

CONTROL CENTER

Forms > Request New | Edit | Clone

CONTROL CENTER

FORMS

VDO

TAGS

EXPENSES

ACCOUNTING AND FINANCE

ACCOUNT SETTINGS

COMMUNICATION

ADDITIONAL SERVICES

MISC

UI

LOGIN/LOG OUT

REQUEST :: NEW | EDIT | CLONE

SCHEDULE :: CARDS VIEW

SUBMIT PAPERWORK

REVIEW PAPERWORK

JOURNAL

ASSIGNMENT CONTROL CENTER

SCHEDULED TIME INCREMENT FOR MINUTES

None

?

ESTIMATED TIME INCREMENT FOR HOURS

None

?

CUSTOM HOUR LIST

ESTIMATED TIME MAXIMUM HOURS

None

?

ESTIMATED TIME INCREMENT FOR MINUTES

None

?

OPI SCHEDULED TIME INCREMENT FOR MINUTES

Select increment

?

OPI ESTIMATED TIME INCREMENT FOR MINUTES

Select increment

?

VRI SCHEDULED TIME INCREMENT FOR MINUTES

Select increment

?

VRI ESTIMATED TIME INCREMENT FOR MINUTES

Select increment

?

ENABLE BROWSER AUTOCOMPLETE

☐

?

ENABLE NOTIFICATION ON CLONE

☐

?

BETA

ENABLE SERVICE ACCOUNT

☒

?

BETA

ENABLE EDIT OPTION FOR CUSTOMERS

☐

?

BETA

ENABLE EDIT PM NOTES FOR CUSTOMERS

☐

?

ACTIVATE DUPLICATE VERIFICATION

☒

?

ALLOW 0:00 ESTIMATED LENGTH

☐

?

PREVENT RUSH RATE MESSAGE

☐

?

ALLOW PM TO SEE REQUEST DETAILS

☒

?

INCLUDE DEFAULT PO IN ACCOUNT LIST

☐

?

INCLUDE ACCOUNT ID (IMPORT) IN ACCOUNT LIST

☐

?

ALLOW REQUESTER TO CHECK VOUCHER ID

☐

?

ALLOW REQUESTER TO UTILIZE Q-TAGS

☐

?

PREVENT EDITING AFTER REVIEW

☐

?

PREVENT EDITING AFTER VENDOR IS COMPENSATED

☐

?

PREVENT EDITING AFTER INVOICE IS ISSUED

☐

?

SHOW AS SOURCE LANGUAGE

Base languages only

?

SHOW AS TARGET LANGUAGE

Non-base languages

?

SUBSTITUTE LANGUAGES

☐

?

RESET CONFERENCE PLATFORM ON CLONE

☐

?

CONFERENCE PLATFORM LINK IS REQUIRED

☐

?

CONFERENCE PLATFORM DIAL-IN NUMBER IS REQUIRED

☐

?

CONFERENCE PLATFORM PIN OR PASSWORD IS REQUIRED

☐

?

RESET AVAILABILITY ON RESCHEDULE

☐

?

AUTOMATIC RUSH AND EMERGENCY RATES FOR PM

☐

?

REQUIRE CONFERENCE PLATFORM SELECTION

☐

?

PREVENT ADDRESS AUTO POPULATE

☒

?

HIDE CATEGORY IN CLASSIFICATION

☐

?

PREVENT RESTORE

☐

?

DESCRIPTION FIELD IS LOCKED

☐

?

DESCRIPTION FIELD DEFAULT CONTENT

LEGACY

ALLOW TO ATTACH ORDER FORM

☐

?

BETA

LIST SELF AS MANAGER

☐

?

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	<input type="checkbox"/> ?				SHOW VENDOR PAPERWORK TO REQUESTER	<input type="checkbox"/> ?	VENDOR AVAILABILITY RESET	None ▼	?	
USE ISO REPORT ON CANCEL	<input type="checkbox"/> ?				PREVENT CANCEL AFTER VENDOR IS COMPENSATED	<input type="checkbox"/> ?	SHOW VENDOR NAME WHEN CANCELLED	<input type="checkbox"/> ?		
SHOW UPCOMING APPOINTMENTS	<input checked="" type="checkbox"/> ?				PREVENT REQUESTER TO CANCEL	<input type="checkbox"/> ?	SHOW VENDOR RATES TO PM	<input type="checkbox"/> ?		
PREVIEW INVOICES AS HTML	<input type="checkbox"/> ?				PREVENT REQUESTER TO RESCHEDULE	<input type="checkbox"/> ?	SHOW FIND VENDOR TO PM	<input type="checkbox"/> ?		
LOCK NO VENDOR ASSIGNMENTS	<input type="checkbox"/> ?				HIDE VENDOR INVOICE WHEN CANCEL BILLABLE	<input type="checkbox"/> ?	BLOCK NO VENDOR	<input type="checkbox"/> ?		
VENDOR DOCUMENTS AS PDF	<input checked="" type="checkbox"/> ?				SHOW VENDOR INVOICE TO PM	<input type="checkbox"/> ?	HIDE NO VENDOR BUTTON	<input type="checkbox"/> ?		
SHOW MINIMUM BILLABLE	<input type="checkbox"/> ?				PREVENT PM TO CANCEL ASSIGNMENTS AFTER START TIME	<input type="checkbox"/> ?	SHOW RESPONSES FROM ALL VENDORS	<input type="checkbox"/> ?		
ACCOUNT LINE	Account :: sub account ▼ ?				PREVENT CUSTOMERS TO CANCEL ASSIGNMENTS AFTER START TIME	<input type="checkbox"/> ?	SHOW VENDOR CENTER TO PM	<input type="checkbox"/> ?		
					SHOW REVIEW CENTER IN CALENDAR	<input type="checkbox"/> ?	SHOW COMPLIANCE CENTER TO PM	<input type="checkbox"/> ?		
					SHOW MISSING PLATFORM LINK IN CALENDAR	<input type="checkbox"/> ?	ISOLATE SCHEDULE	<input type="checkbox"/> ?		
					SHOW MY SETTINGS IN SCHEDULE	<input type="checkbox"/> ?				

VENDOR'S SETTINGS ONLY

VENDOR PAPERPERWORK AS DIRECT LINK	<input type="checkbox"/> ?	HIDE VENDOR CONTRACT/MEMO	<input type="checkbox"/> ?
SHOW ALL OPEN APPOINTMENTS	<input checked="" type="checkbox"/> ?	HIDE ACCOUNTING TAB	<input type="checkbox"/> ?



it tools



Accounts and users management



New account



New interpreter

46

22

1

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FORMS

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UI

LOGIN/LOG OUT

REQUEST :: NEW | EDIT | CLONE

SCHEDULE :: CARDS VIEW

SUBMIT PAPERWORK

REVIEW PAPERWORK

JOURNAL

ASSIGNMENT CONTROL CENTER

LOGIN PROMPT

Welcome to Continental Interpreting Services

ASK TO AGREE TO TERMS

☐

TERMS OF USE

POP-UP BUTTON LABEL

POP-UP MESSAGE

LINK LABEL

LINK URL

Adding Tags Global & Appointment Q-Tags

TAGS

B List	EDIT	DELETE
A List	EDIT	DELETE
Administrative Certified	EDIT	DELETE
CCMI NBCMI Medical Certified	EDIT	DELETE
Background Check	EDIT	DELETE
Registered Language Certified	EDIT	DELETE
Vaccinated	EDIT	DELETE
Federal	EDIT	DELETE
Qualified	EDIT	DELETE

ADD NEW TAG

FINISH ?

FORMS VDO TAGS EXPENSES ACCOUNTING AND FINANCE

GLOBAL TAGS :: NEW | EDIT APPOINTMENT QUALIFICATION TAGS - Q-TAGS

ACTIVE Q-TAGS

B LIST •

A LIST •

ADMINISTRATIVE CERTIFIED •

CCMI NBCMI MEDICAL CERTIFIED •

BACKGROUND CHECK •

REGISTERED LANGUAGE CERTIFIED •

VACCINATED •

FEDERAL •

QUALIFIED •

HAS EQUIPMENT •

FARMERS CONTRACT •

FINISH ?

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)

🔄Revision #4

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