

Dashboard

Dashboard in Calendar view is the first screen you will see upon login. Most of the functions you'll need are available directly from here:

- Get a bird's eye view of appointments calendar for your company for a month, week, or day at a time. Jobs are color-coded by Status, the color legend can be found at the top left of the calendar.
- Need to see the jobs at a particular address only? Use the location filters right above the calendar. Your agency may set a default location for you, in which case you will automatically see only appointments for that location when you first log in, and you can make further adjustments via the 'Currently Viewing Bookings For' filters.
- Hover over a specific job to see a pop-up with more job details.
- Click on a job for a menu of available actions. You can do a lot, check it out!
- Click on Daily Bookings Log to print or save a day's log of jobs for a given date. Use it as a sign-in sheet for interpreters or a reference point for your front desk staff.
- Search for a specific job by its number in the Job Search box at the top of the page.
- If your agency posted a message for you, you'll see it right at the top of the Dashboard under Messages and Alerts.
- Click the big blue Create New Booking button to enter a new request.

The screenshot displays the dashboard for St. Marys Medical Center (432). At the top right, contact information is provided: Toll Free: 1 (877) 123-1234, Fax: 1 (888) 123-1234, and Email: sales@demoagency.com. Below this is a 'Messages & Alerts' section with a message dated 08/01/16: 'Welcome to Interpreter Intelligence. Timesheets due weekly! : We are excited to be in partnership with Interpreter Intelligence to provide the technology solution for our interpreting needs.' Navigation buttons for 'Prev' and 'Next' are present. The main interface features a 'Create New Booking' button (with a star icon) and a 'Daily Bookings Log' button. Below these are filters for 'Currently Viewing Bookings For' (set to St. Marys Medical Center (432) with a refresh icon), 'All Clients', and 'All Locations'. There are also buttons for 'Export to Calendar' and 'Jump to Date'. The calendar view is set to 'October 2016' and shows a grid of dates from 25 to 31. Jobs are listed in colored bars across the days: Sun 25 (10a #673971 - Front Desk), Mon 26 (1:00p #619100 - Outpatients), Tue 27 (10:30a #618609 - Front Desk), Wed 28 (10a #618723 - Front Desk), Thu 29 (7a #671289 - Front Desk, 10a #677642 - Front Desk), Fri 30 (10a #665681 - Front Desk), Sat 31 (10a #671289 - Front Desk). The next row shows jobs for Sun 2 (1:00p #619106 - Outpatients), Mon 3 (10:30a #618614 - Front Desk), Tue 4 (10a #618724 - Front Desk), Wed 5 (7a #671567 - Front Desk), Thu 6 (1:00p #619110 - Outpatients).

- If you'd rather see the data in a grid vs. a calendar, switch to **Tabular View** (see screenshot below). This is where you can also **filter** jobs by criteria. Most commonly used columns are included by default, but you can customize your search by adding fields from **Reset Default Columns** list.
- If you prefer working with the **Tabular View**, the job actions can be accessed from the drop-down menu to the left of each job record.

★ Create New Booking Daily Bookings Log Calendar View **Tabular View**

Currently Viewing Bookings For: Refresh

St. Marys Medical Center (432) [All Clients] [All Locations]

ID	Date	Time	Location	Filter	Language	Stat.	Interpreter
618740	01/25/17	10:00 AM	Front Desk, St. Cecilia's Ward, 555 Clayton Street,, San Francisco,, CA 94117	spa	Spanish	CLS	Sonja M Garcia (2538) (...)
	01/18/17	10:00 AM	Front Desk, St. Cecilia's Ward, 555 Clayton Street,, San Francisco,, CA 94117	spa	Spanish	UNF	
	01/11/17	10:00 AM	Front Desk, St. Cecilia's Ward, 555 Clayton Street,, San Francisco,, CA 94117	spa	Spanish	OPD	

Jobs Reset Columns

Job Actions: View More, View (in full), Edit (in full), VoS Form, add VoS, eSignature

Entering a New Interpreter Request

You can enter a new request by clicking the blue **Create New Booking** button or going to Home – Bookings – Create New menu option. The tips below will help you navigate the form.

- Start with the **Client** at the top, fill in the value and hit Tab to move to the next field.
- **Client** will be the name of your company or a division within the company as defined by

your agency. You may have multiple Clients available. Once you select a **Client**, the **Customer** value will auto-populate as set up by your agency. **Customer** is the name of your company and will be the only option for that field.

- **Required** fields are marked with red asterisks, make sure to fill those in, the rest are optional, so they can be left blank.
- **Location** refers to the actual address where the appointment will take place.
- **Note: Client, Customer, and Location** fields already have values pre-populated by

your agency. You will need to select a value out of the available options. If enabled by your agency, you may also be able to add new values for these fields when entering a new request.

- To select from **Client** or **Location** list (fields with the drop-down icon ) , **start typing** in the field to see matching options or click on the **drop-down** icon to make your selection from the entire list.
- If no matching record is found in the existing list, click the **New** button that looks like a pencil () to add and save a new record (if enabled).
- **Note:** If a matching record exists but needs to be edited, first select the value from the drop-down so that it populates in the field, then click the **pencil button to Edit**, which will bring up the screen with current record details, edit the record and click **Save**.
- If you selected an incorrect value, click the **Clear** button () to reset the field.
- If you are not sure what the field is asking for, hover over the **question mark** (

some help on the specific field.

- Don't forget to hit **Save** at the end of the page when you are done!

Additional Booking Options

- Once you enter and Save a new job, you can easily add recurring or follow-up appointments without having to re-enter all the data. If enabled by your agency, updating and cancelling a job will also be available.

Creating a Duplicate Appointment

- To save time on appointment entry and use some data from an existing job, you can also use the Duplicate command. A new job created as a result will **not** belong to the same booking as the original, and you can modify any fields (such as language, service location, etc.) without affecting the original appointment.
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