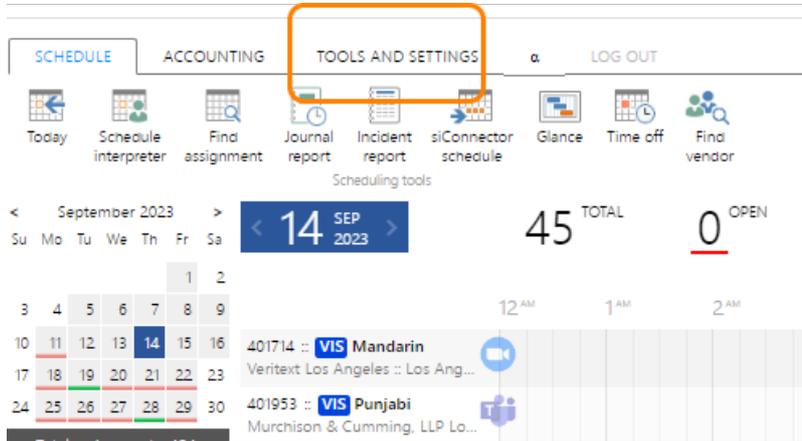


# GUIDE - CREATING PARENT ACCOUNTS

\* The following steps are only available to Admin Users. \*

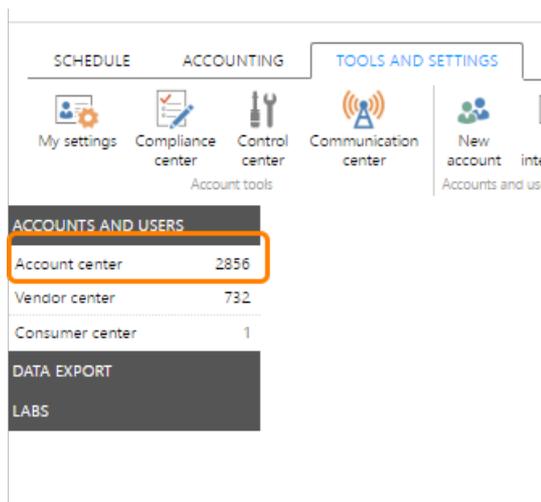
## 1. Go to Tools and Setting Tab

Navigate to the top menu in ScheduleInterpreter.



## 2. Navigate to Account Center

View the sidebar menu under Accounts and Users.



- [QUALITY CONTROL CHECK](#)

Key in the name of the account you will be adding before adding the account. This is to double check that the account is not already in our system and will prevent any duplicates. If nothing comes up, proceed to the next step.

## ACCOUNT CENTER

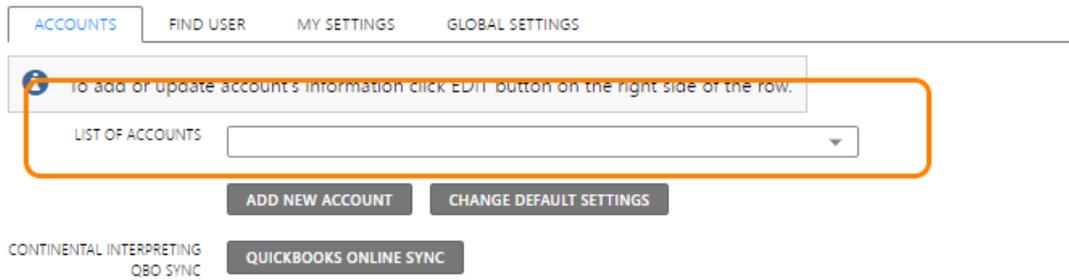
ACCOUNTS FIND USER MY SETTINGS GLOBAL SETTINGS

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

LIST OF ACCOUNTS

ADD NEW ACCOUNT CHANGE DEFAULT SETTINGS

CONTINENTAL INTERPRETING QBO SYNC QUICKBOOKS ONLINE SYNC



### 3. Select Add New Account

\* Tip: Gather all account information ahead of time to make this step more efficient \*

ACCOUNT CENTER

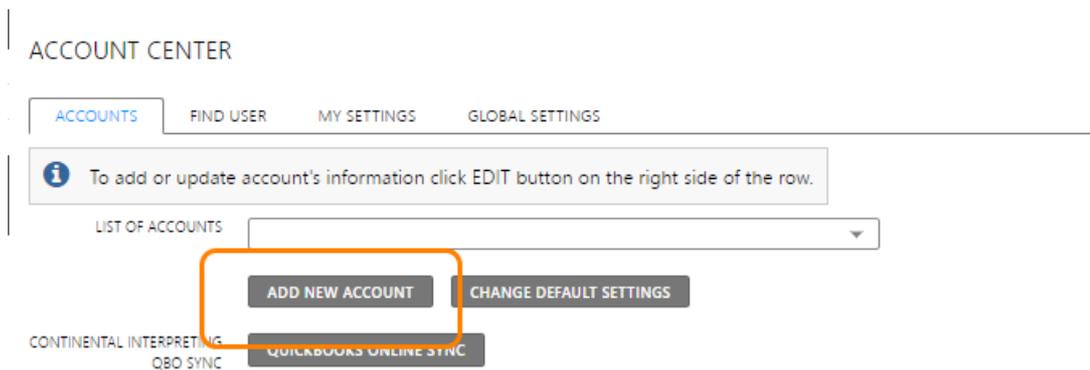
ACCOUNTS FIND USER MY SETTINGS GLOBAL SETTINGS

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

LIST OF ACCOUNTS

ADD NEW ACCOUNT CHANGE DEFAULT SETTINGS

CONTINENTAL INTERPRETING QBO SYNC QUICKBOOKS ONLINE SYNC



### 4. Fill Out Necessary Fields

\* Do not click on Sub Account \*

## ACCOUNT CENTER

ACCOUNTS   CORVEL CORPORATION - CONCORD   FIND USER   **ADD NEW ACCOUNT**   MY SETTINGS   GLOBAL SETTINGS

SUB ACCOUNT  ?

\* ACCOUNT NAME  ?  
must be at least 3 characters long, no special symbols

ACCOUNT NAME QUICKBOOKS  ?

ACCOUNT ALIAS NAME  ?

\* ACCOUNT TYPE  ?

\* COUNTRY  ?

\* STREET ADDRESS  ?

SUITE, BUILDING, FLOOR  ?

\* CITY  ?

\* STATE  ?

\* ZIP CODE  ?

\* TIME ZONE  ?

LOCATION IS OBSERVING DAYLIGHT SAVING  ?

**SUBMIT**   **CANCEL**

- **ACCOUNT NAME**
  - Enter the name and city with a dash as a separator (Example: Account Name - City)
- **ACCOUNT NAME QUICKBOOKS**
  - This will be generated automatically and should remain blank. Disregard unless instructed to overwrite the default.
- **ACCOUNT TYPE**
  - Choose an option that states the type of organization only (not including "Rates" or other information), such as "Law Firm," "Insurance Company," "School District," or "Court Reporting Agency."
- **COUNTRY**
  - By default, this will be United States.
- **ADDRESS INFORMATION**
  - Fill out street address, suite, building floor, city, state, zip code
- **TIME ZONE**
  - Be sure to select the correct time zone as clients could be in other time zones.
- **LOCATION IS OBSERVING DAYLIGHT SAVING**
  - This is checked by default. Leave as is unless instructed to change.

## 4. Submit

## 5. Navigate to Users Tab

You will add Users (Client Contacts) in the following tab. This is the only place where you can manage Users (i.e. Requester, Attorney, etc).

## ACCOUNT CENTER

ACCOUNTS NOTED REPORTERS, INC. FIND USER MY SETTINGS GLOBAL SETTINGS  
GENERAL LOCATIONS **USERS** ACCOUNTING AND FINANCE LIST OF SERVICES RATES :: POs AND BUDGETS :: POLICIES ACCOUNT NOTES TAGS SETTINGS On the Spot! Flawless Analytics

To add a new user, select Add New User.

## ACCOUNT CENTER

ACCOUNTS NOTED REPORTERS, INC. FIND USER ADD NEW ACCOUNT MY SETTINGS GLOBAL SETTINGS  
GENERAL LOCATIONS **USERS** ACCOUNTING AND FINANCE LIST OF SERVICES RATES :: POs A  
LIST OF USERS SCHEDULING DEPARTMENT  
USERS Department, Scheduling :: Manager (36525) ? **ADD NEW USER**  
MS TEAMS USERS ? **SAVE USERS**

The following is an example of a completed User profile with all the necessary fields and correct formatting.

## ACCOUNT CENTER

ACCOUNTS NOTED REPORTERS, INC. FIND USER MY SETTINGS GLOBAL SETTINGS  
GENERAL LOCATIONS **USERS** ACCOUNTING AND FINANCE LIST OF SERVICES RATES :: POs AND BUDGETS :: POLICIES ACCOUNT NOTES TAGS SETTINGS  
LIST OF USERS SCHEDULING DEPARTMENT  
SALUTATION ? \* USER NAME scheduling.department ?  
\* FIRST NAME Scheduling ? \* USER TYPE Manager ?  
\* LAST NAME Department ? ACCESS CODE OR ID ?  
OCCUPATION ? REQUIRES APPROVAL ?  
\* ADDRESS 27201 Puerta Real, Suite 130 ? \* E-MAIL Calendar@notedreporters.com ?  
SUITE, BUILDING, FLOOR ? SEND E-MAILS ?  
\* CITY Mission Viejo ? USE FOR IMPORTED ASSIGNMENTS ?  
\* STATE California ? SKYPE ?  
\* ZIP CODE 92691 ? \* TIME ZONE Pacific Time Zone ?  
PHONE NUMBER 833 608 3348 ? LOCATION IS OBSERVING DAYLIGHT SAVING ?  
MOBILE PHONE NUMBER ? PROFILE STATUS  Confirm at login  Activated  Blocked  Deactivated ?  
**SAVE PROFILE** **CLOSE**

- **FIRST NAME, LAST NAME, ADDRESS, CITY, STATE, ZIP CODE, PHONE NUMBER**
  - Fill this out as usual
  - You will notice in the example above, that the User profile that is used for a Department here is the Scheduling Department.
- **USERNAME**
  - Follow this format: first name.last name (i.e. "scheduling.department" for the example above)
- **USER TYPE**
  - Always enter "Manager" for the User Type.
- **EMAIL & SEND E-MAILS**
  - Enter the email as usual

- Be sure to select "Send E-mails" or the User will not receive automated notification messages from SI.
- **TIME ZONE**
  - Fill out as usual.
- **LOCATION IS OBSERVING DAYLIGHT SAVING**
  - This is checked by default. Leave as is unless instructed to change.
- **PROFILE STATUS**
  - Choose "Confirm at login"
- **PASSWORD SETTINGS**
  - You will need to set up a password for the new account.
  - Copy/paste the following into both Password and Confirm Password fields: Si2023.onbrd

**\*\* After you review the above, you can click Save \*\***

## 6. Review Settings (Documents and Conference Platforms) Tabs

Navigate and complete the following to finish setting up the Parent Account.

- **DOCUMENTS > INTERNAL SERVICE REQUEST TEMPLATE**
  - For Calendar/Legal, confirm that this form is set to "Legal Interpreting"

### ACCOUNT CENTER

ACCOUNTS	NOTED REPORTERS, INC.	FIND USER	ADD NEW ACCOUNT	MY SETTINGS	GLOBAL SETTINGS					
GENERAL	LOCATIONS	USERS	ACCOUNTING AND FINANCE	LIST OF SERVICES	RATES :: POs AND BUDGETS :: POLICIES	ACCOUNT NOTES	TAGS	SETTINGS	On the Spot!	Flawless Analytics
DOCUMENTS	CUSTOM PAPERWORK	OPTIONS	SCHEDULE	INTEGRATION	BRIDGE	VALIDATION	CONFERENCE PLATFORMS			
W-2 EMPLOYEE PAPERWORK TEMPLATE	Interpreter Assignment Confirmation - Legal									
W-2 EMPLOYEE MEMO TEMPLATE										
1099-MISC VENDOR PAPERWORK TEMPLATE	Interpreter Assignment Confirmation - Legal									
1099-MISC VENDOR CONTRACT TEMPLATE										
INTERNAL SERVICE REQUEST TEMPLATE	Legal Interpreting									
CLIENT SERVICE REQUEST TEMPLATE	Legal Interpreting									
CLIENT ON-DEMAND VRI REQUEST TEMPLATE										
CLIENT PAPERWORK TEMPLATE	Client Order Confirmation - Legal									
On the Spot! TEMPLATE										

- **CONFERENCE PLATFORMS**
  - The following platforms will be added automatically: Google Meets, Microsoft Teams, RingCentral, Zoom. Review that this looks good before saving your changes.

## ACCOUNT CENTER

ACCOUNTS **NOTED REPORTERS, INC.** FIND USER ADD NEW ACCOUNT MY SETTINGS GLOBAL SETTINGS

GENERAL LOCATIONS USERS ACCOUNTING AND FINANCE LIST OF SERVICES RATES :: POs AND BUDGETS :: POLICIES ACCOUNT NOT

DOCUMENTS CUSTOM PAPERWORK OPTIONS SCHEDULE INTEGRATION BRIDGE VALIDATION **CONFERENCE PLATFORMS**

PLATFORMS

<input type="checkbox"/>	Adobe Connect
<input type="checkbox"/>	All Access
<input type="checkbox"/>	amwell
<input type="checkbox"/>	Ascension Connect
<input type="checkbox"/>	Athena
<input type="checkbox"/>	AVA
<input type="checkbox"/>	BigBlueButton
<input type="checkbox"/>	Blackboard Collaborate
<input type="checkbox"/>	Blue Jay Health
<input type="checkbox"/>	BlueJeans
<input type="checkbox"/>	bluestream

RATE OPTION **OSI** ?

**SELECT ALL** **CLEAR ALL** **SAVE CHANGES** **APPLY TO ...**

## 6. Save Changes

You have completed setting up a Parent Account and can proceed to created Subaccounts with Rates (this is a separate step).

Revision #6

★ Created Thu, Sep 14, 2023 10:23 PM by Gabriela Garcia

✎ Updated Wed, Sep 20, 2023 4:48 PM by Gabriela Garcia