CONTROL CENTER

Forms > Request New | Edit | Clone

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

Setting		Setting		Setting	
USE JOURNAL ON CANCEL	☐ (?)	SHOW VENDOR PAPERWORK TO REQUESTER	☐ (?)	VENDOR AVAILABILITY RESET	None ▾ (?)
USE ISO REPORT ON CANCEL	☐ (?)	PREVENT CANCEL AFTER VENDOR IS COMPENSATED	☐ (?)	SHOW VENDOR NAME WHEN CANCELLED	☐ (?)
SHOW UPCOMING APPOINTMENTS	☑ (?)	PREVENT REQUESTER TO CANCEL	☐ (?)	SHOW VENDOR RATES TO PM	☐ (?)
PREVIEW INVOICES AS HTML	☐ (?)	PREVENT REQUESTER TO RESCHEDULE	☐ (?)	SHOW FIND VENDOR TO PM	☐ (?)
LOCK NO VENDOR ASSIGNMENTS	☐ (?)	HIDE VENDOR INVOICE WHEN CANCEL BILLABLE	☐ (?)	BLOCK NO VENDOR	☐ (?)
VENDOR DOCUMENTS AS PDF	☑ (?)	SHOW VENDOR INVOICE TO PM	☐ (?)	HIDE NO VENDOR BUTTON	☐ (?)
SHOW MINIMUM BILLABLE	☐ (?)	PREVENT PM TO CANCEL ASSIGNMENTS AFTER START TIME	☐ (?)	SHOW RESPONSES FROM ALL VENDORS	☐ (?)
ACCOUNT LINE	Account :: sub account ▾ (?)	PREVENT CUSTOMERS TO CANCEL ASSIGNMENTS AFTER START TIME	☐ (?)	SHOW VENDOR CENTER TO PM	☐ (?)
		SHOW REVIEW CENTER IN CALENDAR	☐ (?)	SHOW COMPLIANCE CENTER TO PM	☐ (?)
		SHOW MISSING PLATFORM LINK IN CALENDAR	☐ (?)	ISOLATE SCHEDULE	☐ (?)
		SHOW MY SETTINGS IN SCHEDULE	☐ (?)		

VENDOR'S SETTINGS ONLY

Setting		Setting	
VENDOR PAPERPERWORK AS DIRECT LINK	☐ (?)	HIDE VENDOR CONTRACT/MEMO	☐ (?)
SHOW ALL OPEN APPOINTMENTS	☑ (?)	HIDE ACCOUNTING TAB	☐ (?)

Control
center

Communication
center

New
account

New
interpreter

n tools

Accounts and users management

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

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

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

==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)