

Customer Portal

The **Interpreter Intelligence Customer Portal** provides an Interface for Agency **Customers/Requestors** to place requests for new **Bookings** online, view the bookings **Calendar**, check **Interpreter Assignments**, view **Invoices, Reports** and **Verification of Service** documents for jobs according to the permissions granted. To setup Customer Portal Access for your Requestors please see the topic 'Creating a Requestor'.

This document can be sent to **Customers/Requestors** as a training resource.

Customer Portal for Requestors

The **URL, username** and **password** to access the Customer Portal will be provided by your agency who also manages your account. You will likely be asked to change your password when you first login to the Customer Portal.

Please note that some options described herein may not be enabled by your agency. Please contact your agency if you have questions about access to any of the features outlined.

Dashboard

When you first login to the Customer Portal you will automatically land on the **Dashboard**. This can also be accessed at any time by selecting the '**Home**' menu and clicking on '**Dashboard**'.

Most of the functions that you will need are available directly from the **Dashboard**:

- Get a bird's eye view of the **Bookings/Jobs Calendar** for your company for a month, week, or day at a time. **Bookings** are color-coded by **Status**, the color legend can be found at the top left of the calendar. You can use the arrow toggles ► to jump backwards or forwards on the Calendar or you can use the **Calendar icon** to select a specific date.
- Depending on your Customer Associations in II, you can use the **Clients & Locations** drop down menus to further refine your view of **Bookings**.
- Hover over any **Bookings** in the Calendar to get a pop-up with more details such as **Created By, Language, Start/End Date/Time** etc.
- Click on any **Booking** to see a menu of actions that can be taken such as **Edit, Close** etc.
- Click on **Daily Bookings Log** to print or save a day's log of bookings for a given date. Use it as a sign-in sheet for interpreters or a reference point for your front desk staff.

Create New Booking

- Click the blue **Create New Booking** button to enter a new Booking request, alternatively access the **'Home'** menu and click on **'Create New'**.
- Any fields marked with a red asterisk * must be populated, you can hover over the question mark icon ? at any time to get help text on the appropriate field
- Start with the Client at the top, fill in the value and hit Tab to move to the next field.

● Requestor Information

- The **Customer** and **Bill To** fields will be automatically populated for you
- The **Location** may also be populated for you, otherwise select a **Client** from the drop down list or start typing and select from the lookup
- The **Requested by** and **Notification Email** fields will also be populated based on your (**Requestor**) profile

● Service Location

- The **Location** field may be automatically populated for you, otherwise select a value from the drop down list
- The **Special Instructions** box may have information as added by your Agency and this cannot be modified

● Appointment Details

- Select the required **Language**
- Select the **Service Type** e.g. **Face to Face, Video (Scheduled)** etc.
- Enter the **# Interpreters Requested** (this will default to 1)
- Select the **Consumer** - this is the person receiving the service
- You may need to select **Additional References** and **Additional Requirements** depending on how your Agency has set up the booking form
- You can add notes to the **Appointment Details** box

● Calendar

- Select the **Expected Start Date** using the calendar pop up
- Enter the **Expected Start Time**
- Select the **Duration Hours** and **Minutes**, note that you must select both even if one of the values is zero

● Notes

- You can add any additional notes as required by your Agency in the **Job Details** box
- Finally click the blue **Save** button at the bottom of the page

- Note that any fields that have a **pencil/edit** icon will allow you to either edit an existing record (by selecting it first) or creating a new record, however, it is recommended that you check with your Agency before adding/modifying records.

- And that's it, you're done! The **Booking** will now be available to your Agency for review and **Assignment**

Create Follow-up Bookings

The Follow-up Appointment function is useful when you wish to create a single follow-up job for the same **Client, Consumer, Language** etc. i.e. **if all parameters on the job are the same as the original with the exception of the scheduled time for the appointment.** Everything above the **Calendar** section of the original job will be copied to the Follow-up Appointment/Job.

You can access the **Follow-up** Booking function in a number of ways:

- From the **Dashboard** find the original **Booking** from which the **Follow-up** will be created (either in **Calendar** or **Tabular View**), click on the **Booking**/drop down menu beside the **Booking** and select '**Create Follow-up**' or
- From within the original **Booking** (after it has been saved or choosing **Edit** on the job action menu) click on the green **More** button on the left hand navigation pane and select '**Create Follow-up**'
- When the **Follow-up Booking** has been created, simply complete the **Booking** by selecting the **Expected Start Date**, entering the **Expected Start Time**, the **Duration Hours** and **Minutes**, and optionally any **Job Details** notes that pertain to this Booking.
- Finally click the blue **Save** button at the bottom of the page
- By selecting the **Recurring** tab within the original Booking or the Follow-up Booking you can see that the bookings are related as both will be listed
- Also note that related **Jobs** will have the same **Booking #** but unique **Job #**.

Create Recurring Bookings

The Recurring function is useful when you wish to **create multiple and regularly scheduled follow-up jobs for the same Client, Consumer, Language** etc. As with **Follow-up Bookings**, everything above the **Calendar** section will be copied to the Recurring Job(s). The

difference between a **Follow-up** and **Recurring Bookings** is that recurring jobs follow a set schedule such as daily, weekly or monthly, and you can create more than one of these in a single action.

You can access the **Recurring** Booking function in a number of ways:

- From the **Dashboard** find the original **Booking** which will be made recurring (either in **Calendar** or **Tabular View**), click on the **Booking**/drop down menu beside the **Booking** and select **'Make Recurring'** or
- From within the original **Booking** (after it has been saved or choosing **Edit** on the job action menu) click on the green **More** button on the left hand navigation pane and select **'Make Recurring'**
- You will receive a **Repeat Job** dialog box which will allow you to:
 - choose the recurring schedule - Daily/Weekly/Monthly
 - the day of the week of the recurrence as relevant
 - the date in the **Recurrence starts on:** field is the date of the original job therefore you should not change this unless you wish to reschedule the original job
 - number of occurrences (in addition to the original Booking) or the end date for the recurrence
 - click the **Make Recurring** button.

Repeat Job ✕

Repeats:

Repeat on:
 S M T W T F S

Recurrence starts on:

Ends:
 After additional occurrences
 By

- By selecting the **Recurring** tab within any of these Bookings you can see that the bookings are related as all of the jobs will be listed
- Also note that related **Jobs** will have the same **Booking #** but unique **Job #**.

Create Duplicate Bookings

The **Duplicate** function is useful when you wish to **create a single job where many but not all of the parameters are the same as the original job**. As with **Follow-up** Appointments, everything above the **Calendar** section will be copied to the **Duplicate** booking. The main **difference** between a **Follow-up** Appointment and a **Duplicate** job is that a duplicate, once created, will no longer be related to the original job, i.e. there will be no other jobs in the **Recurring** tab of the duplicated job and it will not share a **Booking #** with the original Booking. Therefore you can change any information on the **Duplicate** booking without affecting the original booking while saving time on data entry.

You can access the **Duplicate** Booking function in a number of ways:

- From the **Dashboard** find the original **Booking** which you will **Duplicate** (either in **Calendar** or **Tabular View**), click on the **Booking**/drop down menu beside the **Booking** and select '**Duplicate**' or
- From within the original **Booking** (after it has been saved or choosing **Edit** on the job action menu) click on the green **More** button on the left hand navigation pane and select '**Duplicate**'
- You can then Edit any of the parameters on the Booking as required
- Finally click the blue **Save** button at the bottom of the page

Monitoring & Updating Bookings

You can View a **Booking** at any time to monitor its status, for example a **Booking** has changed from **Open** to **Assigned**; use the **Calendar** or **Tabular View** on the **Dashboard** or use the job actions menu to see more. You can navigate to the **Assignments** tab to see the **Interpreter** that has been assigned. Note that as a Requestor you will also receive email notifications from the Agency if there are any changes to the job and as the job moves through the Workflow.

To make a change to a **Booking** you can click on the **Booking** and select **Edit** (note that your Agency may disable edits within a certain timeframe of the **Expected Start Date/Time**). Make any changes as required and remember to **Save** the Booking.

Note that for Related **Bookings (Recurring and Follow-up)**, any changes made to the **Booking** above the **Calendar** section will persist across all related **Bookings**. Any changes made to the **Calendar** section or below will prompt you as to how the changes should apply within the related set such as to all bookings, all future bookings etc.

Closing & Cancelling Bookings

If enabled by your Agency you can **Close** or **Cancel** Bookings when the appointment is complete or the appointment is no longer required for example. Note that some agencies will require Interpreters to Close/Cancel jobs.

To Close a Booking

- From **Calendar View** click on a **Booking** to access the actions menu, or
- In **Tabular View** use the drop down menu next to the **Booking**, or
- Within the **Booking** use the green **More** button
- Select **Close**
- Modify the **Start/End** times as appropriate
- Click on the **Browse** button to upload the **VoS**
- Click on **Add Incidental** to add Mileage, Parking etc. repeat this process for individual **Incidentals**

- Click the **Next** button and you will receive a **Close** success message

Close Job #2888953 x

Details

Arrival Date / Time*

Start Date / Time*

End Date / Time*

VoS* Paperwork to be Submitted **Offline**

Job Close Notes*

Incidentals (Get Mileage) 3

 Additional Documents

4

- If an **Interpreter** has **Closed** the **Booking** and you wish to view the **VoS**, you can access this and any other documents attached to the **Booking** on the **Documents** tab in the top right section of the **Booking**.


To Cancel a Booking


Note that as with Booking updates, your Agency may disable **Cancellations** within a certain timeframe of the **Expected Start Date/Time**

- From **Calendar View** click on a **Booking** to access the actions menu, or
- In **Tabular View** use the drop down menu next to the **Booking**, or
- Within the **Booking** use the green **More** button
- Select **Cancel**
- Choose a **Cancellation Reason** from the drop down menu
- Enter any **additional information** relevant to the **Cancellation**
- Click the **Cancel Booking** button and you will receive a success message

Cancel Booking



Please select the reason for the cancellation in this field: * 

[Choose a Cancellation Reason] 

1

Please enter any additional information for the cancellation in this field:

2

3

Cancel Booking

Close

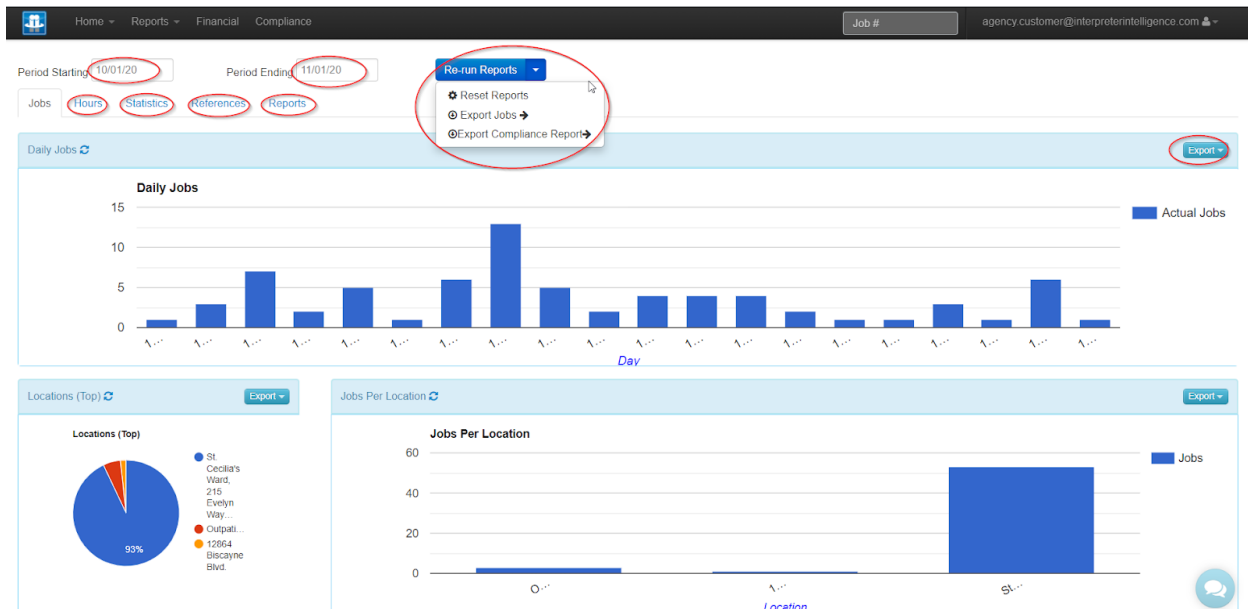
Reports (if enabled by your Agency)

Interpreter Intelligence has a number of reports that provide insight into the data related to your appointments. These reports will give you more visibility into your **Booking** statistics overall as well as by **Location** and **Language**.

To access **Reports** (if this has been enabled for you by your Agency), go to the '**Reports**' menu and select '**Overview**'.

You can specify the **Period Starting** and **Period Ending** to include in the **Reports**, such as a Daily, Weekly or Monthly View. The data on the **Jobs** tab is presented graphically, while the **Hours** and **Statistics** tabs will display Tabular data as well as some additional data such as **Cancellation & Unfulfilled Reasons**. The **References** tab will give you data on the **Additional References** that are collected within **Bookings** if enabled.

You can **Export** the raw data from any individual **Report** as well as using the **Export** options under the **Re-run Reports** button.



Financials (if enabled by your Agency)

The **Financial** menu will allow you to view **Invoices** generated for you by your Agency. The summary page will display a high level view of all available **Invoices**. You can hover over the status icon (**St.**) to get a quick view of the status of any individual **Invoice** and you can filter this table by **Invoice Status** and any of the other columns available.

The **View** commands found under the action menu for a particular **Invoice** will allow you to view the **Invoice** in detail as well as **Print** or **Save** a pdf document of the actual **Invoice**. You can also **Export a Customer Summary Report**.

For further information on the Customer Portal please also view the [Interpreter Intelligence Customer Portal Overview video](#)