

# Interactions

**Interactions** can be used to track issues, complaints or additional information relating to specific appointments or more generally. This provides a separate location to store sensitive or additional information outside of the **Booking** itself.

## Creating Interactions

An **Interaction** can be created in a number of ways

1. Go to the **'Manage'** menu and select **'Create New'** from the **Interactions** section. Populate the form as required and **Save**. You will notice that there is a **Documents** tab where you can store any related attachments. There is also a **Comments** tab where you can add progress, actions to be taken etc. once the Interaction has been created and saved.
2. You can also Create an Interaction directly from a **Job**, for example, from **'Home'** > **'Manage Jobs'**, select the dropdown menu next to the relevant Job and select Create Interaction, a pop up window will appear with a partially populated **Interaction** form which you can update as appropriate and **Save**.
3. Finally, you can trigger automatic **Interactions** from specific **Cancel Reasons**. Go to **'Admin'** > **'Company'** > **Cancel Reasons tab**. When creating or editing a **Cancellation Reason**, you can enable the flag **'Create Interaction'** (see Cancel, Unfulfilled & Deactivation Reasons.pdg for more details). This means that when a **Job** is **Cancelled** and the **Cancel Reason** chosen has **'Create Interaction'** enabled, this will automatically create an **Interaction** which you can then track. For example, you may wish to create an **Interaction** for **Jobs** cancelled due to the Interpreter not showing up to the appointment.

## Managing Interactions

You can Manage Interactions at any time by going to the **'Manage'** menu and select **'Manage Interactions'** from the **Interactions** section.

Use the dropdown menu next to any of the **Interactions** to **View More, Edit** or **Close**.

You can also **Export Interactions** by using the select all box at the top of the grid. You can also filter by any of the columns within the grid such as **Interpreter**. If you do filter the grid, make sure to select the **'Export all interactions (with current filters applied)'** box prior to the **Export**.

If you require any additional information, please contact [support@interpreterintelligence.com](mailto:support@interpreterintelligence.com)