **Taxable** - if the **Service** is to be automatically taxed on **Invoices/Payments**.
Note: if there are different **Tax** rates for **Invoices and Payments** you can add two **Tax** items, one which is **Billable** with the appropriate **Rate**, and one which is **Payable** with the appropriate **Rate**
- ◆ **Tax Name** - provide a description for the Tax if desired, especially useful if you have different types of Tax in place
- ◆ **Tax Rate** - provide the tax rate for the purposes of calculation
- ◆ **Modified By** - this will be stamped by the system according to who last edited the **Service**
- ◆ **Modified** - this will be date/time stamped by the system according to when the **Service** was last edited
- ◆ **Cap** - you can add a cap to the **Service** which will determine the maximum that will be **Invoiced/Paid** according to the Unit of the **Service Type**, for example, 8 on the **Interpretation Type** would indicate a **Cap** of 8 hours of **Interpretation Service** charges
- ◆ **Receivable code** - this field will be used for 3rd Party Accounting System Integration, for example, for QuickBooks Online, this would be the Product/Service Item for Invoices
- ◆ **Payable code** - this field will be used for 3rd Party Accounting System Integration, for example, for QuickBooks Online this would be the Product/Service Item for Payments
- ◆ **AR Tax** - this field will also be used for 3rd Party Accounting System Integration to map to an Accounts Receivable Tax Code
- ◆ **AP Tax** - this field will also be used for 3rd Party Accounting System Integration to map to an Accounts Payable Tax Code
- ◆ **Ac.CL.** - Accounts Classification; also used for 3rd Party Accounting System Integration to map to Classes for example in QuickBooks Online. Note that as you will already map to 3rd party Receivables & Payables at this level, the **Accounts Classification** or Class Mapping will likely be more useful/granular at the **Rate Plan** level where you can use the **Accounts Classification** at **Base Tier, Service Tier, Qualifications Tier** and **Language Tier** levels, as well as **Rate Plan** level **Incidentals** (see below)
- ◆ **Save** - Press the save icon when you add or modify any Services
- ◆ **Remove** - use this to remove Service items, see below for further details

→ Important Note: you cannot add multiples of any one **Service Type** at the **Company** Level. However, if you do Override **Services** at the **Rate Plan** level (see below), you will see multiples of any one **Service Type**. As per above, if a **Service/Incidental** is applied at the **Rate Plan** level, the **Rate Plan** name will be listed in the **Rate Plan** column.

Removing Services from your Company Configuration

To Remove a **Service** at **Company** level:

- Click on the **x** (delete) icon on the right hand side of the **Service** item - only use this option if the **Service** has not and will not be used by your agency, alternatively
- Uncheck the **Enabled** box to disable the **Service** item - use this option if the **Service** item has been used in the past but is no longer required

In both of the above cases, once a **Service** item has been removed, it will no longer appear in the dropdown box when adding Incidentals to a **Job**

pe	Fixed Description	Description	Rate Plan	Enabled	Billable	Payable	Taxable	Tax Name	Tax Rate	Modified By	Modified	Cap	Receivable code	Payable code	AR Tax	AP Tax	Ac.CL
				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	VAT	0.200000	eiena_agency	08/27/19 11:23 AM		Interpretation	Interpretation			
				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>			greg_agency	04/12/19 9:46 AM						

Rate Plan Level Services Configuration

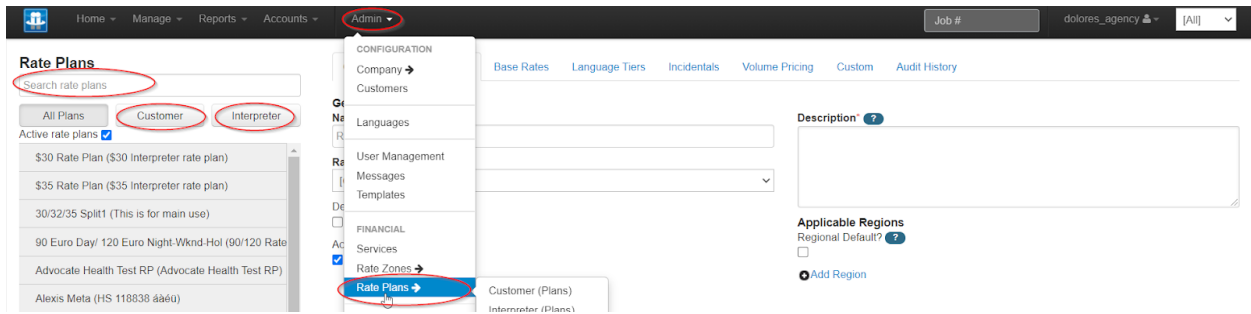
If you require more specific or different values for **Services** for specific **Customers** and/or **Contacts/Interpreters**, you can add these at the **Rate Plan** level. **Incidentals/Services** added at the **Rate Plan** level will override those at a **Company** level.

For example, you may have a different tax rate on **Interpretation** for a specific **Customer**, or, you may want to allow **Mileage** for one or a select number of **Customers** and/or **Contacts** rather than all of them.

If you do Override **Services** at the **Rate Plan** level these will also be listed under **Company** > **Services** therefore you may then see multiples of a **Service Type**. If a **Service/Incidental** is applied at the **Rate Plan** level, the **Rate Plan** name will be listed in the **Rate Plan** column thereby distinguishing it from **Company** level **Services**.

To access **Rate Plan Services/Incidentals**:

- Navigate to the '**Admin**' menu and select '**Rate Plans**'
- You can filter for **Customer** or **Interpreter Rate Plans** using the buttons provided and/or search for the **Rate Plan** by typing some/all of the **Rate Plan** name in the **Search** box



- Select the appropriate **Rate Plan**
- Click on the **Incidentals** tab
- You can then explicitly configure the **Incidentals** for this **Rate Plan** by following the instructions as per above (Adding Services to your Company Configuration)
- You will only need to add any **Incidentals/Services** that will be different from the **Company** level configuration; any **Incidental** not configured here will be picked up from the company wide configuration