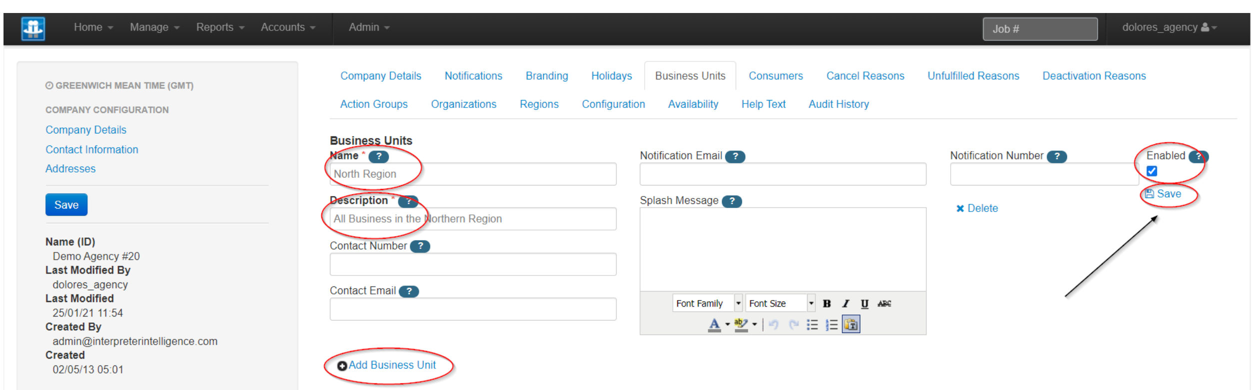
Business Units

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



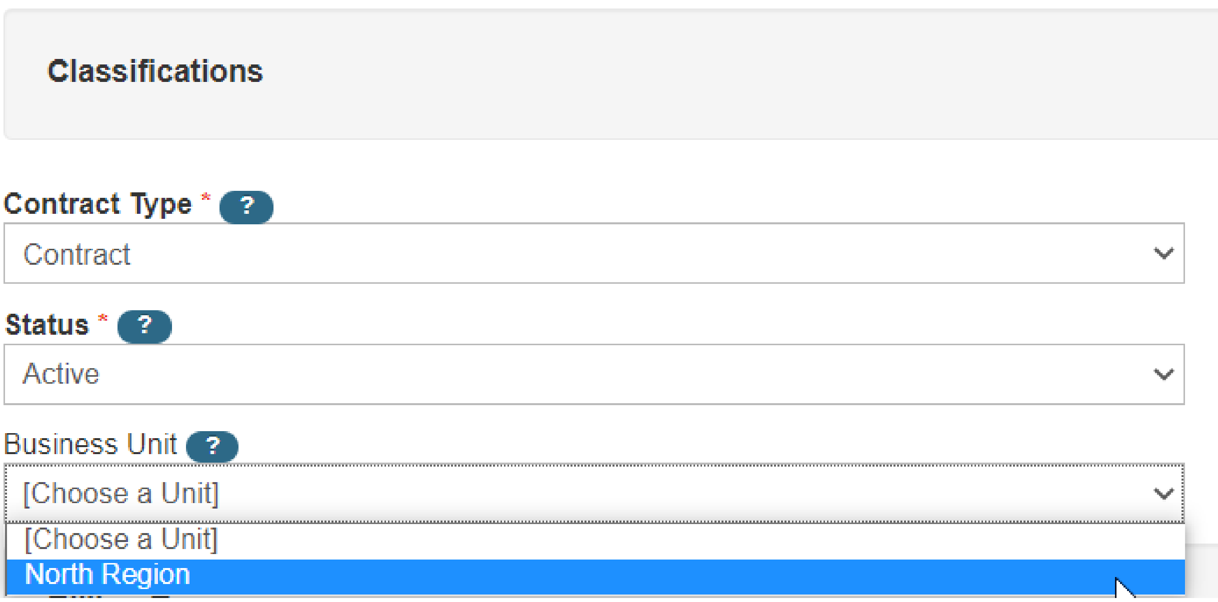
v.3.86 06/21

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.**

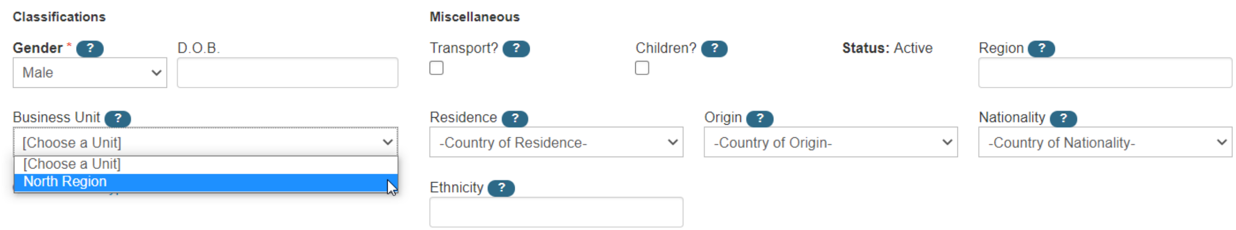
Assigning Customers to Business Units

- 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



Assigning Contacts/Interpreters to Business Units

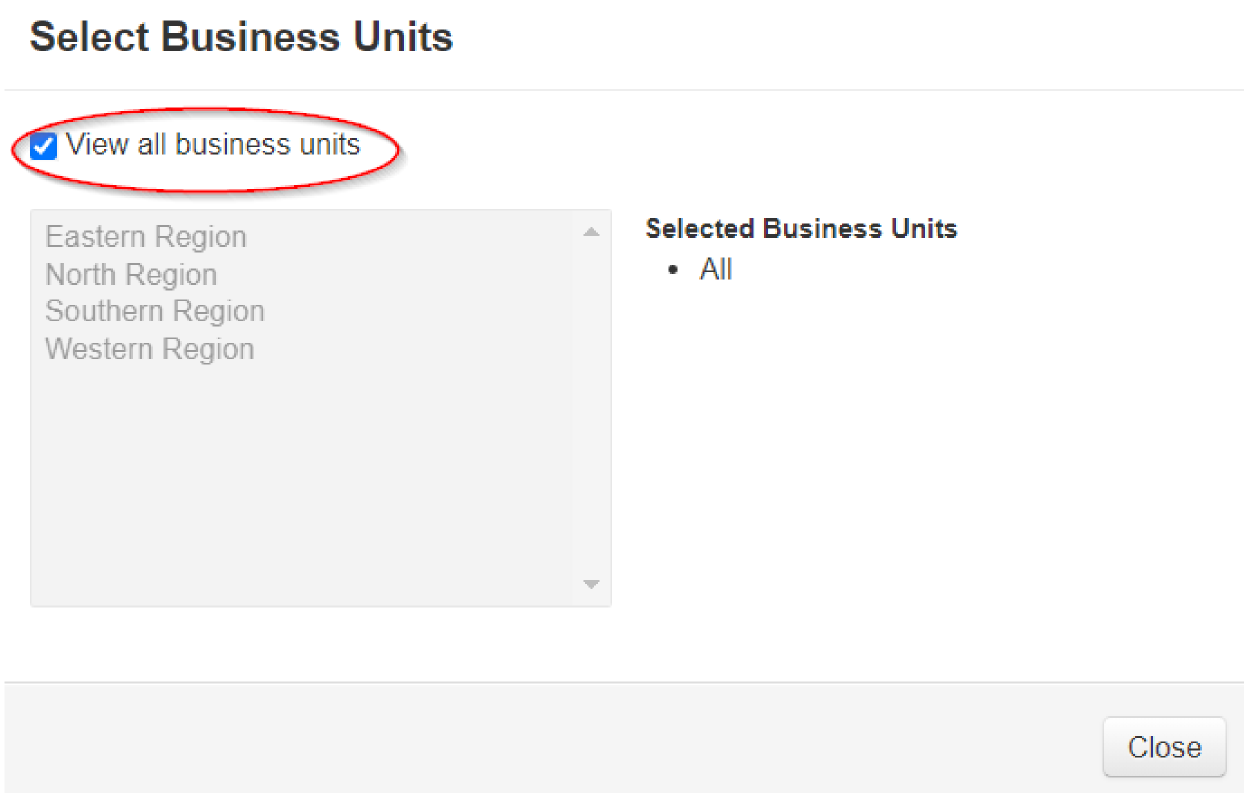
- Go to the **'Manage'** menu and select **'Manage Contacts'**
- Use the **Edit** action on the dropdown menu next to the relevant **Contact**
- In the **Classifications** section use the **Business Unit** drop down menu to select the relevant BU - note that only Business Units that have already been 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



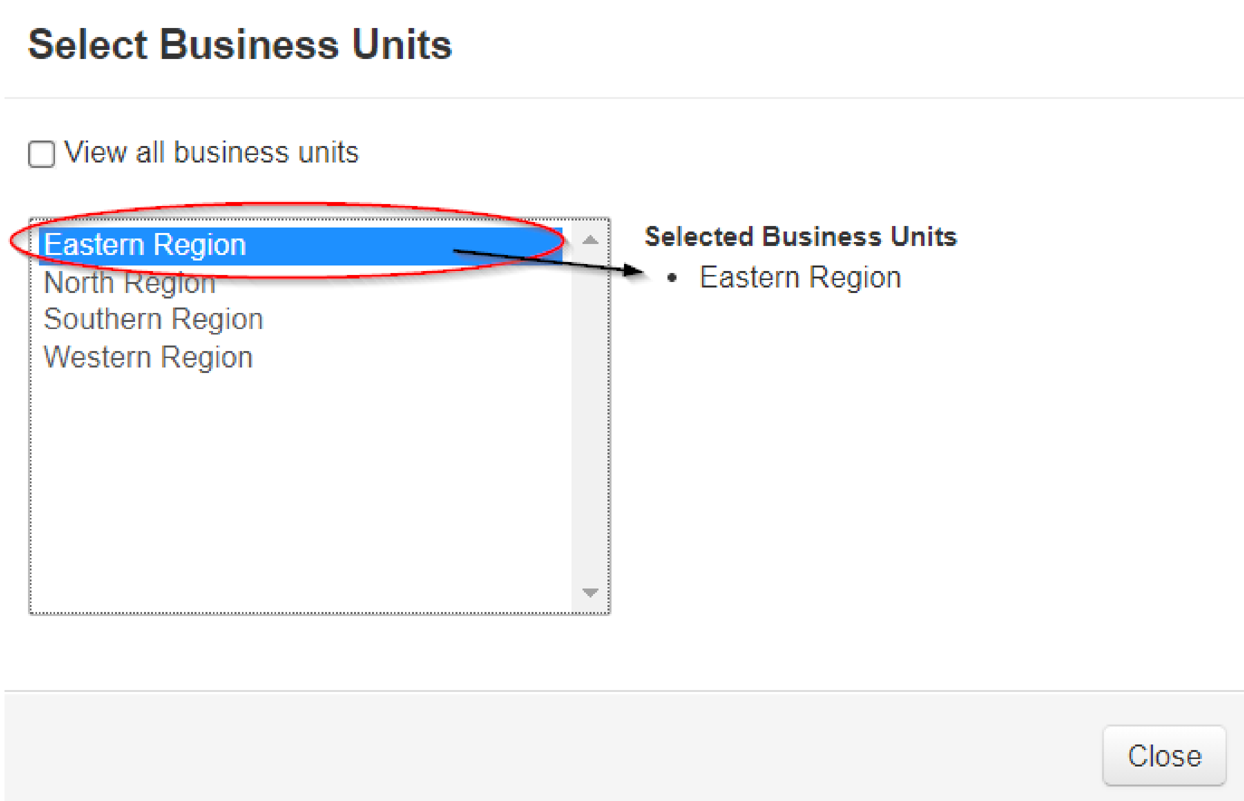
Operating within Business Units

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.

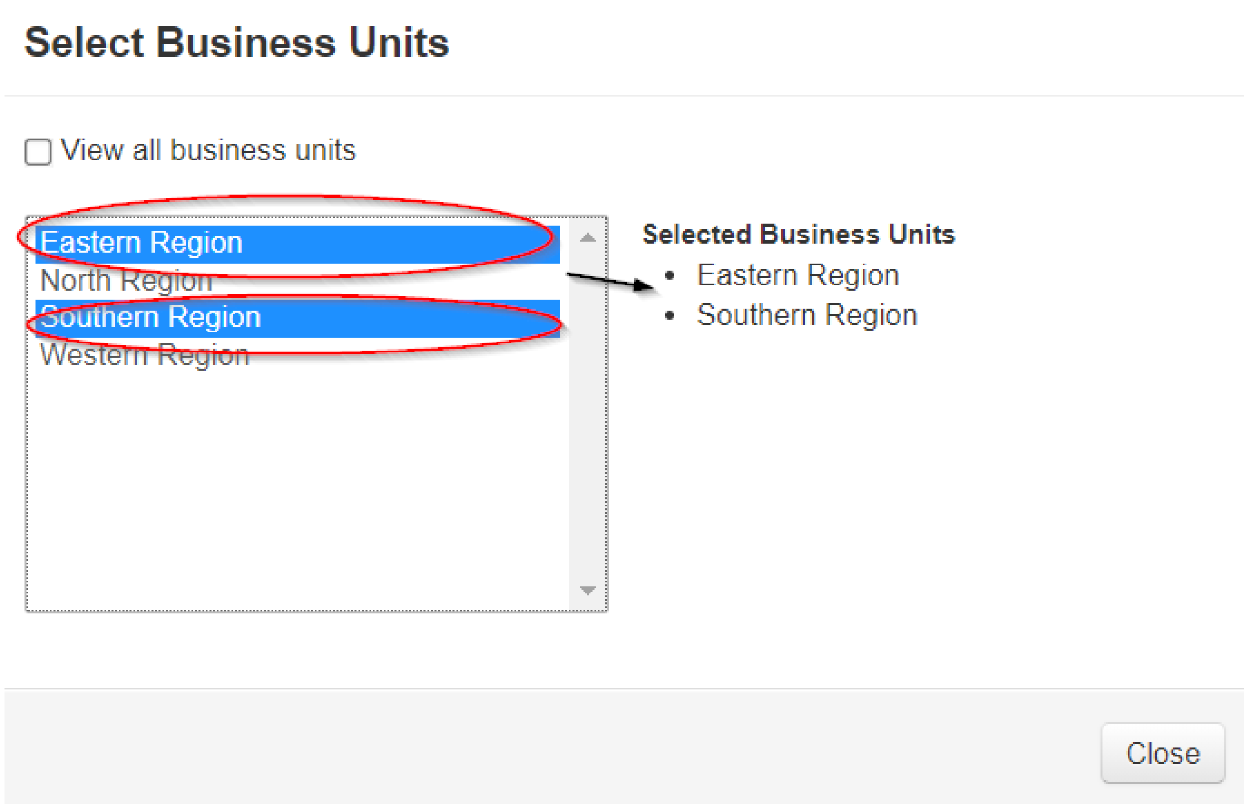
Clicking this filter icon will then allow you to select one or a number of **Business Units.** If you have not previously used this filter, the filter window will show all **Business Units** are selected.



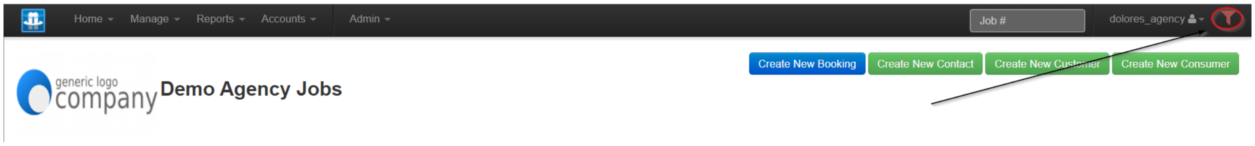
To filter by an individual **Business Unit**, uncheck the **View all business units** flag and select an individual **Business Unit** from the list in the box on the left hand side; your selection will then be listed under **Selected Business Units** on the right hand side.



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.



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.

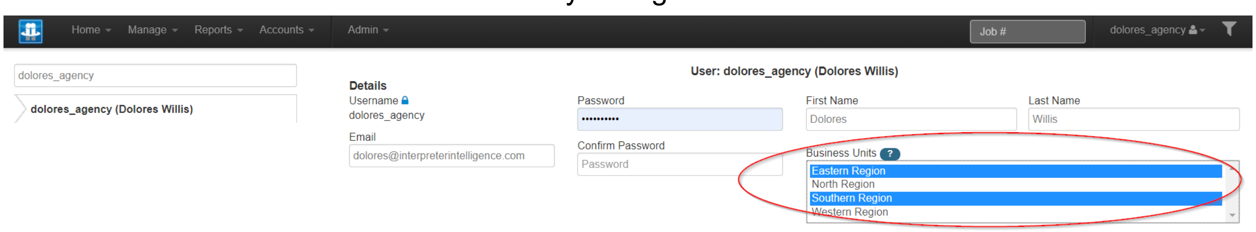


Applying the **Business Unit(s)** filter will refine all activities within your selected page/view to business related only to this **Business Unit**. For example, when Creating a **New Booking/Job**, you will only be able to select **Customers** within the filtered **Business Unit**. Similarly on the **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.