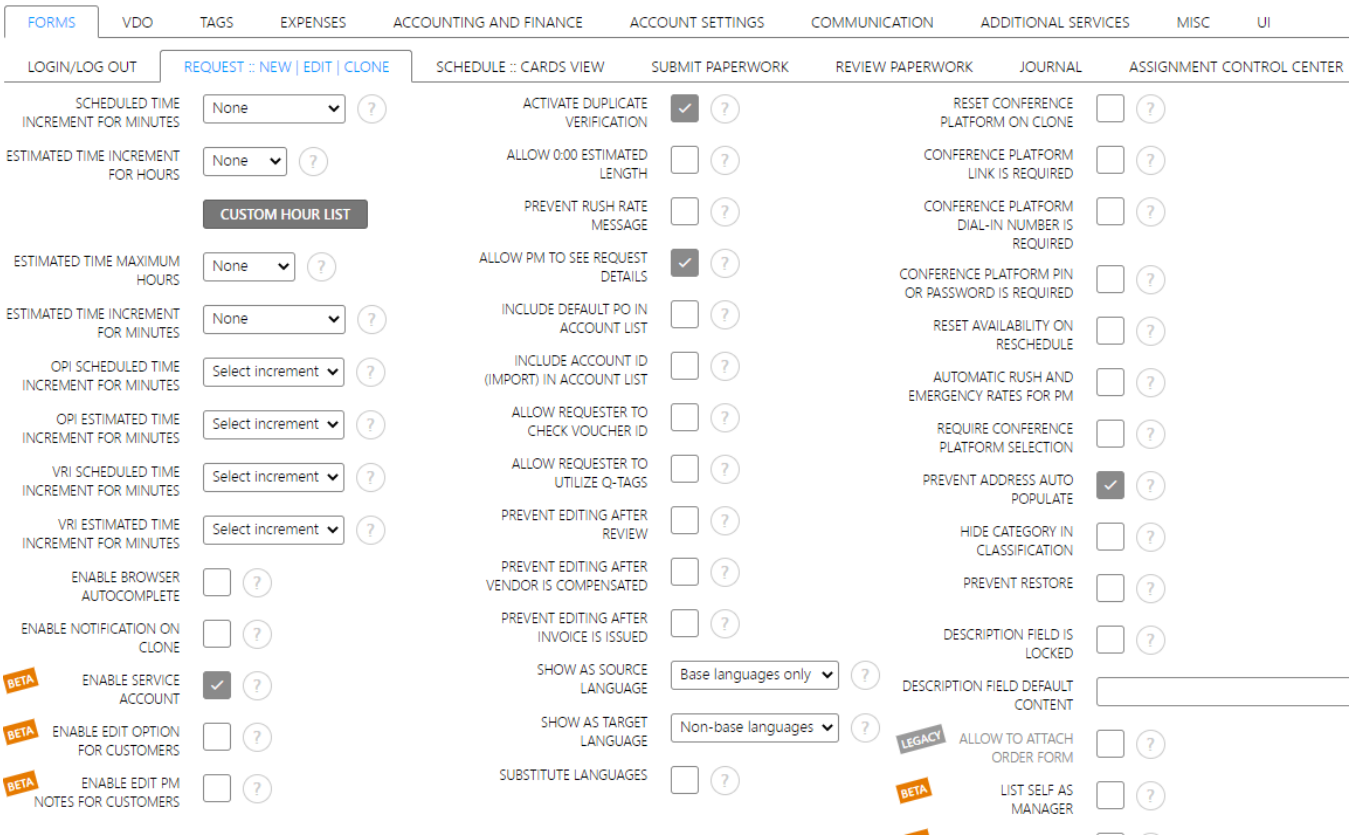
CONTROL CENTER

Forms > Request New | Edit | Clone

CONTROL CENTER



Schedule Cards View

FORMS | VDO | TAGS | EXPENSES | ACCOUNTING AND FINANCE | ACCOUNT SETTINGS | COMMUNICATION | ADDITIONAL SERVICES

LOGIN/LOG OUT | REQUEST :: NEW | EDIT | CLONE | SCHEDULE :: CARDS VIEW | SUBMIT PAPERWORK | REVIEW PAPERWORK | JOURNAL | AS

USE JOURNAL ON CANCEL ☐

USE ISO REPORT ON CANCEL ☐

SHOW UPCOMING APPOINTMENTS ☑

PREVIEW INVOICES AS HTML ☐

LOCK NO VENDOR ASSIGNMENTS ☐

VENDOR DOCUMENTS AS PDF ☑

SHOW MINIMUM BILLABLE ☐

ACCOUNT LINE: Account :: sub account

SHOW VENDOR PAPERWORK TO REQUESTER ☐

PREVENT CANCEL AFTER VENDOR IS COMPENSATED ☐

PREVENT REQUESTER TO CANCEL ☐

PREVENT REQUESTER TO RESCHEDULE ☐

HIDE VENDOR INVOICE WHEN CANCEL BILLABLE ☐

SHOW VENDOR INVOICE TO PM ☐

PREVENT PM TO CANCEL ASSIGNMENTS AFTER START TIME ☐

PREVENT CUSTOMERS TO CANCEL ASSIGNMENTS AFTER START TIME ☐

SHOW REVIEW CENTER IN CALENDAR ☐

SHOW MISSING PLATFORM LINK IN CALENDAR ☐

SHOW MY SETTINGS IN SCHEDULE ☐

VENDOR AVAILABILITY RESET: None

SHOW VENDOR NAME WHEN CANCELLED ☐

SHOW VENDOR RATES TO PM ☐

SHOW FIND VENDOR TO PM ☐

BLOCK NO VENDOR ☐

HIDE NO VENDOR BUTTON ☐

SHOW RESPONSES FROM ALL VENDORS ☐

SHOW VENDOR CENTER TO PM ☐

SHOW COMPLIANCE CENTER TO PM ☐

ISOLATE SCHEDULE ☐

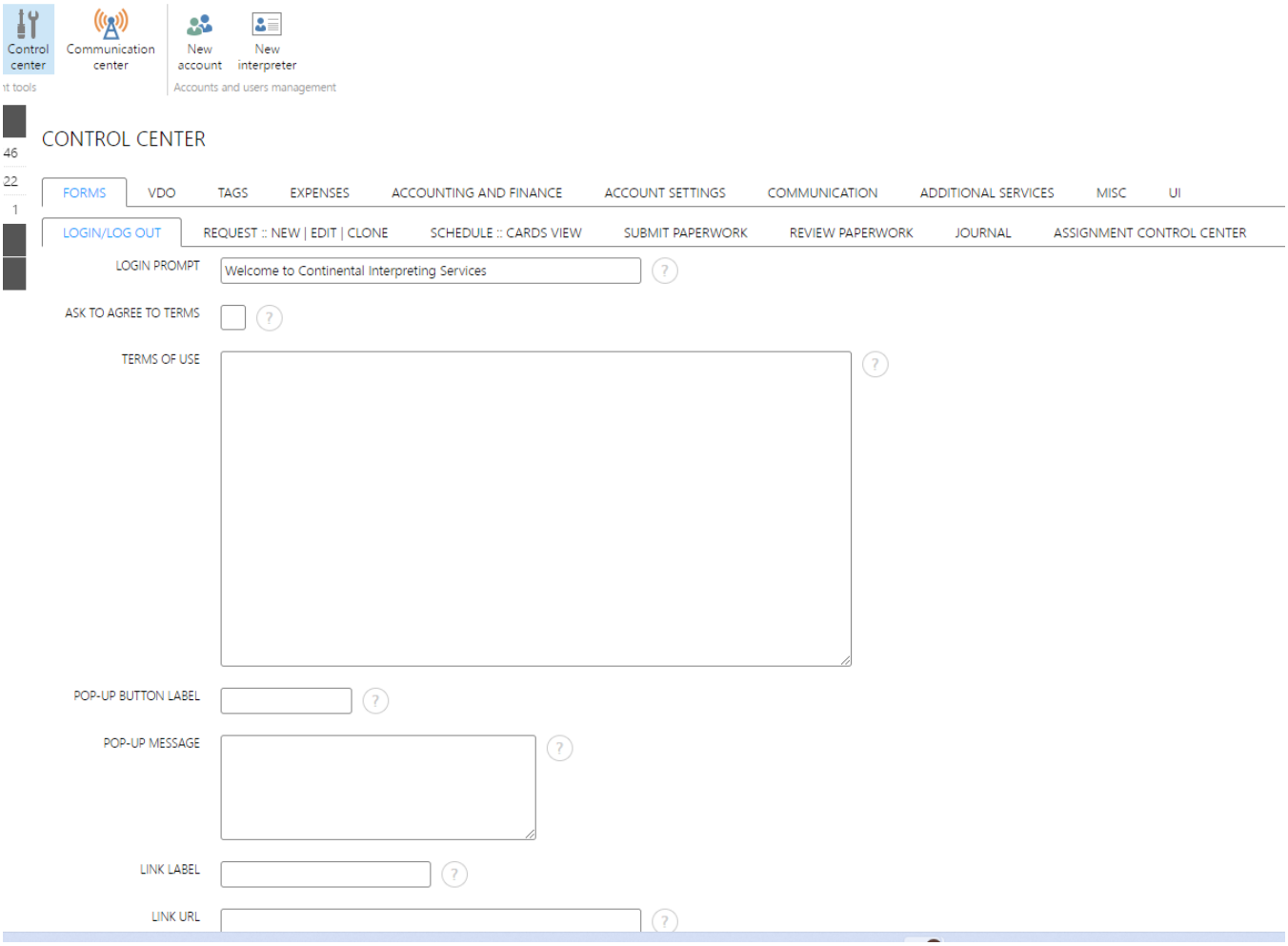
VENDOR'S SETTINGS ONLY

VENDOR PAPERPERWORK AS DIRECT LINK ☐

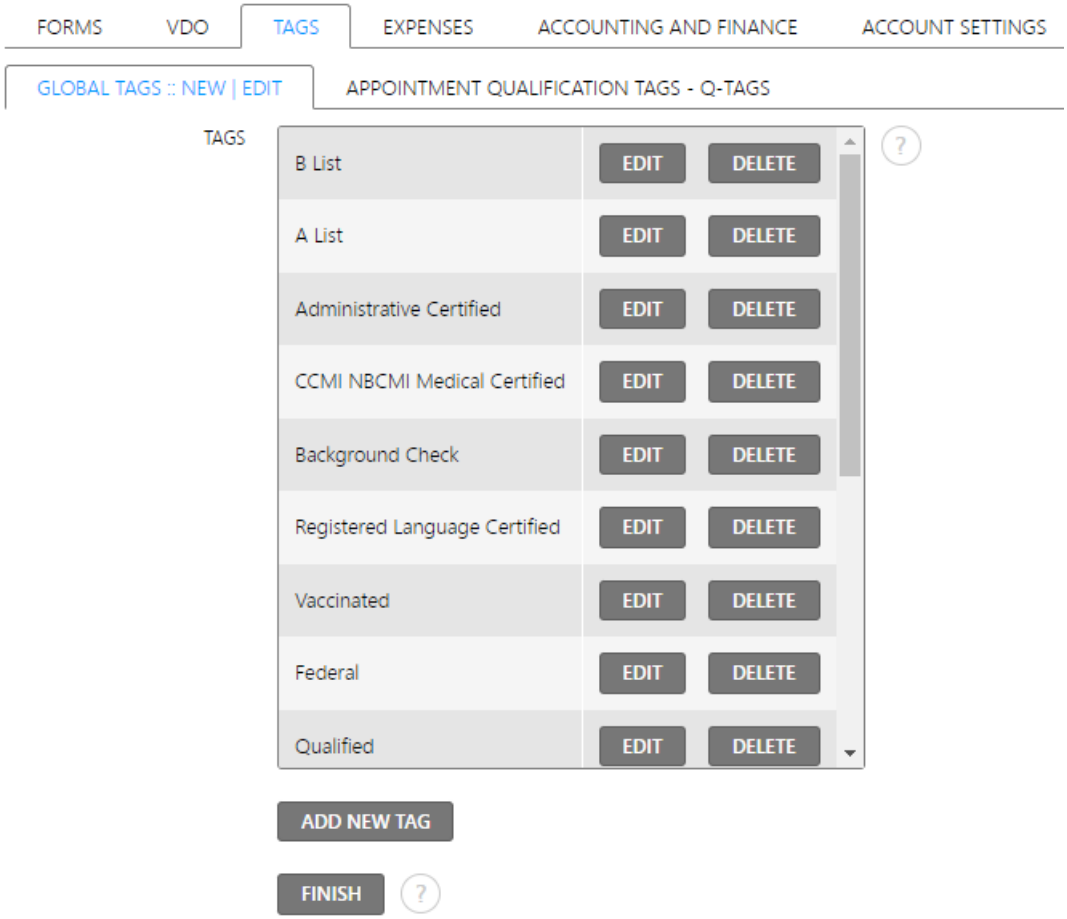
SHOW ALL OPEN APPOINTMENTS ☑

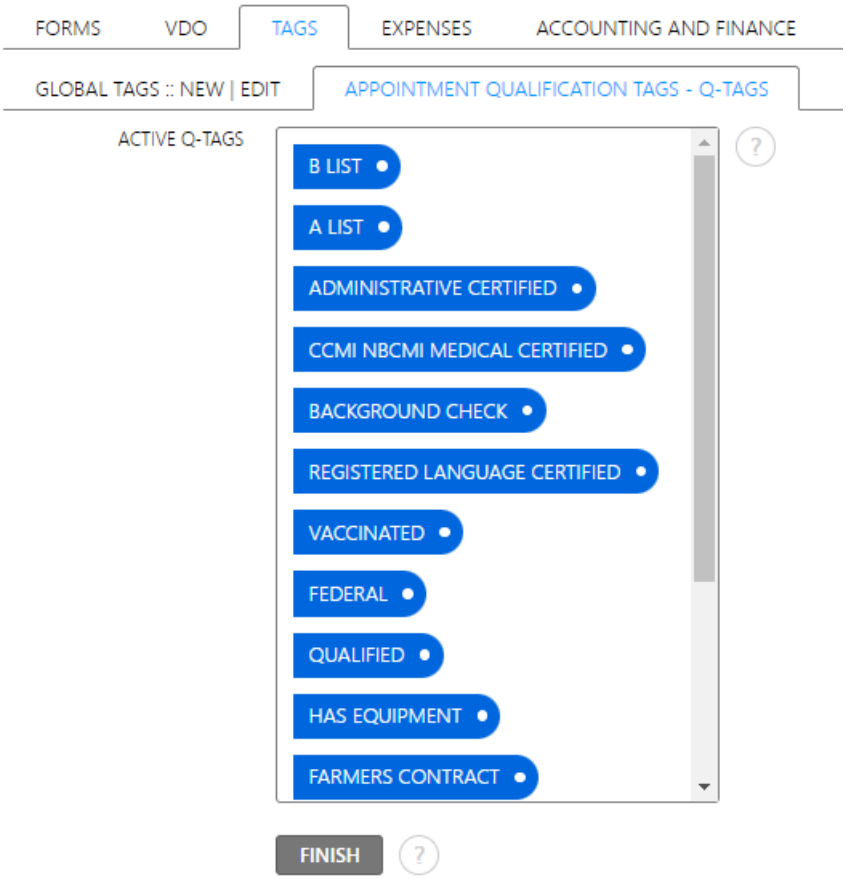
HIDE VENDOR CONTRACT/MEMO ☐

HIDE ACCOUNTING TAB ☐



Adding Tags Global & Appointment Q-Tags





System would not save properly, full document is in the FILE section of TEAMS - SI Training Chat

CONTROL CENTER

Forms > Login/Log Out

Text vendors/clients see when they log into SI portal

Forms > Request New | Edit | Clone

Schedule Cards View

Adding Tags Global & Appointment Q-Tags

Account Settings

Global Locations (where you add new locations)

Staff Members

Where you would add/edit/inactivate/internal staff members profiles

Be sure to apply correct employee settings and select "active" if it's a new employee

Assign appropriate calendar type

Note: In order to save the password you must select "set password" for "save changes" does not save password details.

Lists > Assignment Categories: (TERM: Assignment Categories = Calendar Type)

List > Assignment Class: (TERM: Assignment Class = Assignment Type | i.e., Deposition, Arbitration, etc.)

Note: each class needs to be connected to a category (each assignment type needs to be assigned to a calendar type, therefore you will have Deposition Spanish Legal, Deposition OOS, Deposition Exotic).

Consumer: (Term: Consumers = job title of the individual ordering the services – i.e. Attorney, Scheduler, Secretary)

Account Types: (i.e. Law Firm, Court Reporter Firm, School District, etc.)

Services: (TERM: Services=Languages)

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★Created Wed, Apr 6, 2022 1:14 AM by Veronica Amador
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