

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. At the top, there are navigation tabs: SCHEDULE, ACCOUNTING, TOOLS AND SETTINGS (selected), ANALYTICS, TRAINING, and LOG OUT. Below these are icons for My settings, Compliance center, Control center, Communication center, New account, and New interpreter. A sidebar on the left contains sections: ACCOUNTS AND USERS (Account center: 65, Vendor center: 93, Consumer center: 11), DATA EXPORT, and LABS. The main content area is titled 'CONTROL CENTER' and has sub-tabs: 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' list shows four entries: Developer, App (Mr.) :: 1736; Developer, Azure :: 1832; Doe, John (Mr.) :: 253 (highlighted in blue); and Durham, Ginger (Ms.) :: 161. Each entry has an 'EDIT' button.

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

The screenshot shows the 'VENDOR PROFILE' settings page. It features several toggle switches: SERVICES TO MANAGE (checked), OSI (checked), OPI (checked), VRI (checked), and VIS (unchecked). The VENDOR PROFILE toggle is checked and highlighted with a blue circle. A tooltip box explains: '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 toggles include ALLOW EDI (unchecked), ACTIVE (checked), BLOCKED (unchecked), DELETED (unchecked), and RECEIVE E-MAILS (checked). Below these is a '+ SHOW ADVANCED SETTINGS' button. A 'PASSWORD' field is empty. At the bottom are buttons for SET PASSWORD, SAVE CHANGES, CANCEL, and FINISH.

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

i 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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