

# STAFF MEMBER WITH VENDOR PROFILE

## SET UP STAFF MEMBER WITH VENDOR PROFILE

Your staff members can have dual role in ScheduleInterpreter, as staff and as vendors. To add a vendor profile to one of your staff members, go to TOOLS AND SETTINGS, CONTROL CENTER, ACCOUNT SETTINGS, STAFF MEMBERS, locate the staff member needed, then click **EDIT**.

The screenshot shows the ScheduleInterpreter interface. The top navigation bar includes SCHEDULE, ACCOUNTING, TOOLS AND SETTINGS (selected), ANALYTICS, TRAINING, and LOG OUT. Below this is a sub-navigation bar with icons for My settings, Compliance center, Control center, Communication center, New account, and New interpreter. The main content area is titled 'CONTROL CENTER' and has tabs for FORMS, VDO, TAGS, EXPENSES, ACCOUNTING AND FINANCE, and ACCOUNT SETTINGS (selected). Under ACCOUNT SETTINGS, there are sub-tabs: BRANCH OFFICES, GLOBAL LOCATIONS, STAFF MEMBERS (selected), INTERPRETING, and TIME MANAGEMENT. A 'QUICK SEARCH' box is present. The 'STAFF MEMBERS' section shows a list of staff members with an 'EDIT' button next to each. The list includes: Developer, App (Mr.) :: 1736, Developer, Azure :: 1832, Doe, John (Mr.) :: 253 (highlighted), and Durham, Ginger (Ms.) :: 161.

Scroll down, check VENDOR PROFILE box, then click **SAVE CHANGES**.

The screenshot shows the 'VENDOR PROFILE' settings form. It includes a 'BETA' label and a 'SERVICES TO MANAGE' section with checkboxes for OSI, OPI, VRI, and VIS. The 'VENDOR PROFILE' section has a checkbox that is checked. Below this is a 'VENDOR PROFILE' box with text: 'When checked, staff member will have a profile as a vendor. Designation to 1099-MISC or W-2 form of employment can be set in VENDOR CENTER.' Other settings include 'ALLOW EDI', 'ACTIVE', 'BLOCKED', 'DELETED', and 'RECEIVE E-MAILS'. A 'SHOW ADVANCED SETTINGS' button is visible. At the bottom, there is a 'PASSWORD' field, a 'SET PASSWORD' button, a 'SAVE CHANGES' button, a 'CANCEL' button, and a 'FINISH' button.

To complete the vendor profile, go to TOOLS AND SETTINGS, ACCOUNTS AND USERS, VENDOR CENTER, type the name of the staff member/vendor, and select them from the drop down list.

SCHEDULE

ACCOUNTING

TOOLS AND SETTINGS

ANALYTICS

TRAINING

α

LOG OUT

My settings

Compliance center

Control center

Communication center

New account

New interpreter

Account tools

Accounts and users management

ACCOUNTS AND USERS

Account center 65

Vendor center 93

Consumer center 11

DATA EXPORT

LABS

VENDOR CENTER

VENDORS

MY SETTINGS

GLOBAL SETTINGS

To add or update vendors' information click EDIT button on the right side of the row.

1099-MISC

W-2

1099-MISC VENDORS

john

Doe, John :: 1797

Doe-Interpreter, John (Mr.) :: 198

Masters, John (Mr.) :: 260

Nguyen, John (Mr.) :: 167

Smith, John (Mr.) :: 1799

TheInterpreter, John (Mr.) - Mr TheInterpreter :: 157

White, John (Mr.) :: 73

White, John (Mr.) :: 74

White, John (Mr.) :: 75

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QBO SYNC

Once you select the vendor, you can set up their profile, including skills, rates, exclusions, notes, tags, and several other settings.

## RESET PASSWORD FOR VENDORS

In order for your staff members with vendors profiles to log in and use On The Spot!, you will need to reset their password under their vendor profile. To do so, go to PROFILE : TAX ID : PASSWORD tab, then PROFILE, and scroll down to SHOW PASSWORD RESET OPTIONS.

VENDORS

DOE, JOHN :: 1797

MY SETTINGS

GLOBAL SETTINGS

GENERAL

PROFILE : TAX ID : PASSWORD

TIME OFF

SmartID™

SKILLS

RATES AND INVOICES

EXCLUSION LIST

VENDOR NOTES

PROFILE

COMPLIANCE

PROFILE STATUS

☒ Confirm at login
 ☐ Activated
 ☐ Suspended
 ☐ Deactivated
 

?

QUICKBOOKS ONLINE

SYNCHRONIZE

?

SEND E-MAILS

☐

?

ALLOW SELF-ASSIGN

☐

?

SEND TEXT MESSAGES

☐

?

BLOCK FROM PUBLIC LISTING

☐

?

SEND PUSH NOTIFICATIONS

☐

?

RESET TEXT AUTHORIZATION

?

HIRE/START DATE

?

FIRE/END DATE

?

\*

USER NAME

john.doe.1797

?

INTERNAL RATING

None

?

\*

SSN / EIN

999999999

?

COUNTRY OF ORIGIN

?

THIS IS EIN

☐

?

VENDOR ID

?

COLOR

☐

?

SAVE CHANGES

SHOW PASSWORD RESET OPTIONS

Enter and confirm the new password, making sure to review and follow the password requirements, then click

## CHANGE PASSWORD

### ⊖ HIDE PASSWORD RESET OPTIONS

\* NEW PASSWORD  ?

\* CONFIRM PASSWORD  ?

CHANGE PASSWORD

#### NEW PASSWORD

Create vendor's new password. Password should be between 8 and 30 characters. Make your password hard to guess to ensure your account is well protected. Best practice calls for mixture of numbers and letters. Passwords are case sensitive.

Password can contain letters, numbers, dash "-", underscore "\_" and dot "." symbols.

Example of a good password **gvMEaBr3ak**

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