

Business Units

For large Agencies, Business Units are a useful way to categorise Customers and Interpreters and therefore Manage your scheduling in smaller units.

Setting up Business Units

Go to the 'Admin' menu and select 'Company' and select the **Business Units** tab

- Click on **Add Business Unit**
- **Name** - you must provide a **Name** for this **Business Unit** and a **Description** at minimum
- **Description** - you must provide a **Name** for this **Business Unit** and a **Description** at minimum
- **Contact Number** - you can add a specific Contact Phone Number for this **Business Unit**
- **Contact Email** - you can add a specific Email address for this **Business Unit**
- **Notification Email** - this will allow you to add a specific 'From' email address for this **Business Unit**, this would override the Company 'From' email address - this email address must complete a verification process, please contact II if you wish to use this
- **Splash Message** - this will allow you to add a specific Splash message for Customer & Interpreter portals for this **Business Unit**, this would override the Company Splash message if used
- **Notification number** - this will allow you to add a specific 'From' sms number (if using sms) for this **Business Unit**, this would override the Company 'From' sms number - this email address must complete a verification process, please contact II if you wish to use this
- **Enabled** - to enable this **Business Unit** click on the this flag, if in the future you are no longer using this **Business Unit**, you can uncheck this box to disable it
- Click on the **Save** link
- Click on **Add Business Unit** again to add additional **Business Units** and make sure to **Save** each one

The screenshot shows the 'Business Units' configuration page. The form includes the following fields and controls:

- Name:** North Region
- Description:** All Business in the northern Region
- Contact Number:** (empty)
- Contact Email:** (empty)
- Notification Email:** (empty)
- Splash Message:** (empty)
- Notification Number:** (empty)
- Enabled:**
- Save:** (button, highlighted with a red circle and an arrow)
- Delete:** (button)
- Add Business Unit:** (button, highlighted with a red circle)

Managing Business Units

Once you have setup your **Business Units** as required you can then begin to associate **Customers** and **Contacts/Interpreters** to the relevant **Business Units** in order to segregate your activities/operations into the relevant **Business Units**.

Assigning Customers to Business Units

- Go to the **'Manage'** menu and select **'Manage Customers'**
- Use the **Edit** action on the dropdown menu next to the relevant **Customer**
- In the **Classifications** section use the **Business Unit** drop down menu to select the relevant BU - note that only Business Units that have already been setup, as per the Setting up Business Units section, will appear for selection
- Similarly, when creating new **Customers** simply use this menu when creating the **Customer** profile
- Use the blue **Save** button to save these changes

The screenshot shows a form titled "Classifications" with three dropdown menus. The first dropdown is labeled "Contract Type * ?" and has "Contract" selected. The second dropdown is labeled "Status * ?" and has "Active" selected. The third dropdown is labeled "Business Unit ?" and has a list of options: "[Choose a Unit]", "[Choose a Unit]", and "North Region". The "North Region" option is highlighted in blue.

Assigning Contacts/Interpreters to Business Units

- Go to the **'Manage'** menu and select **'Manage Contacts'**
- Use the **Edit** action on the dropdown menu next to the relevant **Contact**
- In the **Classifications** section use the **Business Unit** drop down menu to select the relevant BU - note that only Business Units that have already been setup, as per the Setting up Business Units section, will appear for selection
- Similarly, when creating new **Contacts** simply use this menu when creating the **Customer** profile
- Use the blue **Save** button to save these changes

Classifications

Gender * ? D.O.B.

Business Unit ?

Miscellaneous

Transport? ? Children? ? Status: Active Region ?

Residence ? Origin ? Nationality ?

Ethnicity ?

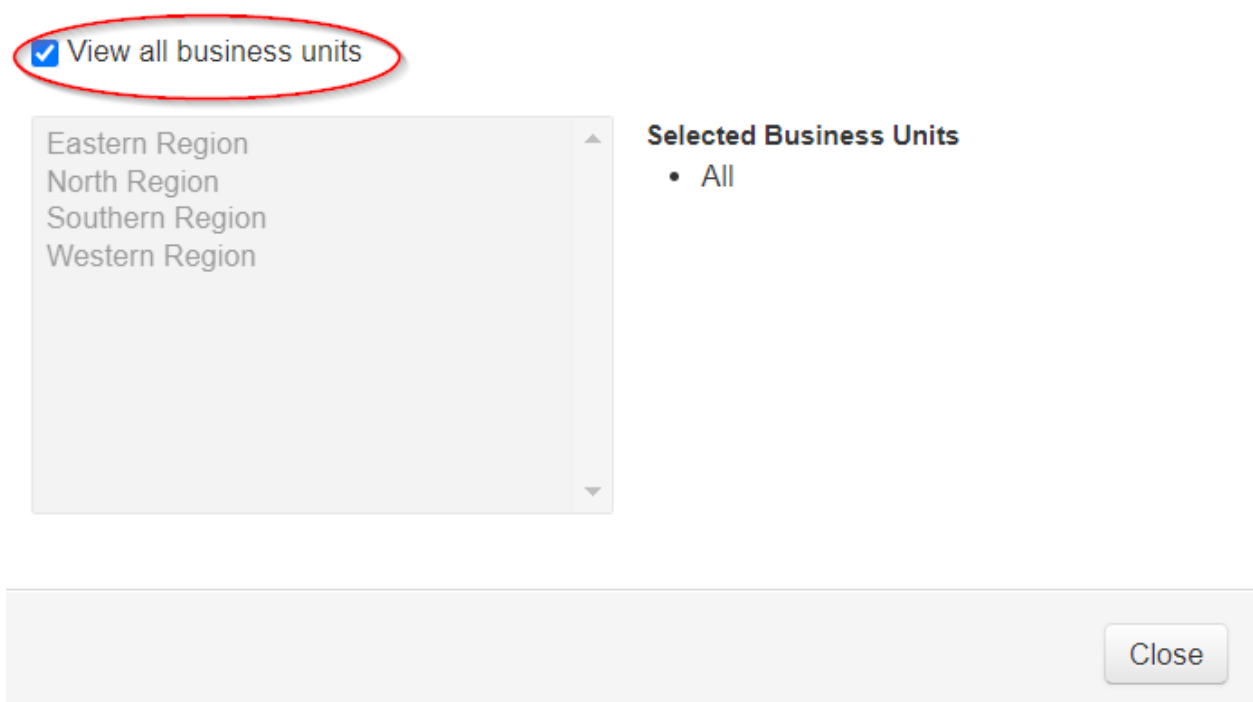
Operating within Business Units

To Manage **Business Units** internally, you can use the **Business Unit** filter button on the right hand side of the black menu bar within any page in II.



Clicking this filter icon will then allow you to select one or a number of **Business Units**. If you have not previously used this filter, the filter window will show all **Business Units** are selected.

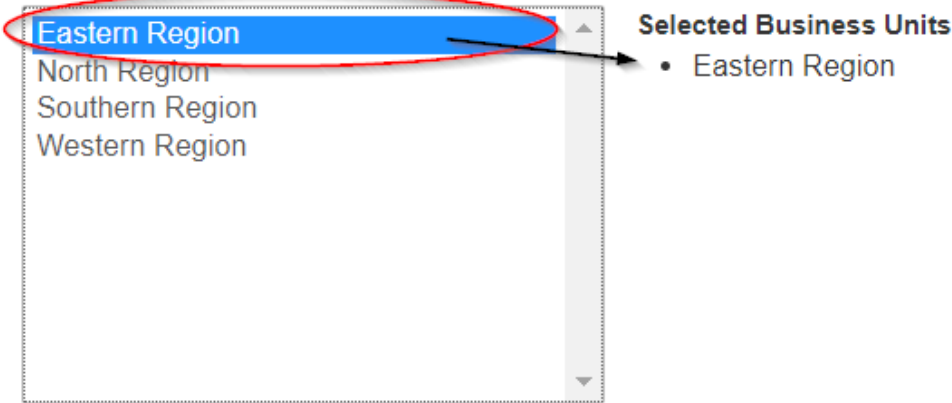
Select Business Units



To filter by an individual **Business Unit**, uncheck the **View all business units** flag and select an individual **Business Unit** from the list in the box on the left hand side; your selection will then be listed under **Selected Business Units** on the right hand side.

Select Business Units

View all business units



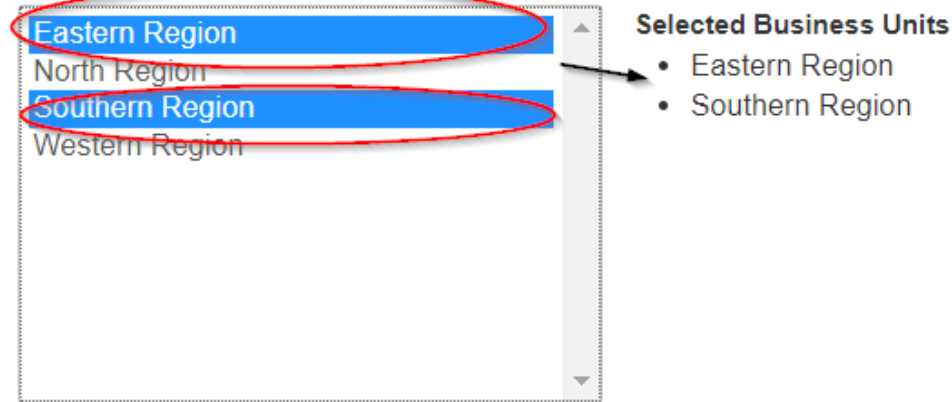
The screenshot shows a dialog box titled "Select Business Units". On the left, there is a list of business units: "Eastern Region", "North Region", "Southern Region", and "Western Region". The "Eastern Region" is highlighted in blue and circled in red. An arrow points from this selection to the "Selected Business Units" section on the right, which contains a bulleted list with "Eastern Region".

Close

To filter by multiple **Business Units** simultaneously, select the first **Business Unit** from the list in the box on the left hand side and, holding the **Ctrl** key on your keyboard, select any other **Business Units** as required; your selection will then be listed under **Selected Business Units** on the right hand side.

Select Business Units

View all business units



The screenshot shows the same "Select Business Units" dialog box. In this instance, both "Eastern Region" and "Southern Region" are highlighted in blue and circled in red. An arrow points from these two selections to the "Selected Business Units" section on the right, which contains a bulleted list with "Eastern Region" and "Southern Region".

Close

When a **Business Unit** filter has been applied, note how the **Business Unit** filter button on the black menu bar will appear in Red to indicate this.

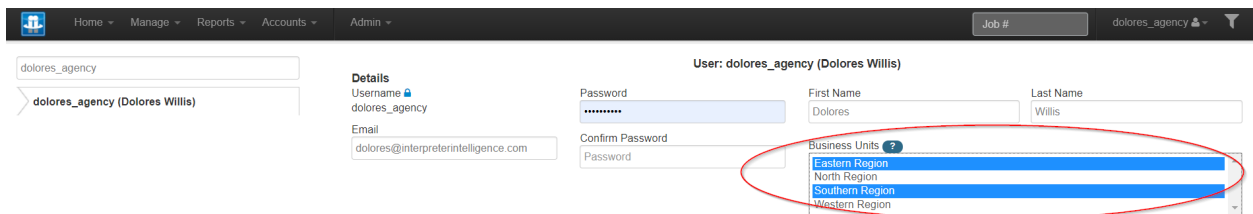


Applying the **Business Unit(s)** filter will refine all activities within your selected page/view to business related only to this **Business Unit**. For example, when Creating a **New Booking/Job**, you will only be able to select **Customers** within the filtered **Business Unit**. Similarly on the **Manage Jobs** page, **Financial Review**, **Receivables** etc. you will only see transactions related to this **Business Unit**, i.e. activities related to **Customers** assigned to the filtered **Business Unit**.

User Management and Business Units

If you wish to actually restrict **Internal** Users to a specific **Business Unit**, in other words they will only be able to carry out activities related to a specific **Business Unit** and will not be able to change their **Business Unit** filter, you can do this by assigning a **Business Unit(s)** to their associated **User Account**. Note that any user who has **Admin** privileges will always be able to work with all **Business Units**, assigning a **Business Unit** in **User Management** will not change this.

- Go to the '**Admin**' menu and select '**User Management**'
- Search and select the relevant **User Account** on the left hand side
- Click the **Business Unit** that you wish to assign/restrict this user to; to add multiple **Business Units** to this user, select the first **Business Unit** from the list in the box and, holding the **Ctrl** key on your keyboard, select any other **Business Units** as required
- Use the blue **Save** button to save any changes
- To remove a **Business Unit(s)** from a User you can use the reverse action; holding the **Ctrl** key on your keyboard, click to deselect any **Business Units** as required and again use the blue **Save** button to save any changes



You can also repeat the above process for **Requestor** and **Interpreter** User Accounts, however, as **Requestors** will usually be associated with a specific **Customer(s)** and **Interpreters** will only see **Jobs** that they have been **Offered** or **Assigned**, this step is not necessary for those types of Accounts.