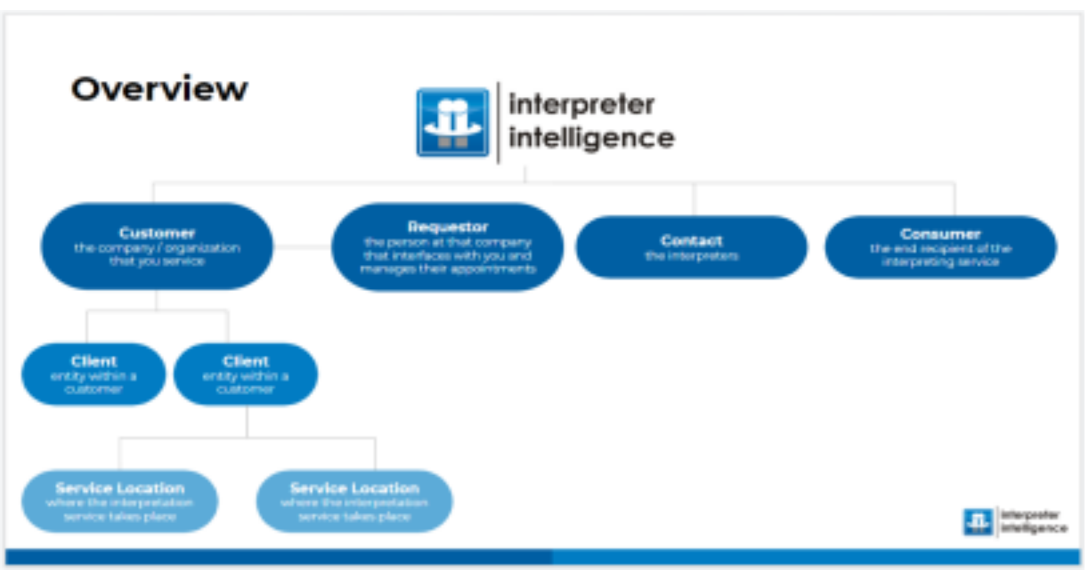
Creating a Customer

This guide will walk you through Customer setup in Boostlingo ii (we call it ii). A **Customer** is the company/organization you/the agency service; a **Requestor** is the person at that company that interfaces with you and manages their appointments; an interpreter is called a **Contact** in ii; the end recipient of an interpreting service is called a **Consumer.**

Customer hierarchy:

- **Customer** - This is the entity that you will typically send an invoice to from ii. When automatically generating invoices, the invoice will be created at this level. The Customer level contains the billing information (name, address, email, contact person etc.). A Customer can have one or more Clients below it.
- **Client** - Client is a grouping below Customer and allows you to segregate jobs at this level. Another term for a Client might be department, e.g. Radiology, Outpatients for a Hospital set up as a Customer. In many cases if you are working with a smaller Customer, there will simply be a 1 - 1 mapping between Customer and Client. E.g., Dr. Hughes Clinic (Customer) will have 1 single Client which can be of the same name - Dr. Hughes Clinic. But of course, for larger Customers you can leverage the Client breakdown to suit your needs, i.e. larger Customers will have several clients. You could generate invoices at the Client level, however you lose the automation as it is a manual step to break up the invoices and the billing information is always picked up from the Customer level.
- **Service Location** - This is a physical address for a job where the service will be carried out. E.g., 1111 Stanyan Street, SF 94127. A Service Location is always linked to a particular Client. For larger Customers the Service Location(s) will likely be different from the Customer's main address.

To summarize, a Customer may have many Clients and each Client may have many Service Locations as illustrated in the chart below.



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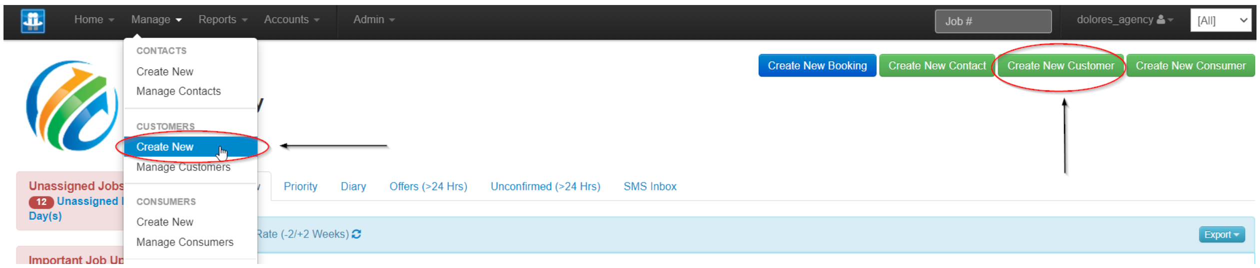
To create a new **Customer**:

- Click on the Green **Create New Customer** button on the top right-hand side of the Dashboard, or
- Navigate to the **'Manage'** Menu and select **'Create New'** from the **'Customers'** section[1]



The **General tab** captures the basic information about your **Customer**. All fields with a red asterisk * must be populated at minimum. You can hover over the **'?'** icons to view help text for any field. [2]

The **Special Instructions** content will only be visible to the relevant audience, for e.g. **Internal Special Instructions** will only be visible to the agency. Any data saved in the **Special Instructions** field on the **Customer** profile will automatically pre-populate on all jobs for that **Customer**.

[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

[2] If you plan to integrate with QuickBooks, for both Customer and Contact profiles, either the Name or the Accounting Reference field value must match the QuickBooks name for Customer or Vendor.

In the **Classifications** section you must choose a **Contract Type**:

- **Ad-hoc** means that you would send this **Customer** a quote for every job that is created, and only upon their approval will you assign an interpreter;
- **Contract** is a **Customer** who has an established contract with your agency, and your scheduling team can start looking for an interpreter as soon as the request is entered, no further approval process is needed.

All jobs created in ii for Contract **Customers** will have an **Open** status by default; jobs created for an Ad-hoc **Customer** will default to **New** status as the pricing must be agreed prior to the job being moved to **Open** status. You will notice that you cannot assign Interpreters to a job that is in **New** status.

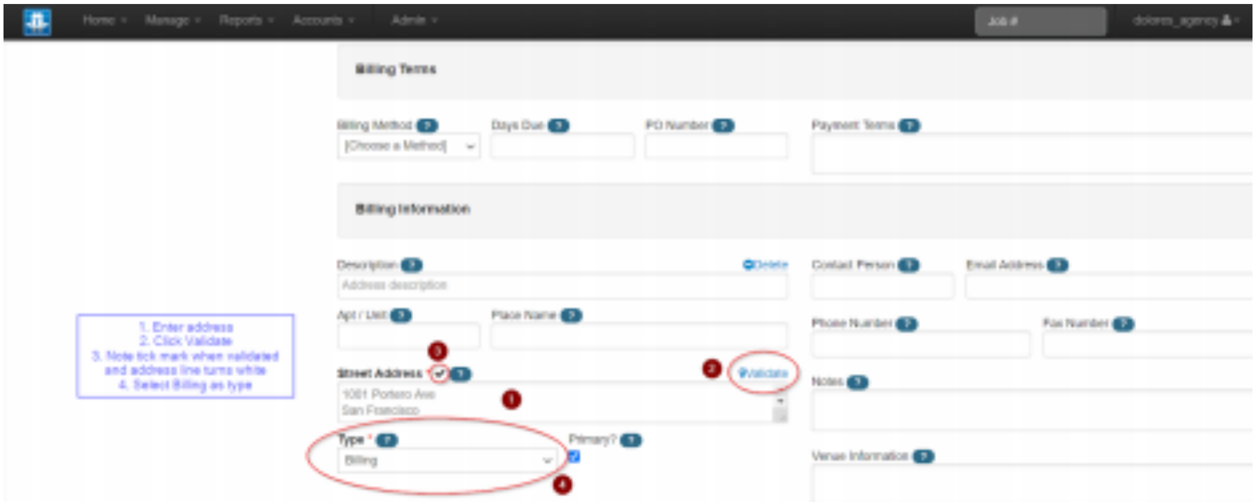
At the outset, the **Customer** should be set to **Active**. If for any reason in the future you no longer work with the Customer, they can be set to **Inactive** and will no longer appear in the **Customer** menu for new jobs.

Most information in the **Billing Terms** section is optional, but you must specify at least one address within the **Billing Information** section and mark it as **Billing** type - this is to ensure that **Invoices** sent to **Customers** will be populated with a valid address.

Wherever you see an address box within ii, once you have entered the address you must click the **Validate** button, this will resolve the address with Google maps to ensure that it is accurate - a tick mark ✓ will appear above the address box if this is successful.
In some cases the address box may turn yellow and you may receive a message that multiple matches have been found, in this case you should review the matches in the message and refine the address accordingly, for example adding a postcode or some additional details in the address will correct the match.

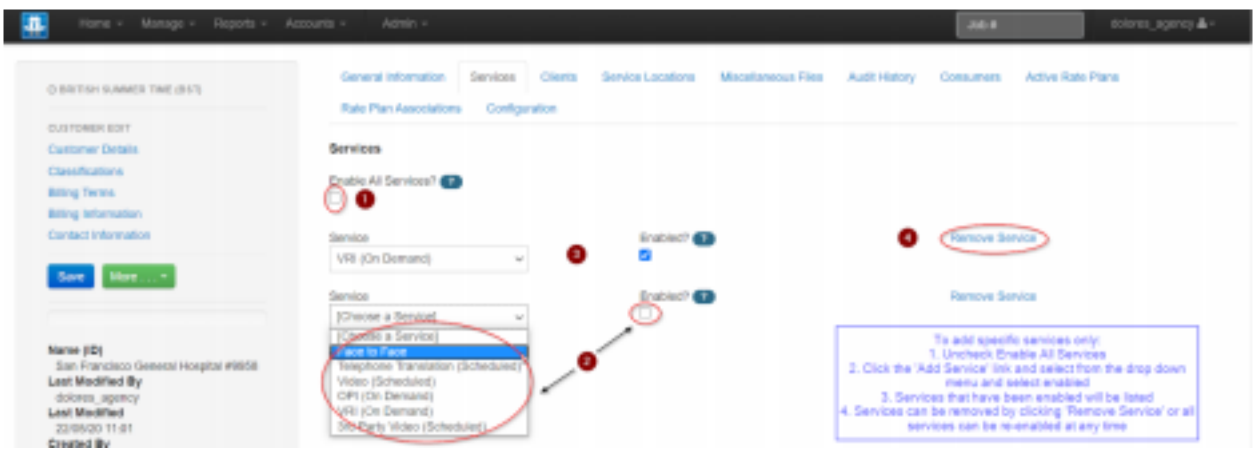
You can also enter additional addresses for other purposes such as an alternative to the billing address like Company HQ.

Within the **Contact Information** section, you must add at least one address and phone number. Just to recap, addresses added at the **Customer** level (**General** tab) have no bearing on where jobs take place, this is handled at the **Service Location** level, see below.



On the **Services** tab you can define what service types this **Customer** will use. Service types define the medium of the service or how the job is carried out, e.g. Face to Face, Video, Telephone etc. By default, new **Customers** will be enabled for all services that have been set up for your agency, however you can refine/restrict services at the **Customer** level:

➔ Uncheck the **Enable All Services** box
➔ Select **Add Service**
➔ Choose the appropriate service from the drop-down menu and check the **Enabled** box.
➔ Repeat this process to enable any additional services
➔ Click the blue **Save** button on the left hand side to save these changes
➔ If service types change for the **Customer** into the future you can simply uncheck the **Enabled** box or click **Remove Service** and **Save** the changes



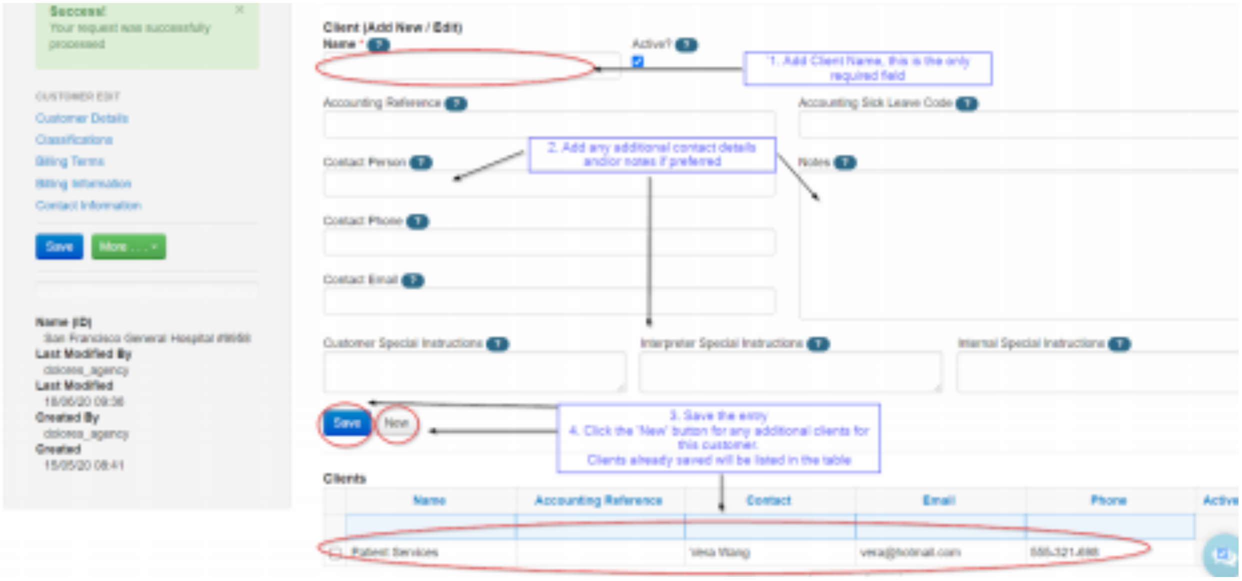
The next tab is the **Clients** tab. **Clients** are the departments within your **Customer** organization, e.g. in the case of a Hospital, every department or certain services within the hospital could be a **Client** such as Patient Services, Radiology etc.

If the **Customer** does not have departments, please add a single **Client** on this tab with the same name as the **Customer**, as **at least one Client record is required for every Customer profile**.

To create a **Client**:

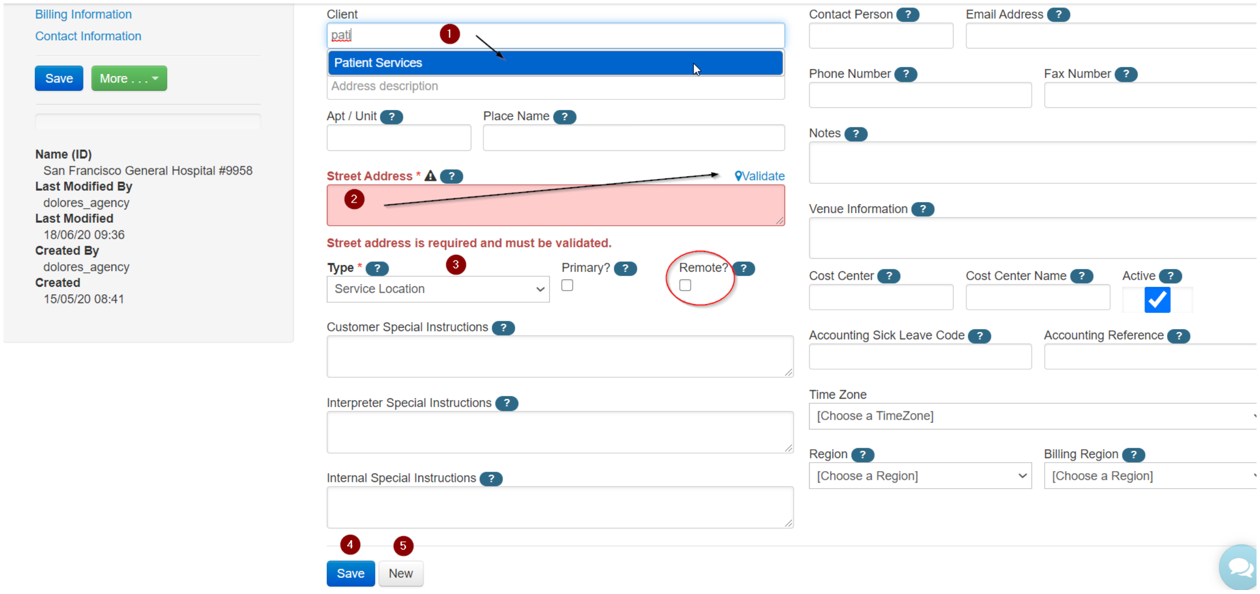
➔ Enter the Client details - only the **Client Name** is required, all other fields are optional
➔ Click the **'Save'** button at the bottom of the form

- ➔ Click the **'New'** button for any additional **Clients**
- ➔ Saved **Clients** will be listed in tabular form at the bottom of the page
- ➔ Note that saved **Clients** will appear as **Active** in this table, if any of these clients become obsolete in the future they can be deactivated by selecting the **Client** in the table below and then unchecking the **Active** box on the **Client** profile above that and saving the **Customer** profile.



Let's move onto the **Service Locations** tab - this is where the service/job will take place:

- ➔ Each **Location** must be associated with a **Client**, so to begin you must enter the **Client** Name - start typing the name in the **Client** field and the system will lookup saved **Clients**, then select the **Client** from the lookup
- ➔ Type the address in the **Street Address** box and click **Validate**, note the tick mark ✓ when the address is valid. Note: if you are using a fake location for Remote Services where an actual address is not relevant, for example a Location called "Video Remote", check the **Remote** box under the address and the address will not require validation
- ➔ Populate the remainder of the form as preferred
- ➔ Click the **Save** button at the bottom of the form
- ➔ Click the **New** button for any additional **Locations**
- ➔ Saved **Locations** will be listed in tabular form at the bottom of the page
- ➔ Note that saved **Locations** appear as **Active** in this table, if any of these **Locations** become obsolete in the future, they can be deactivated by selecting the **Service Location** in the table and then unchecking the **Active** box in the **Location** profile above that and saving the **Customer** profile.



To recap from the flow chart at the start of this document; a **Customer can have multiple Clients** and a **Client can have multiple Locations**. At minimum, a **Customer must have at least one Client** and a **Client must have at least one Service Location**.

On the **Miscellaneous Files** tab you can add any documents relevant to this **Customer**, e.g. a contract. Note that this information will only be accessible to agency users.

Finally, don't forget to save the **Customer** profile using the blue **Save** button in the navigation pane to the left-hand side. And now you have successfully completed a **Customer** profile!

You can Navigate back to the **'Manage'** Menu and select **'Manage Customers'** from the **'Customers'** section. From here you can:

➔ Filter for a specific **Customer** by typing into any of the columns at the top of the table ➔ Use the advanced **Search** function

➔ **Export** data for reporting purposes

➔ Select the drop down box to see a menu of various actions on individual customers such as editing the profile or creating bookings.