Creating a Requestor

A Requestor is a user at your customer's organization who will request bookings and can also be given access to Boostlingo ii if required. Requestors with Customer Portal access can Create Jobs as well as view the Calendar of existing appointments and their status, view Reports and a level of Financial information, all depending on their permissions that you will set for them as an agency. The Customer profile for the appropriate Requestor should be set up first, as you will need to associate the Requestor with the relevant Customer.

Navigate to the 'Manage' Menu and select 'Create New' from the 'Requestors' section:

➔ Populate all fields marked with a red asterisk *

➔ Note that you will create the Username for the Requestor at this point (or you can click the pencil icon and a Username will be auto generated using first & last name), but they will not have access to the portal until you enable their account for access, see below. Do not use special characters in the username such as the & as this can affect behavior on the customer portal.

➔ Save the profile using the blue Save button in the navigation pane to the left hand side

➔ Once saved, you need to add a Customer Association for the Requestor by clicking the blue Add Association button at the bottom of the page - start typing the Customer name and the system will perform a lookup on saved Customers, select the appropriate Customer. If the Requestor should be able to see all appointments for this Customer, leave the Client and Location fields blank. If you want to limit their access to a specific Client or Location, then you can fill in the those fields

➔ Click Save to the right-hand side of the Customer association

➔ A Requestor can be associated with more than one Customer, so if needed, add more associations here by repeating the process above

➔ Finally, save the profile using the blue Save button in the navigation pane to the left-hand side.

You can Navigate back to the ‘Manage’ Menu and select ‘Manage Requestors’ from the ‘Requestors’ section. From here you can:

- ➔ Filter Requestors by typing into any of the columns at the top of the table or by selecting the dropdown menu where available
- ➔ Select the drop-down menu next to a Requestor to View or Edit a profile
- ➔ Export data for reporting purposes etc.

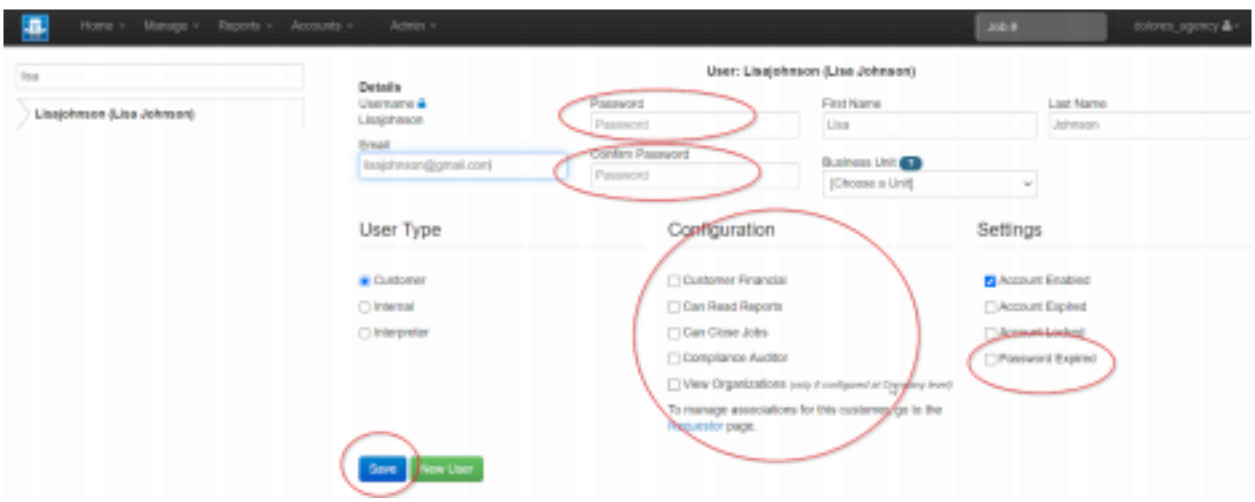
Setting up Customer Portal Access for a Requestor

Once the Requestor profile is saved, they can be selected as Requestor on jobs and receive notifications about those jobs. If you also want to give them access to the Customer Portal, please complete their online access setup as specified below. Note that this is not a required step, you may have many Requestors that are set up in the system that have a role as the Requestor of the booking, but may not require Customer Portal access. If you would like the Requestors to be able to enter jobs directly, they will need access to the Customer Portal.

Navigate to the ‘Admin’ menu and select ‘User Management’

In the user search box, start typing the Requestor’s Username that you assigned when creating the Requestor profile, then select the appropriate user from the results

- ➔ The Username, Email (if supplied in the profile), First Name and Last Name will pre-populate from the Requestor profile
- ➔ The User Type will be set to Customer
- ➔ Create a Password and Confirm Password for this user
- ➔ Define their user permissions in the Configuration section (most of these options will be a corresponding menu item on Customer Portal):
    - ◆ Customer Financial - Requestor can view payments per job and invoice status
    - ◆ Can Read Reports - high level reporting on jobs for that customer
    - ◆ Can Close Jobs - can close and/or cancel jobs
    - ◆ Compliance Auditor - audit certain requirements on the agency such as Interpreter eligibility & certification
    - ◆ View Organizations (only if configured at company level) - ability to view how Customers may be organized/grouped if in use by the agency
- ➔ Under Settings ensure that Account Enabled is checked and we recommend that you check the Password Expired setting to prompt the user to update their password upon their first login, so they become the only owner of their credentials
- ➔ Save the user record using the blue Save button at the bottom of the page
- ➔ You can now provide the username and password to the Requestor to allow Customer Portal access.



Further details on the use of the Customer Portal will be provided in a separate training document, and you can also find additional details on accounts and User Management within the Configuration documentation.