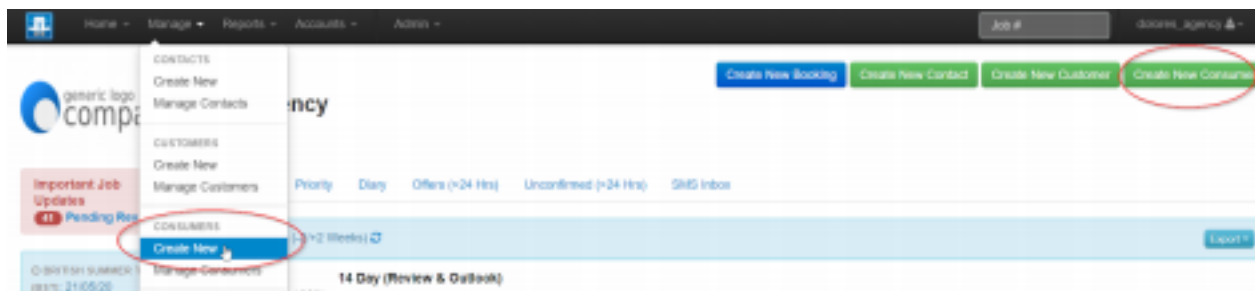


A **Consumer** is the individual that is receiving the service as specified on the job. It is not mandatory for an agency to use the Consumer within ii, but this feature will allow you to specify interpreter exclusions and preferences, to have a job history for the same Consumer and to associate **Consumers** with **Customers** if preferred.

To create a Consumer:

- Click on the green '**Create New Consumer**' button on the top right-hand side of the Dashboard, or
- Navigate to the '**Manage**' Menu and select '**Create New**' from the '**Consumers**' section.¹



This will open the '**General Information**' tab:

- as you may have limited information on Consumers, the only required fields are **First Name** and **Last Name**
- Ensure that the **Active** flag is enabled
- If you do have additional information for the **Consumer**, such as phone number, email address etc. this will prove useful when creating jobs, especially if you have a large consumer database, as you will be able to search for a specific **Consumer**, not only by their name, but also by other parameters on the profile, such as **Email**, **Phone Number** or **Record Number**. Also, if you use the Video (Scheduled) service, the **Consumer** will be emailed a link to the video session on the job, if an email address is stored on their profile, which will allow them to access the video conference without any assistance from a **Requestor**.

¹ If you have more than 100 profiles to set up, you may benefit from importing profile data in bulk. For details on how to import Customer, Contact, or Requestor profiles in bulk, please contact us at support@interpreterintelligence.com

On the '**Exclusions & Preferences**' tab, you can select any **Interpreters** that are excluded from working with this **Consumer** - these **Interpreters** will not appear in the eligible list of **Interpreters** when assigning jobs for this **Consumer**. And you can select Preferred **Interpreters** for this **Consumer**:

- Start typing the **Interpreter** name in the **Manage Exclusions** box
- Select from the dropdown menu and click **Add**
- The **Interpreter** is then stored in the resulting Exclusions table and this can be deleted at any time by selecting the x in the **Remove** column
- Repeat this process in the **Manage Preferences** section - Preferred **Interpreters** will be designated as such when assigning jobs for this **Consumer**

Moving to the **Customers** tab - **Consumers** can be company-wide (default) or Customer-Specific. If **Consumers** are set to be Customer-Specific, when **Requestors** enter new jobs on the Customer portal, they will only be able to select from a list of **Consumers** associated with them as a **Customer**. If you would like to switch to the **Customer-Specific Consumer** setup, please contact support@interpreterintelligence.com for further details as there are several steps for this configuration.

On the **Criteria** tab you may specify **Criteria** required for working with this **Consumer**.

On the **Audit History** tab, you can access a record of updates, and by whom, made to the **Consumer** since creation.

