

Rate Zones

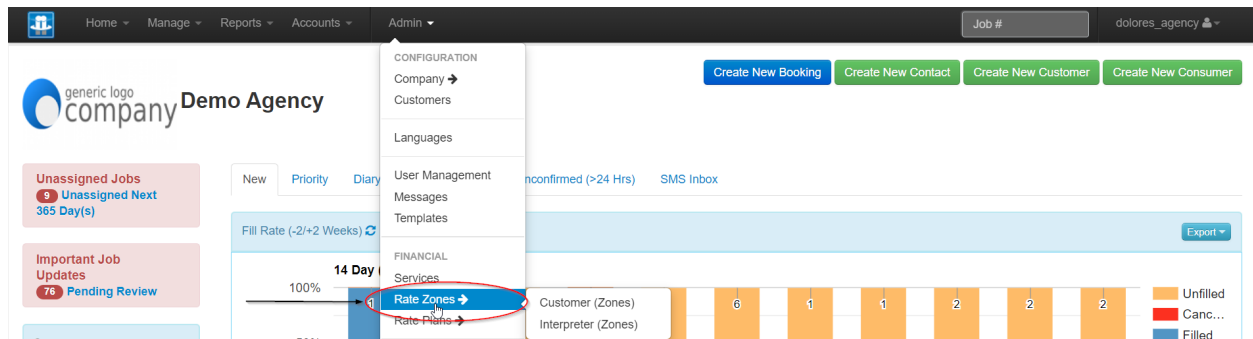
To begin setting up your Interpreter Intelligence system to automatically calculate Invoice and Payment line items, the first thing you need to do is setup **Rate Zones**.

Rate Zones are used to categorise different hours of the day or the week into different chargeable and payable zones. For example, you may have one zone for your normal office hours such as Monday to Friday, 9am to 5pm, another for out of hours Monday to Friday and Saturdays and another for Sundays and Holidays. It has 3 separate rate zones to help you define these chargeable times; **Standard**, **Premium** & **Platinum**. When we move to setting up **Rate Plans** you will see how you can then apply different rates to the different **Rate Zones**.

Creating Rate Zones

To setup a Rate Zone:

→ Navigate to the '**Admin**' menu and select '**Rate Zones**'



- Click the button **New Rate Zone**
- Enter a **Name** for the rate zone
- Check the box **Default Group** (see below for further information)
- Provide a **Description** for the rate zone which will remind you, the agency, what this particular zone applies to
- You can then see that the **Rate Zone** has 3 main sections as outlined above - **Standard**, **Premium** and **Platinum** and you can use each of these sections to categorise your chargeable and payable hours
- Starting with the **Standard** Section:
 - ◆ Click **Add Segment**
 - ◆ Simply select the **Day** of the week, e.g. Monday, and the **Start Time** and **End Time** e.g. 09:00 to 17:00. Alternatively you can select **All Day** if you do not have any distinction between weekday hours
 - ◆ Click **Add Segment** again and repeat this process to select all appropriate days of the week and hours for your **Standard** hours

- Let's move onto the **Premium** Section - note that by default, all hours outside of **Standard** hours will be charged at **Premium** rates, however, you do need to add at least one segment to activate this section
 - ◆ Click **Add Segment**
 - ◆ Simply select the **Day** of the week, e.g. Saturday, and in this case you would likely select **All Day**
 - ◆ Repeat this process for any other days/hours that fall into the Premium section. Note that you do not need to define out-of-hours from Monday to Friday as these will automatically be charged at Premium rates
- Finally, you may wish to define the **Platinum** section for any other hours, e.g. Sundays or Holidays:
 - ◆ If this section covers holidays simply check the box **Include Holidays** (see below for more information on setting up holiday dates)
 - ◆ If this section covers any other days of the week simply click **Add Segment** as per above
- When you have completed all sections, click **Save Rate Zones**
- If you wish to setup additional rate zones for specific **Customers** or **Contacts**, click the **New Rate Zones** button or **Duplicate Rate Zones** if the rate zone will be similar with some modifications. Any additional rate zones **should not** be marked **Default**.
- All saved **Rate Zones** will then appear in a list on the left hand side and can be modified at any time
- On the **Audit History** tab of a **Rate Zone** you can see a timeline of changes made
- Note that a **Default Rate Zone** will appear with a ✓ check mark beside it

Default Rate Zones

If a **Customer** or **Contact** does not have a Rate Zone Association they will automatically pick up the Rate Zone that has been marked as **Default** as per the instructions above in **Creating a Rate Zone**.

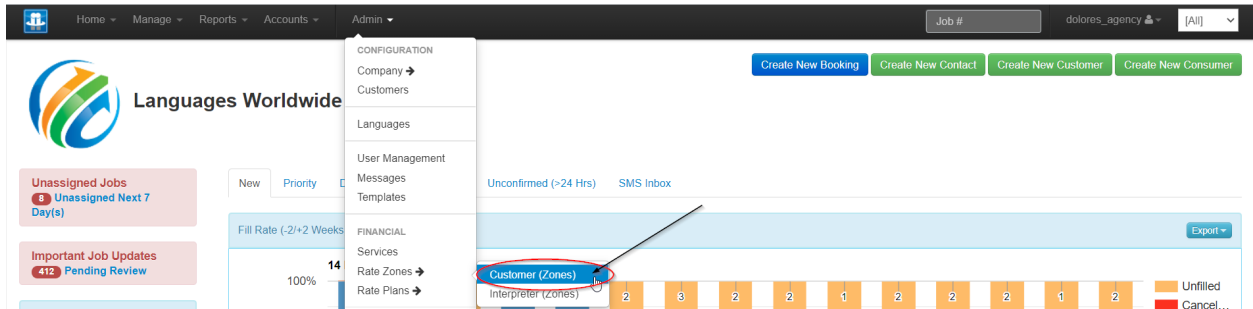
Unlike **Rate Plans** (which will be covered in another topic), **Rate Zones** are not defined at the **Customer** or **Interpreter** level but can be associated with Customers and Interpreters as required, see the section **Associating Rate Zones with Customers/Interpreters**.

Associating Rate Zones with Customers/Interpreters

As per above, If a **Customer** or **Contact** does not have a Rate Zone Association they will automatically pick up the Rate Zone that has been marked as **Default**, therefore your **Default Rate Zone** should cover the hours/zones that are common to the majority of your Customers and Interpreters and you will then only need to associate a small number of outliers to specific **Rate Zones**.

To Associate a Customer with a Rate Zone:

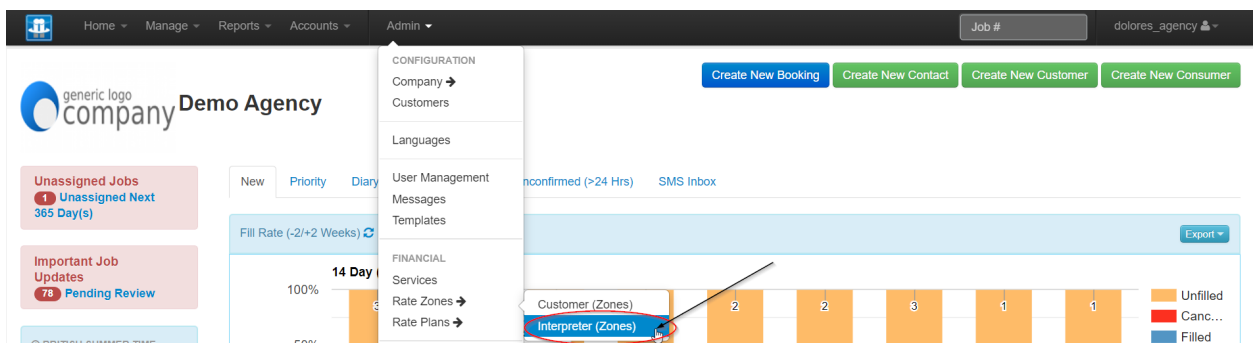
- Navigate to the 'Admin' menu hover over 'Rate Zones' and select the sidebar menu item **Customer (Zones)**



- On the right hand side you will see a list of **Customers** and on the left hand side a list of **Rate Zones**; if you have an exhaustive list on either side you can type to search for the appropriate value
- Clicking on either a **Customer** or a **Rate Zone** will display the details and the relevant associations in the middle of the page; if you click on a **Customer** for example this will show you the association including if this is the **Default**, if you click on a **Rate Zone** this will display the details of the **Rate Zone** but if it is a **Default Rate Zone** the **Customers** will not be shown
- To make/change an association simply select a **Rate Zone** on the left and drag a **Customer** from the right over to the middle on top of the **Rate Zone** or
- Select a **Customer** on the right and drag a **Rate Zone** from the left over to the middle on top of the Customer

To Associate an Interpreter with a Rate Zone:

- Navigate to the 'Admin' menu hover over 'Rate Zones' and select the sidebar menu item **Interpreter (Zones)**



- On the right hand side you will see a list of **Interpreters** and on the left hand side a list of **Rate Zones**; if you have an exhaustive list on either side you can type to search for the appropriate value
- Clicking on either a **Interpreter** or a **Rate Zone** will display the details and the relevant associations in the middle of the page; if you click on a **Interpreter** for example this will show you the association including if this is the **Default**, if you click on a **Rate Zone** this

will display the details of the **Rate Zone** but if it is a **Default Rate Zone** the **Interpreters** will not be shown

- To make/change an association simply select a **Rate Zone** on the left and drag an **Interpreter** from the right over to the middle on top of the **Rate Zone** or
- Select an **Interpreter** on the right and drag a **Rate Zone** from the left over to the middle on top of the **Interpreter**

Setting up Holidays for 'Include Holidays'

If you use the setting 'Include Holidays' in any of your Rate Zones you will need to setup these holiday dates in the system. To do this:

- Navigate to the '**Admin**' menu, select '**Company**' and select the **Holidays** tab
- Click **Add Holiday**
- Enter a **Name**, **Date** and **Description** for the **Holiday**
- Click the **Save** link
- Click **Add Holiday** again and repeat this process for any additional Holidays
- Finally, click the Blue **Save** button to save all settings

Using Overnight/Night settings on a Rate Zone

A more advanced option on **Rate Zones** is to enable the '**Overnight/Night Enabled**'. By doing this, and by also enabling this setting on a **Rate Plan**, you can then define separate rates for Night and Overnight hours which are defined as follows:

- **Night** - these are the hours after the **End time** defined on the days within the applicable **Zone** (Standard, Premium or Platinum) up until Midnight
- **Overnight** - these are the hours from midnight up to the **Start Time** defined on the days within the applicable **Zone** (Standard, Premium or Platinum) up until Midnight

For example, the day hours within a Zone are defined as 8am to 5pm.

Night hours will be 5.01pm until midnight

Overnight hours will be 12.01am until 7.59am

These settings are not customisable, in other words, **Night** rates will always be defined as end of day zone to midnight and **Overnight** will always be midnight to start of day zone.

Overnight/Night can be defined on each zone within a **Rate Zone**, i.e. Standard, Premium or Platinum, providing that each Zone has a day(s) defined and that those days are different to other Zones and that the '**All Day**' setting has not been used. More information on enabling and defining the Rates for **Overnight/Night** can be found under the **Rate Plan** user guides.