Welcome to GL Live Booking

As the global marketplace expands across cultural and linguistic barriers, GL Live Booking can help you ensure quality in every phase of scheduling professional interpretation services. Whether you need services or provide them you can easily create, monitor, and manage appointments in GL Live Booking .

You can get the fast turnaround times you need:

Efficiently schedule your appointments

Choose what you need from the list of interpretation service types, including:

- Consecutive Interpretation
- Court Interpretation
- Simultaneous Interpretation
- Over the Phone Interpretation
- Documents Review
- Sight Translation

Use the at-a-glance view to quickly find the most suitable candidates for an appointment based on:

- Location
- Subject matter expertise
- Availability

Collaborate in real-time

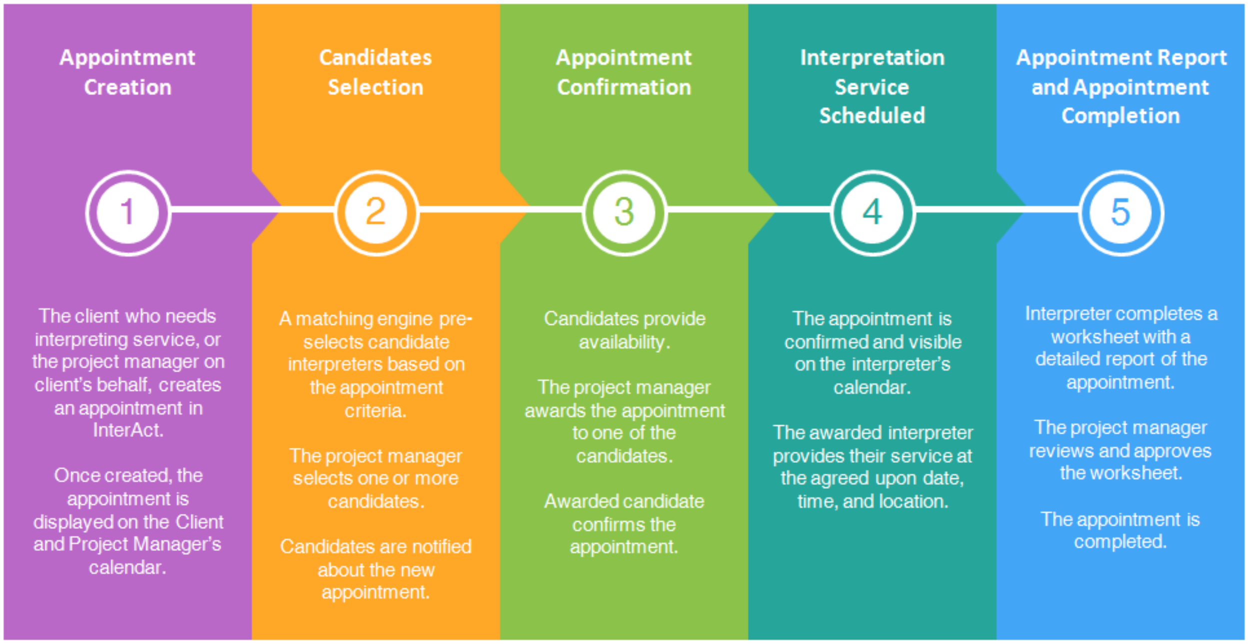
- You can communicate with all involved parties in one place
- You'll see email notifications and status updates so you don't miss any deadlines
- Exchange comments and documents quickly and always have a copy in GL Live Booking
- Access GL Live Booking anytime, anywhere from a browser

Improve your process

- You can access tools in GL Live Booking to monitor appointments and create reports

Understand the workflow

As a scheduler, you'll use the same basic process to schedule an appointment. If you're providing services, you can see where you'll be added in to the process.



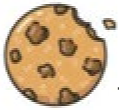
Access GL Live Booking

You can access GL Live Booking whenever you need to and wherever you are since the software and all your data is provided securely in the cloud. To access GL Live Booking you need a browser and the link to GL Live Booking . Then to sign in use the email address and a password associated with your GL Live Booking user account.

You may receive your account information either from the Vendor Management team in email or from a TransPerfect representative that allows you to sign yourself up for an account. If you forget your password, you can reset that yourself from the Sign In screen.

Sign in to GL Live Booking

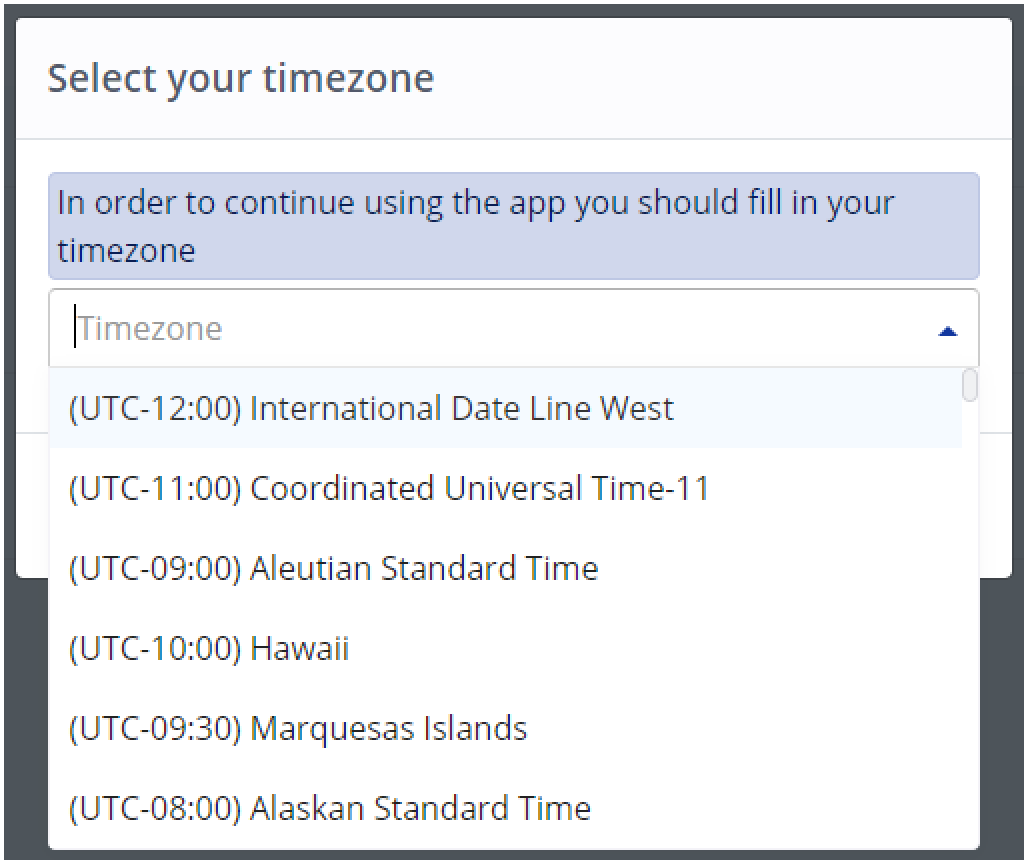
Have your user name, password, and the GL Live Booking URL ready before you sign in to GL Live Booking . If you haven't received your sign in credentials, contact your GL Live Booking representative.

 TransPerfect uses cookies to personalize your GlobalLink journey and to gain insights into your experience. When you visit a GlobalLink application, we may store or retrieve data in your browser. This storage is often necessary for the basic functionality of the application.
Privacy is important to us, so you have the option of disabling certain types of storage that may not be necessary for the basic functioning of the website. Blocking categories may impact your experience. For more detailed information about the cookies we use, please see our Privacy Policies.

To sign in to GL Live Booking :

1. Using a supported browser, go to the GL Live Booking URL.
2. You may see a **Cookies Consent** page. **Required Cookies** are selected by default. Optionally, to allow TransPerfect to collect other types of data, you can select additional options.
3. Click **Submit**.
4. On the **Sign In** or **Sign Up** screen, click **Sign In**.
5. On the sign in screen, enter your email address and password.
6. Optionally, to have GL Live Booking remember your credentials the next time you sign in, select **Remember Me**.
7. Click **Sign In**.

    The first time you sign in to GL Live Booking you are prompted to specify the timezone you work in. This allows GL Live Booking to display appointment times correctly for where you live and work.



Reset a forgotten password

If you don't remember your password, you can reset it yourself from the Sign In screen.

You only need to know your user name or the email address associated with your GL Live Booking account. GL Live Booking will send you an email with a link to reset your password.

When you create a new password for your account you must use at least 8 characters and no more than 25. You must also use at least:

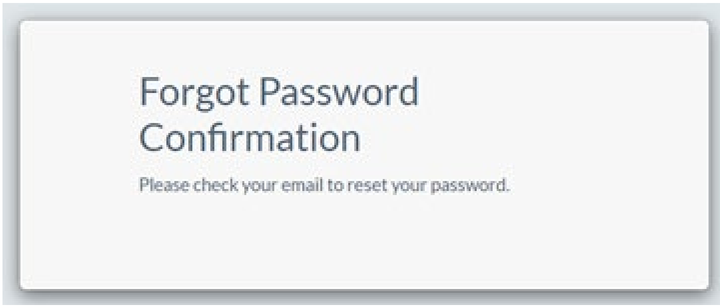
- One lowercase letter (a-z)
- One uppercase letter (A-Z)
- One number (0-9)
- One special symbol (!@$?)

To reset your password:

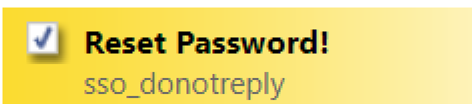
1. Using a supported browser, go to the GL Live Booking URL.
2. On the **Sign In or Sign Up** screen, click **Sign In**.
3. On the sign in screen, click **Forgot Password?**

4. In **User Name / Email**, enter the credentials associated with your GL Live Booking account, then click **Submit**.

   You'll see a confirmation that an email has been sent to reset your password.

5. Check your email Inbox for an email from **sso_donotreply** called **Reset Password!**

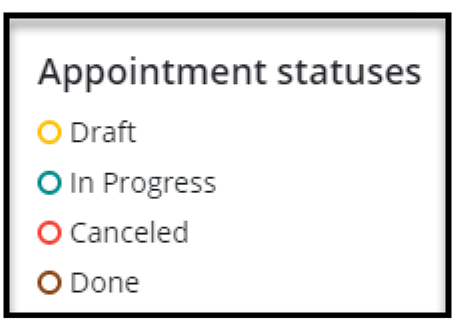
   

6. To reset your password, click the link inside your email or paste it into a browser window.

Understand client appointment status

After you create an appointment, it starts out with a state of **In Progress** until you meet the requirements for the next stage of scheduling. The appointment moves through various stages as vendors are assigned, quotes are submitted, the appointment date arrives, and the work is completed. You can edit appointment settings in any state except for **Canceled** or **Done**.

Appointments cycle through the following stages as you work with them:



In the following list, the actions you can take when an appointment has a specific status are marked with the following icons:

This is a requirement for a status

This step is done by a Transperfect project manager

This step can be done by you, as an client account holder

This is a requirement to move the appointment to the next stage

Draft

An appointment was created with all the required information but it wasn't submitted by:

- A project manager
- You, as an client account holder, can
  - Create an onsite draft client appointment
  - Create an remote draft client appointment

A project manager can invite vendors to an appointment now or later.

A project manager can submit a quote now or later.

The appointment needs to be submitted by:

- A project manager
- You, as an client account holder, can Submit a draft client appointment.

In Progress

The appointment was created.

- A project manager can create the appointment and move it to In Progress.
- You, as an client account holder, can Create client appointments and they start with this status

A project manager needs to assign a vendor.

A project manager needs to add a draft quote.

The quote needs to be approved by:

- A Transperfect project manager
- You, as an client account holder, can Approve a quote for a client appointment

The appointment needs to be scheduled by:

- A Transperfect project manager
- You, as an client account holder can [Schedule a client appointment]

➡ The appointment date needs to pass.

Cancelled

✓ The appointment was created.

➡ The appointment needs to be canceled by:

- A project manager
- You, as an client account holder, can [Cancel a client appointment]

Done

✓ The appointment was created.

✓ The appointment was submitted.

A project manager did assign a vendor.

A project manager did submit a draft quote.

✓ The quote was approved.

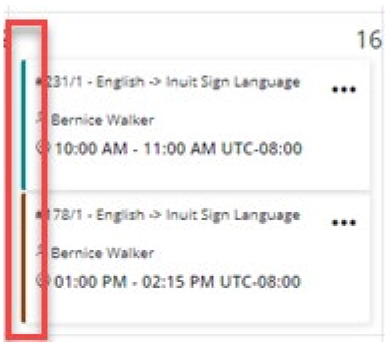
✓ The appointment was scheduled.

✓ The appointment date has passed.

A project manager approved a vendor's timesheet.

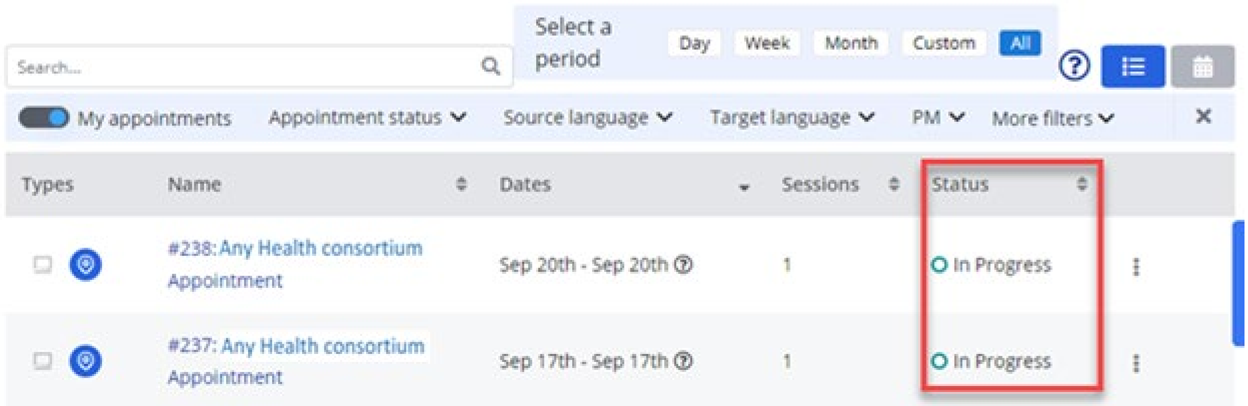
You can see the state of an appointment in the following places:

- The **Schedule** screen on the **Calendar** view



Look at the color of the sidebar for the status. To see a color key, click the question mark.

- The **Schedule** screen on the Table view

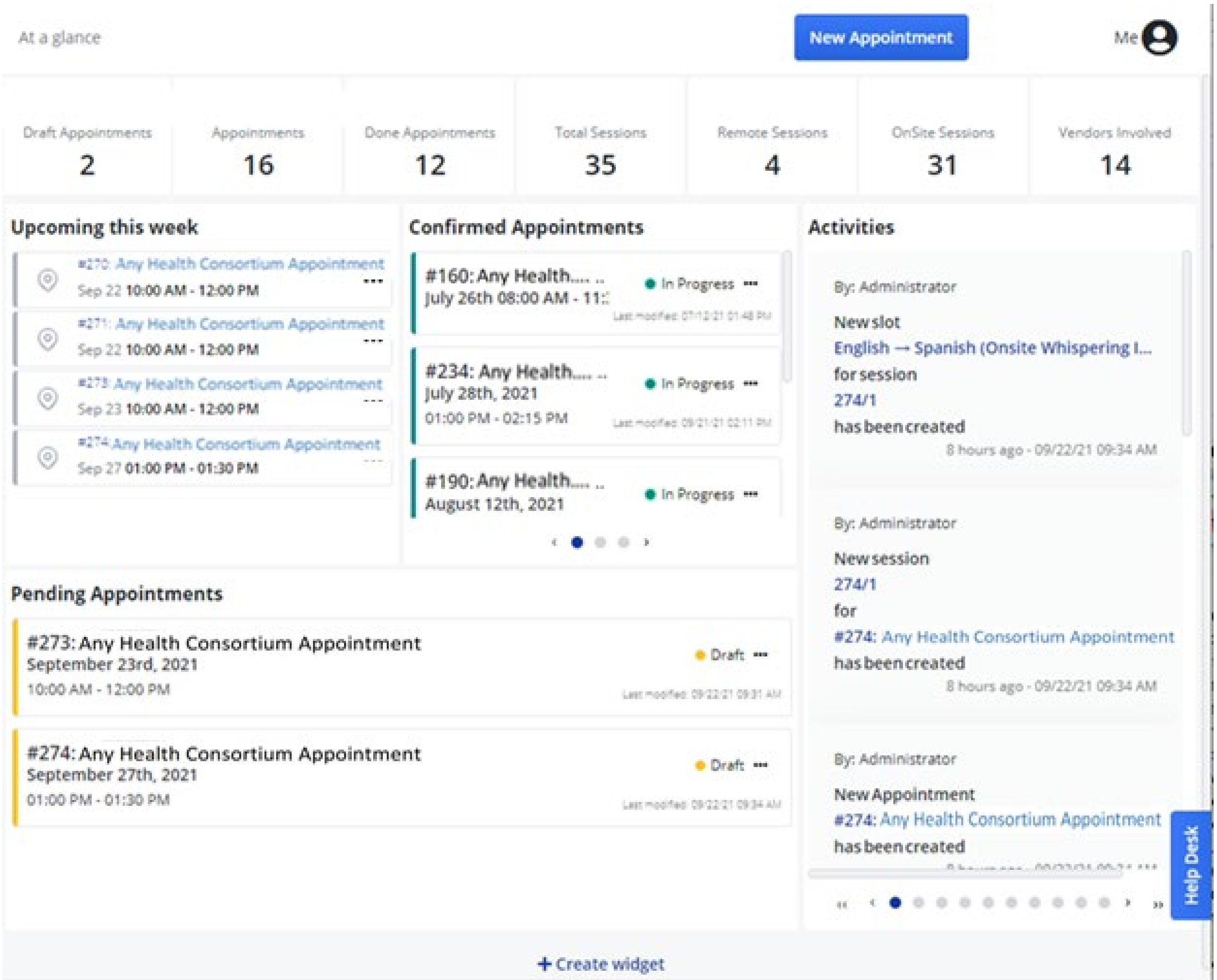


- An appointment you open

Look at the top of the screen.

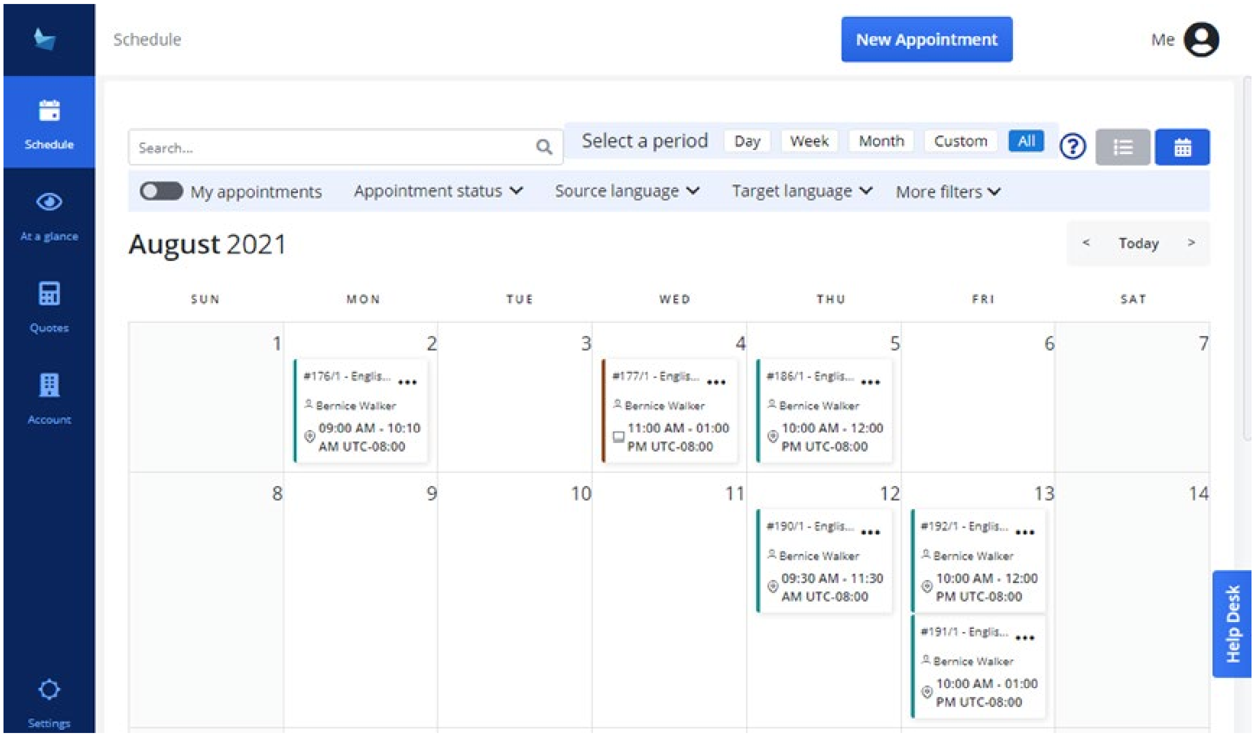
See everything about your account at-a-glance

You can create your own dashboard and decide what information about your client appointments is most important for you to see. GL Live Booking displays a default dashboard when you select the **At a glance** option. The widgets on the default dashboard provide statistics, dates, and events about all appointments scheduled for your client account. You can remove the default widgets, edit what they show you, move or resize them. You can also create new widgets.



Use the client calendar

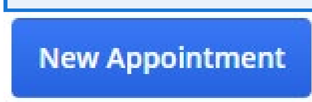
When you sign in to GL Live Booking , the first screen you see is your schedule. You can quickly see all appointments for the current month.



Create client appointments

As a client you can request that an interpreter attend your meetings. The first step is to create an appointment. You can schedule the appointment as an in-person meeting (on-site) or as a virtual meeting (remote). Then a TransPerfect project manager will find available interpreters for you. Appointments can be scheduled for a single session or span over multiple sessions depending on the client's needs. If you prefer, you can also have a project manager schedule appointments for you.

> If you have existing appointments that use all the same settings except for the date, you can use those appointments to easily create new ones in the following ways:
>
> - [Use previous settings to create a client appointment]
> - [Duplicate a previous client appointment]

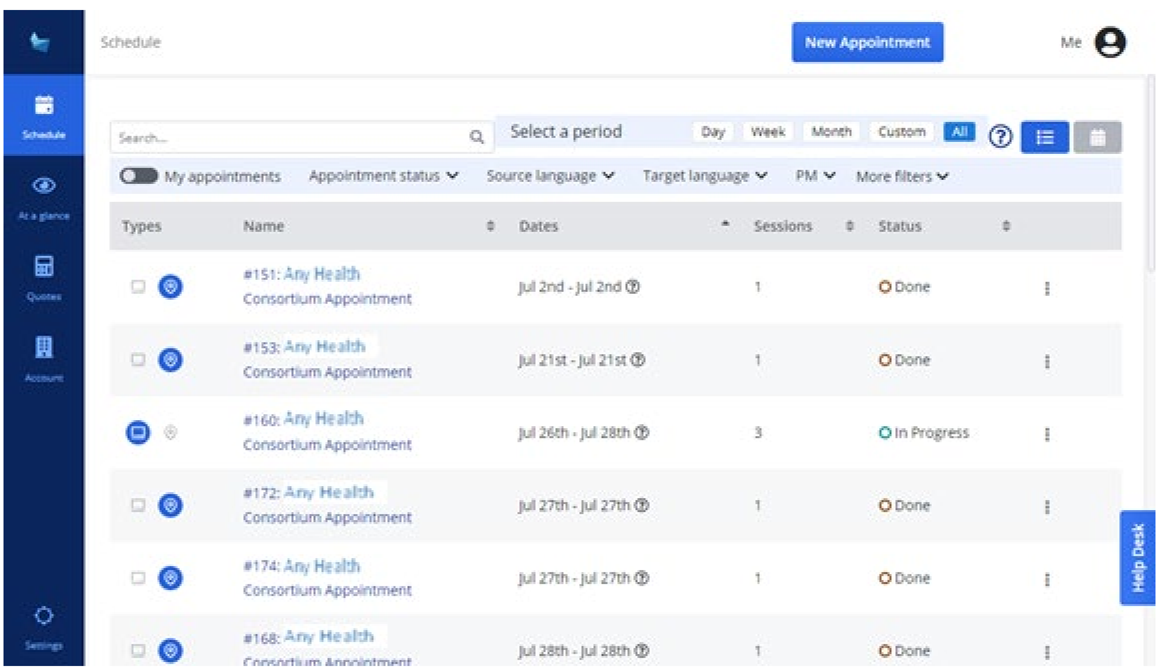


You can create an appointment from any screen in GL Live Booking using the **New Appointment** button in the top right corner.

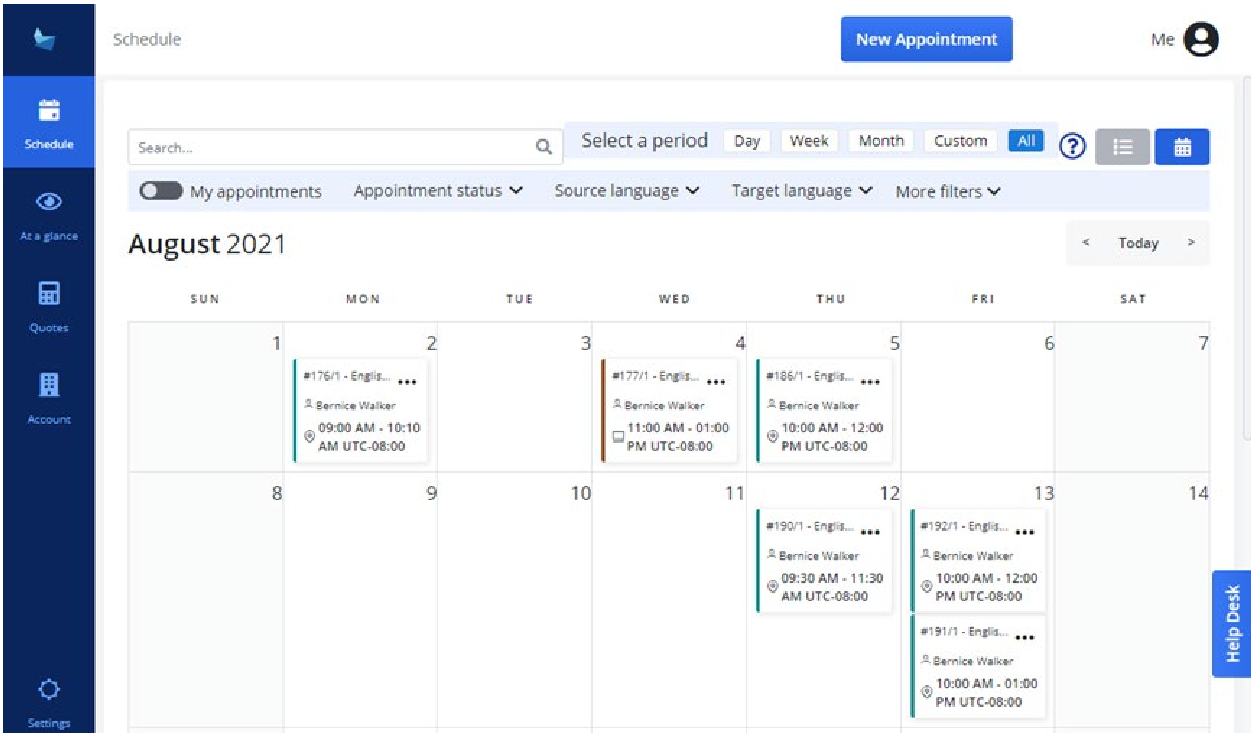
After you create an appointment, you can find it on the **Schedule** page, accessible from the menu on the left side of the screen.

You can view appointments as either:

A list formatted like a table



A calendar view



> Filters are shown in the light-blue ribbon at the top of the page. You can change which appointments you see in the list and calendar views by using filters. To learn more about configuring the list of appointments, follow the steps in Use filters on the client appointment list.

Create an onsite client appointment

As a client, you can request that an interpreter attend your meeting in person by creating an onsite appointment. Appointments can be scheduled for a single session or span over multiple sessions. After you create the appointment, you can add more sessions if necessary. If you prefer, you can have a TransPerfect project manager create the appointment for you.

Create appointment ×

09/15/21 @ 10:00 AM (UTC-08:00)

Wednesday

Custom Duration

2 : 00

All day

Frequently Used Settings

Remote

OnSite

Choose client department

TBC

Choose your location *

Map Form

Service Type *

Subject matter *

Source Language

English ×

Target Language

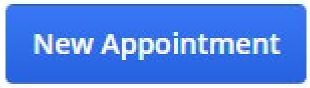
Spanish ×

Additional Info

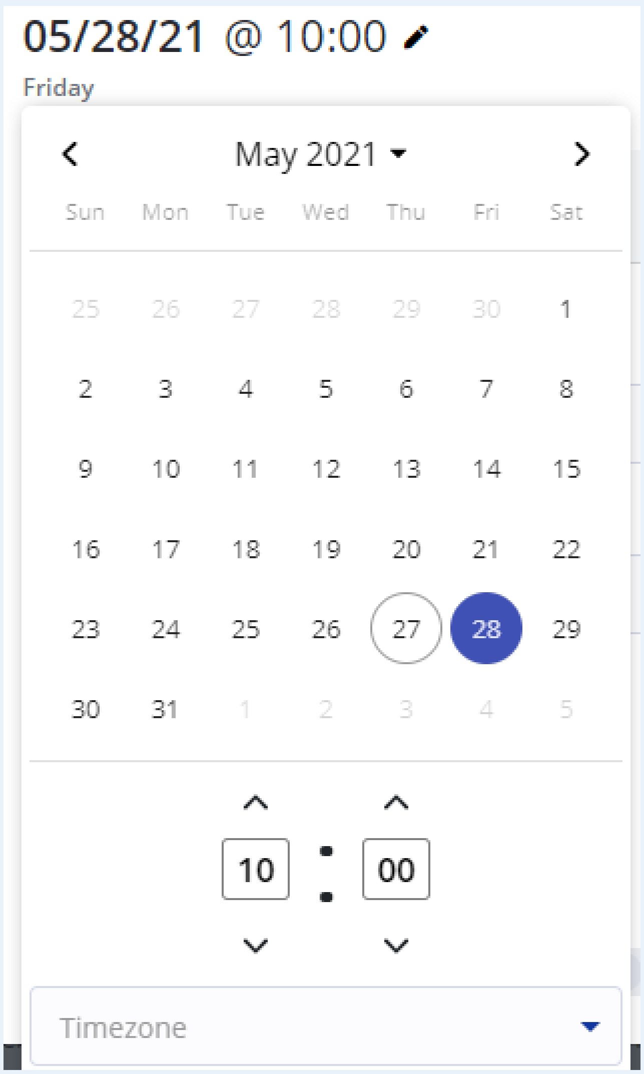
Notes

Multiple Sessions Cancel Submit

To schedule an onsite appointment:

1. On the top right side of the screen, click the **New Appointment** button 

.
2. By default, the appointment is scheduled for the next day at 10 AM. To change this, next to the date and time, click the pencil icon .
3. On the date picker, in the calendar, select today's date or any later date.



The current day is circled in grey, and the day you've chosen has a purple circle around it.

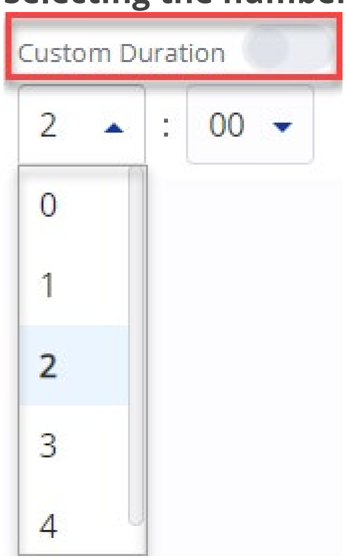
4. In the clock listed below the calendar, use the arrow keys to set the time when the meeting starts.

> If there's no **AM** or **PM** box after the time, you're using a 24-hour time format:
>
> - To set a time in the morning (AM), use a number between 0 - 12.
> - To set a time in the afternoon or evening (PM), use a number between 13 - 23.
>
> To learn about time formats, read [Set date and time formats](#).

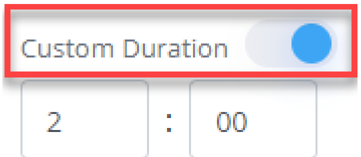
5. Select a **Timezone** where the meeting is taking place.

   GL Live Booking saves the settings and closes the date picker for you.

6. On the **Create Appointment** dialog, by default, the appointment is scheduled to last for two hours. To change this, in **Session Duration**, do any of the following:
   - **Selecting the number of hours and minutes.**

     a. Make sure the **Custom Duration** option is OFF, with a grey circle on the left. If it isn't, click the left side of the toggle.
     b. In the first field, use the drop-down arrow to set the number of hours.
     c. In the second field, use the drop-down arrow to set the number of minutes.
   - **Entering your own values for hours and minutes.**



a. Turn **Custom Duration** ON (with a blue circle on the right), by clicking the right side of the toggle.
b. In the first field, enter the number of hours.
c. In the second field, enter the number of minutes.

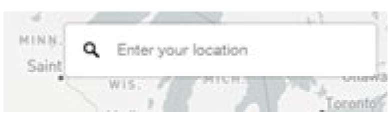
- If the appointment lasts for 8 hours or more, selecting **All day.**

7. Optionally, if you want to automatically fill out the rest of the form using settings from previous appointments go to: [Use previous settings to create an appointment].

 If you're going to the topic linked in step 7, you don't need to complete the remaining steps in this topic .

8. To let attendees know they must travel to an in-person appointment click **Onsite**.
9. To **Choose your location** from the **Map**, make sure the toggle is set to map (

), and then do one of the following:
   - If you don't know the address yet, select the **TBC** (To Be Chosen) option.
   - If you know the address, in the search box, enter part or all of the address. From the search results, select the correct location.

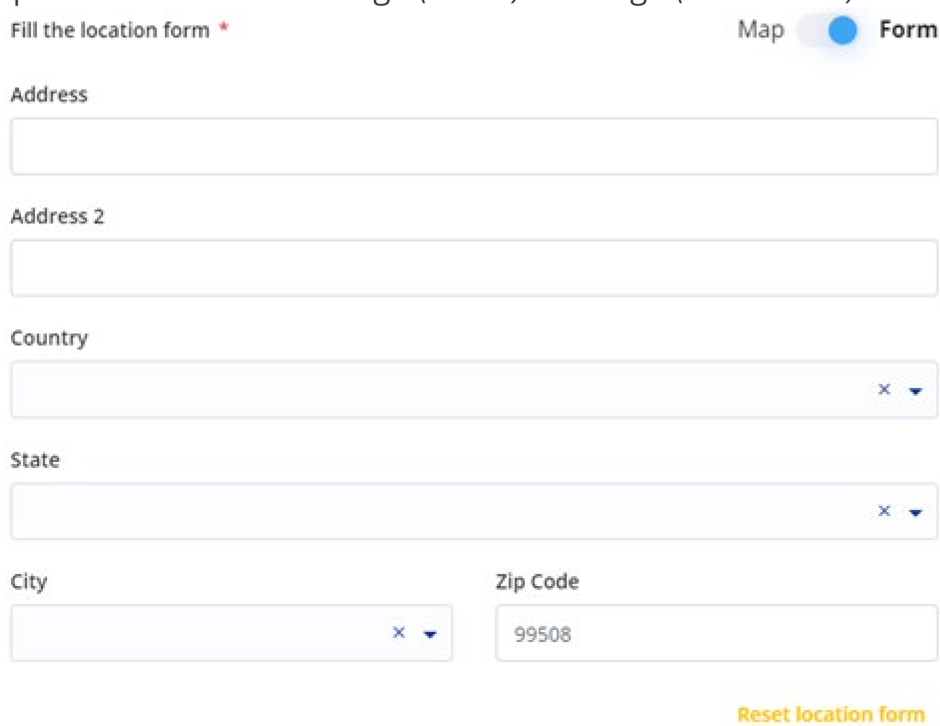
   

10. To **Choose your location** by entering text in a **Form**, make sure the toggle is set to form (

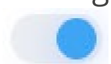
), and then do the following:
    1. If you don't know the address yet, select the **TBC** (To Be Chosen) option.
    2. If you know the address, complete the following fields:

       1. In **Address**, enter the building number and street address. If you need to specify an apartment or suite number, enter that in **Address 2**.

2. If the meeting isn't located in the United States, select the **Country**.
3. Select the **State** by scrolling through the list or typing the first few letters to find your state quickly.
4. Select the **City** by scrolling through the list or typing the first few letters to find your city quickly.
5. In **Zip Code**, if your business is located in the United States, enter a zip code in either the 5-digit *(XXXXX)* or 9-digit *(XXXXX-XXXX)* format.



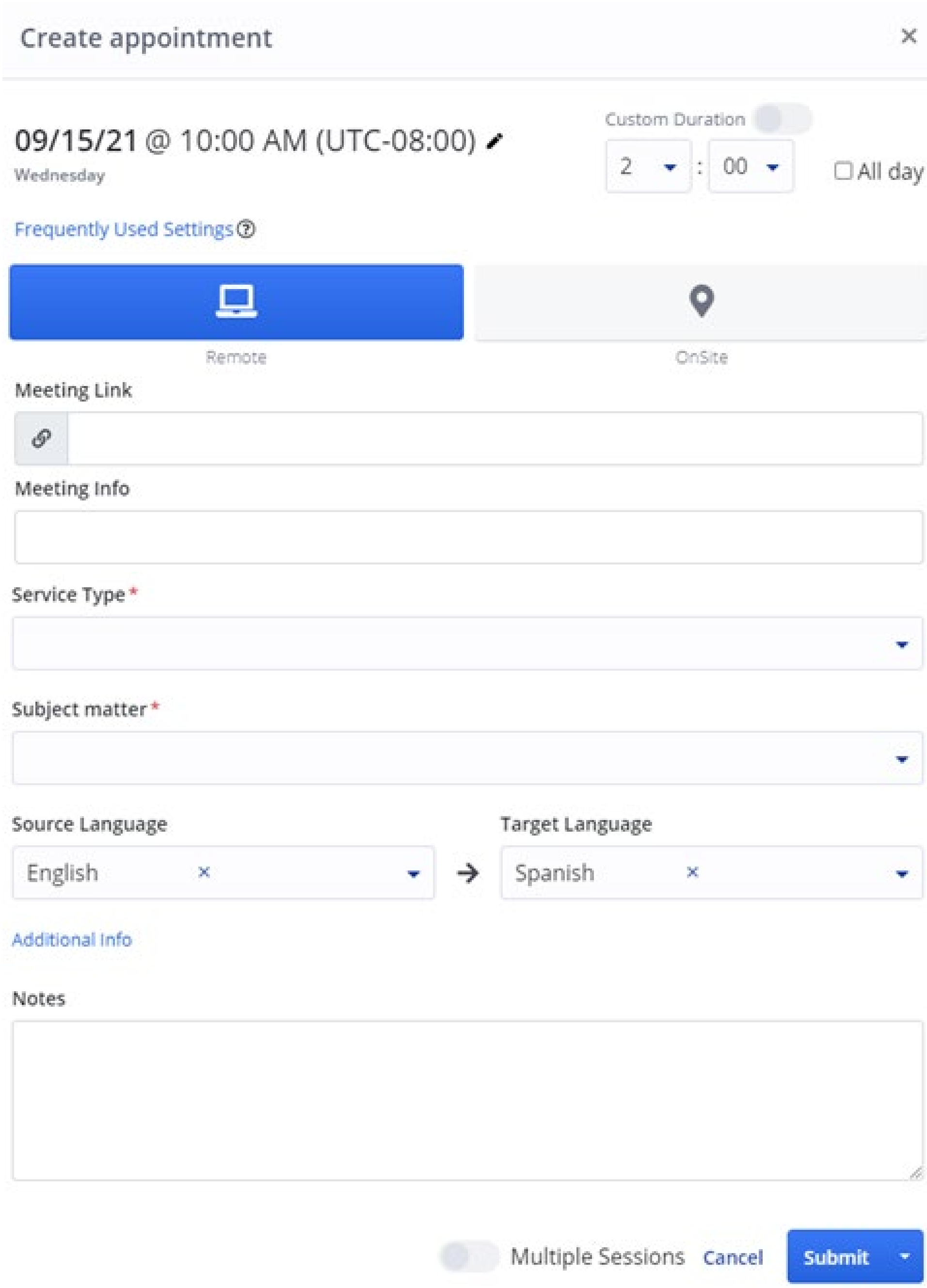
11. In **Service Type**, select the job you need the vendor to do, such as copywriter, language lead, simultaneous interpretation, sight translation, transcriptionist, and so on.
12. In **Subject Matter**, select the field that a vendor should have qualifications for or competencies in, such as legal or medical subjects.
13. In **Source Language**, select the language that will be spoken at the appointment that you need translated.
14. In **Target Language**, select the language that you want the interpreter to translate the Source Language into.
15. Optionally, if you want to add any of the following details, click **Additional Info**.
    0. **More than one interpreter** — In **Interpreters**, click the **+** plus sign to increase the minimum of 1.
    1. **An interpreter of a specific gender** — In **Preferred Gender Type**, change **No preference** to **Female** or **Male**.

    2. **Specific certification is required** — Click **Require compliances**. In the **Requirements** field that appears, select the area that the interpreter must be certified in to help the client.
16. Optionally, if you need to specify more than one source and target language, click +**Add another language**.
    0. In **Source Language**, select the language that will be spoken at the appointment that you need translated.
    1. In **Target Language**, select the language that you want the interpreter to translate the Source Language into.
    2. In **Interpreters**, click the **+** plus sign to increase the minimum of 1.
    3. In **Preferred Gender Type**, change **No preference** to **Female** or **Male**.
17. If there is more information that you need to provide, in **Notes**, enter any additional instructions or comments.
18. If you want to mark this appointment as needing **Multiple Sessions**, click the right side of the toggle to set it to Yes .
19. To save and create the appointment, do one of the following:
    - If you didn't select **Multiple Sessions**, click **Submit.**
    - If you did select **Multiple Sessions**, click **Next**. The appointment is saved and will open in a new screen. You can add more sessions on the new screen at any time.
20. If you clicked **Submit**, to open the appointment, do one of the following:
    - At the top of the screen you'll see a notification that the appointment was successfully created. Click the notification to open the appointment.

    - On the left side menu, select **Schedule**. Find the appointment you just created. To open it, click the name.

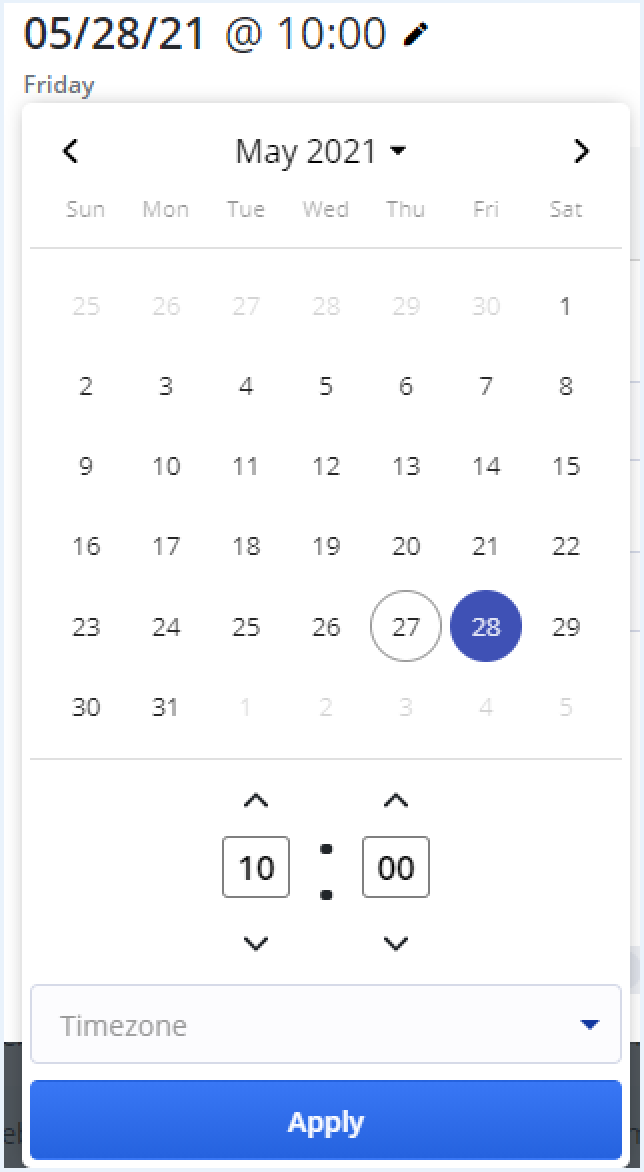
Create a remote client appointment

As a client, you can request that an interpreter log in to a virtual meeting to provide their services by creating a remote appointment. Appointments can be scheduled for a single session or span over multiple sessions. After you create the appointment, you can add more sessions if necessary. If you prefer, you can have a TransPerfect project manager create the appointment for you.



To schedule a remote client appointment:

1. On the top right side of the screen, click the **New Appointment** button.
2. By default, the appointment is scheduled for the next day at 10 AM. To change this, next to the date and time, click the pencil icon .
3. On the date picker, in the calendar, select today's date or any later date.



The current day is circled in grey, and the day you've chosen has a purple circle around it.

4. In the clock listed below the calendar, use the arrow keys to set the time when the deposition starts.

> If you're using a 24-hour time format:
>
> - To set a time in the morning (AM), use a number between 0 - 12.

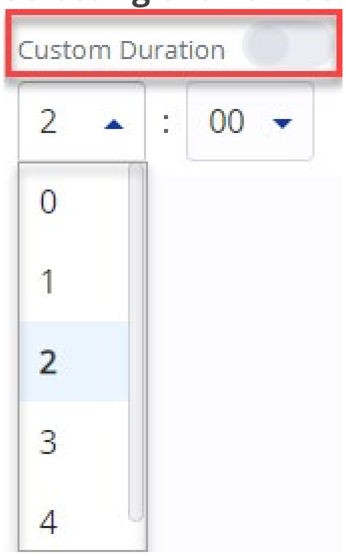
- To set a time in the afternoon or evening (PM), use a number between 13 - 23.

To learn about time formats, read Set Date and Time formats.

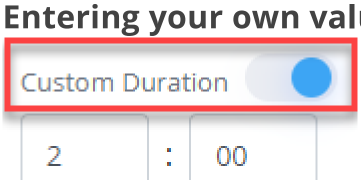
5. Select a **Timezone** where the meeting is taking place.

   GL Live Booking saves the settings and closes the date picker for you.

6. To let attendees know how long the appointment lasts, in **Session Duration**, do any of the following:
   - **Selecting the number of hours and minutes.**

     a. Make sure the **Custom Duration** option is OFF, with a grey circle on the left. If it isn't, click the left side of the toggle.
     b. In the first field, use the drop-down arrow ▾ to set the number of hours.
     c. In the second field, use the drop-down arrow ▾ to set the number of minutes.
   - **Entering your own values for hours and minutes.**

     a. Turn **Custom Duration** ON (with a blue circle on the right), by clicking the right side of the toggle.
     b. In the first field, enter the number of hours.
     c. In the second field, enter the number of minutes.

- **If the appointment lasts for 8 hours or more**, select **All day**.

7. To close the date picker, click **Apply**.
8. If you want to automatically fill out the rest of the form using settings from previous appointments go to: [Use previous settings to create a client appointment].

   If you're going to the topic linked in step 7, you don't need to complete the remaining steps in this topic.

9. To let attendees know they must be able to connect virtually to a remote appointment, click **Remote**.
10. If you know it, in **Meeting Link**, enter the URL that a vendor can use to connect to the online meeting.

    You can update this appointment to add the **Meeting Link** later.

11. If you know it, in **Meeting Info**, enter details such as a meeting ID, password or code that the vendor needs to join the online meeting.

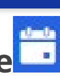
    You can update this appointment to add the **Meeting Info** later.

12. In **Service Type**, select the job you need the vendor to do, such as copywriter, language lead, simultaneous interpretation, sight translation, transcriptionist, and so on.
13. In **Subject Matter**, select the field that a vendor should have qualifications for or competencies in, such as legal or medical subjects.
14. In **Source Language**, select the language that will be spoken at the appointment that you need translated.
15. In **Target Language**, select the language that you want the interpreter to translate the Source Language into.
16. Optionally, if you want to add any of the following details, click **Additional Info**.
    1. **More than one interpreter** — In **Interpreters**, click the **+** plus sign to increase the minimum of 1.
    2. **An interpreter of a specific gender** — In **Preferred Gender Type**, change **No preference** to **Female** or **Male**.

    3. **Specific certification is required** — Click **Require compliances**. In the **Requirements** field that appears, select the area that the interpreter must be certified in to help the client.

17. Optionally, if you need to specify more than one source and target language, click +**Add another language**.
    0. In **Source Language**, select the language that will be spoken at the appointment that you need translated.
    1. In **Target Language**, select the language that you want the interpreter to translate the Source Language into.
    2. In **Interpreters**, click the **+** plus sign to increase the minimum of 1.
    3. In **Preferred Gender Type**, change **No preference** to **Female** or **Male**.
18. If there is more information that you need to provide, in **Notes**, enter any additional instructions or comments.
19. If you want to mark this appointment as needing **Multiple Sessions**, click the right side of the toggle to set it to Yes .
20. To save and create the appointment, do one of the following:
    - If you didn't select **Multiple Sessions**, click **Submit.**
    - If you did select **Multiple Sessions**, click **Next**.
21. To open the appointment, do one of the following:
    - At the top of the screen you'll see a notification that the appointment was successfully created. Click the notification to open the appointment.

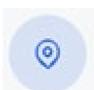
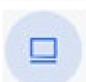
      

    - On the left side menu, select **Schedule**. Find the appointment you just created. To open it, click the name.

Use previous settings to create a client appointment

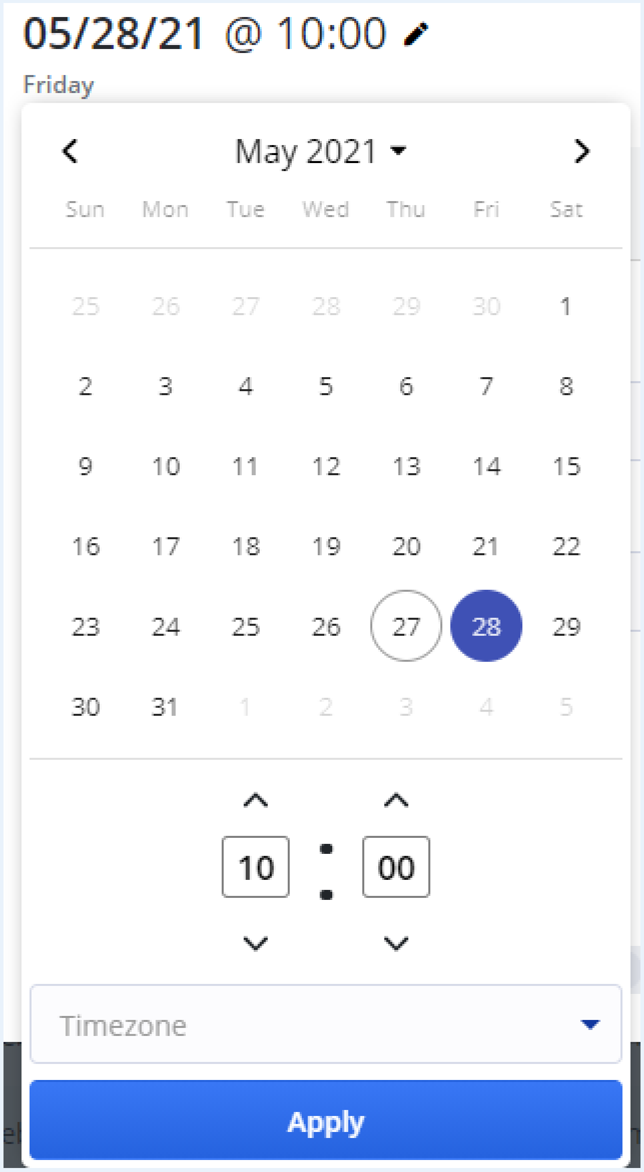
If you've created appointments and you know that some types have the same basic requirements, you can quickly create new appointments using settings from previous appointments. After you add the date, you'll see the **Frequently Used Settings** option. This list shows you 10 previous appointments whose settings have been used the most. You can select one of these previous appointments to automatically fill in the settings for the rest of the form. If you need to, you can edit those settings after they are populated.

The icon before the setting name tells you if the setting is:

-  On-site (in-person)
-  Remote (virtual)

To use previous settings to create an appointment:

1. On the top right side of the screen click the **New Appointment** button.
2. By default, the appointment is scheduled for the next day at 10 AM. To change this, next to the date and time, click the pencil icon .
3. On the date picker, in the calendar, select today's date or any later date.



The current day is circled in grey, and the day you've chosen has a purple circle around it.

4. In the clock listed below the calendar, use the arrow keys to set the time when the deposition starts.

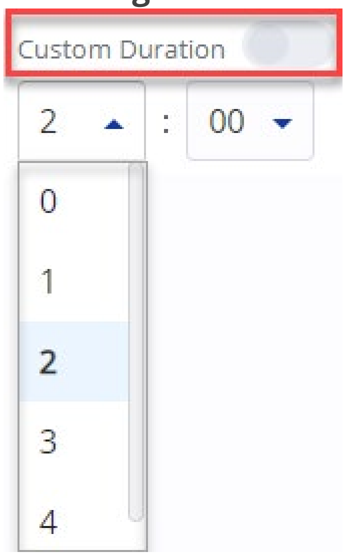
If you're using a 24-hour time format:

- To set a time in the morning (AM), use a number between 0 - 12.

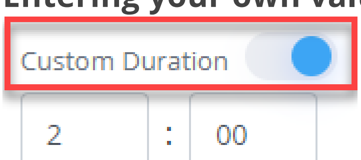
- To set a time in the afternoon or evening (PM), use a number between 13 - 23.

To learn about time formats, read Set Date and Time formats.

5. Select a **Timezone** where the meeting is taking place.
6. On the date and time picker, click **Apply**.
7. To let attendees know how long the appointment lasts, in **Session Duration**, do any of the following:
    - **Selecting the number of hours and minutes.**

      a. Make sure the **Custom Duration** option is OFF, with a grey circle on the left. If it isn't, click the left side of the toggle.
      b. In the first field, use the dropdown arrow to set the number of hours.
      c. In the second field, use the dropdown arrow to set the number of minutes.
    - **Entering your own values for hours and minutes.**

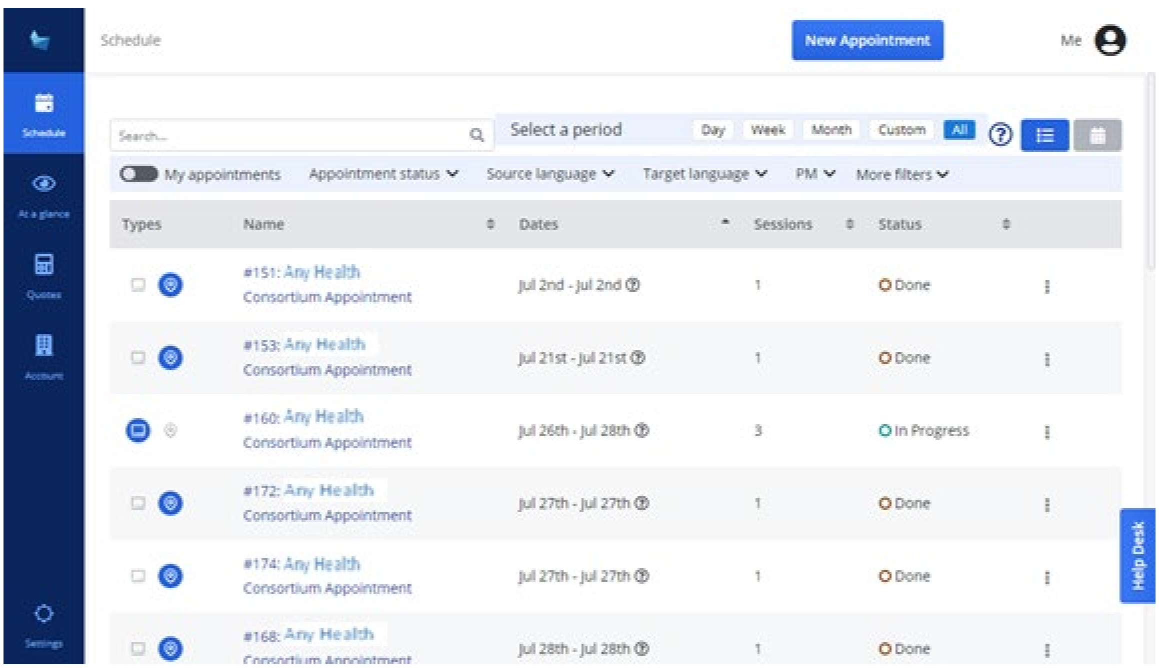
      

      a. Turn **Custom Duration** ON (with a blue circle on the right), by clicking the right side of the toggle.
      b. In the first field, enter the number of hours.
      c. In the second field, enter the number of minutes.
    - **If the appointment lasts for 8 hours or more**, select **All day.**

8. To automatically fill out the rest of the form using settings from previous appointments, click **Frequently Used Settings** and then select a previous appointment.
9. To review the appointment settings:
    1. For on-site appointments, go to [Create an onsite client appointment] and start with step 8.
    2. For remote appointments, go to [Create a remote client appointment] and start with step 9.
10. On the **Create Appointment** form, click **Submit**.

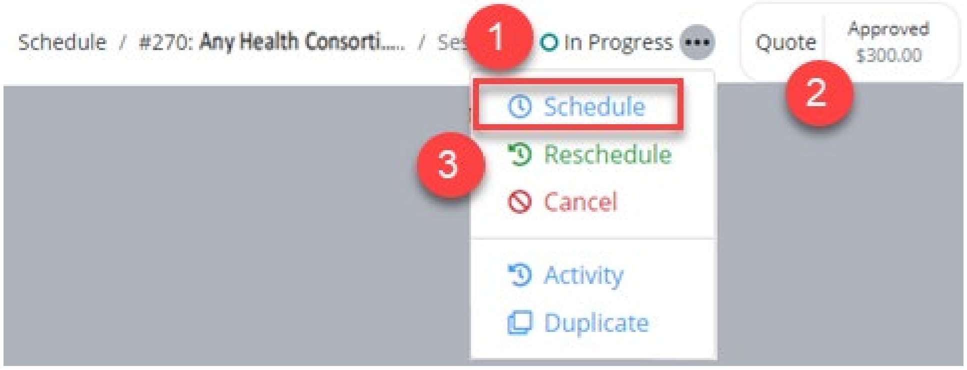
View client appointments in a table

When you sign in to GL Live Booking , the first screen you see is your schedule. By default you see appointments in calendar view for the current month, but you can switch to a table view to see all appointments listed by date, starting from the oldest.



Schedule a client appointment

After you create an appointment and approve the quote, you can schedule the appointment. This action confirms dates and availabilities with all involved parties so the vendor can provide services at your meeting.



Pre-requisites for scheduling an appointment:

1. The appointment status must be In Progress.

For more help with a status, read [Understanding client appointment status].

2. The quote must be approved.

For more help, read Approve a quote for a client appointment.

3. You can see the Schedule option.

You can access this option from the table view or by opening the appointment.

To schedule an appointment from the table view

1. From the menu on the left side, select **Schedule**.
2. If you see appointments in a calendar, go to the top right corner of the screen and click the table view icon.
3. Find the appointment you want to schedule in the list. If you can't find it you can Search for a client appointment.
4. In the appointment's row, click the more menu, and then click **Schedule**.

You see a notification in the top right corner of the screen if there were errors or if the appointment was successfully created.

To schedule an open appointment

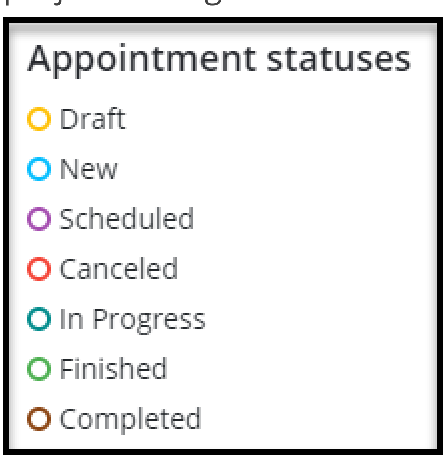
1. From the menu on the left side, select **Schedule**.
2. If you see appointments in a calendar, go to the top right corner of the screen and click the table view icon .
3. Find the appointment you want to schedule in the list. If you can't find it you can Search for a client appointment.
4. Open the appointment by clicking the **Name**.
5. At the top of the screen, next to the **In Progress** status, click the more menu •••, and then click **Schedule**.

You see a notification in the top right corner of the screen if there were errors or if the appointment was successfully created.

Update appointments

As a client account holder, after you create an appointment, you can edit any of the appointment details. You can also add new blocks of time to an appointment if you know you'll need multiple meetings to complete the work. After you create an appointment it stays in a **Draft** state until you take actions to move it through the next stages. You can edit appointment settings in any state except for **Canceled**, **Finished**, or **Complete**.

Appointments cycle through the following stages as you and a TransPerfect project manager work with them:



For more details on what happens at each status, read Understand appointment status.

Search for a client appointment

If you know a word or number in the appointment **Name**, you can use the **Search** box to quickly find an appointment. You can also specify a date range if you know it. You can search in both the table and calendar views.

Filters affect your search results. If you can't find your appointment, check to see if you set any filters that are reducing your results.

By default, GL Live Booking uses the following filter when you search:

My appointments

If you have this toggle turned off, then you see all appointments that meet the search criteria, whether you created them or not.

If you have this toggle turned on, then you only see the appointments you created that meet the search criteria.

For help with filters, read Use filters on the client appointment list.

> You can't search for text in the following fields:
>
> - **Types** (Online, Remote)
> - **Dates** (Feb, 2021)
> - **Sessions** (1, 4)
> - **Status** (Draft, Scheduled, In Progress, Completed, Finished, Canceled)
>
> To reduce the appointment list based on these criteria, Use filters on the appointment table.

To search for a client appointment:

1. From the menu on the left side, select **Schedule**.
2. Select either the list view or the calendar view.

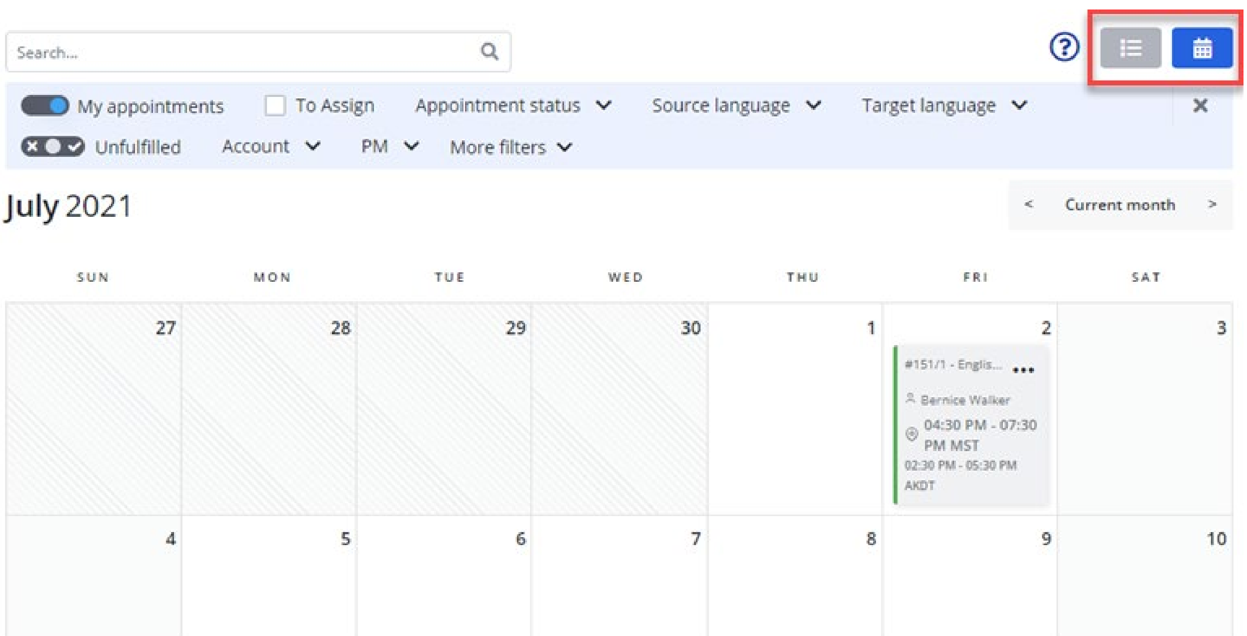
3. To see search results for only appointments you created, set the **My appointments** toggle to on .
4. In the **Search** box, enter a word, number, or phrase that occurs in the appointment's **Name** field.

   You see search results as you type.

5. To clear search results, click the grey x.

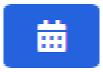
Change views to find an appointment

You can see appointments in either a table or calendar view. By default you see the list of appointments in a table that includes every appointment you've ever created and in every stage. If you only want to see upcoming appointments, you can change your view to the calendar format. The calendar only shows you appointments that are scheduled for the current month. You can choose a previous month to find an appointment that's already occurred, or choose a month in the future to see more upcoming work.



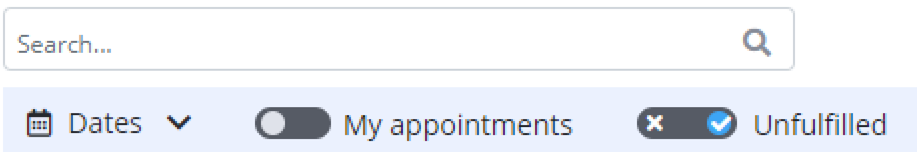
To change views to find an appointment:

1. From the menu on the left side, select **Schedule**.

2. To select the calendar view, in the upper right corner, click the calendar icon .
3. To change back to the list view, in the upper right corner, click the table icon .

Use the search box to find an appointment

If you know a word or number in the appointment **Name**, **Account**, or **Requester**, you can use the Search box to quickly find an appointment. You can use the Search box in both the list and calendar views.

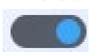


Filters affect your search results. If you can't find your appointment, check to see if you set any filters that are reducing your results.

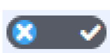
By default, GL Live Booking uses the following filters when you search:

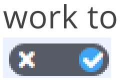
My appointments

 If you have this toggle turned off, then you see all appointments that meet the search criteria, whether you create them or not.

 If you have this toggle turned on, then you only see the appointments you create that meet the search criteria.

Unfulfilled

 If you have this toggle turned off, then you see appointments that meet the search criteria and have been filled by a vendor. You fulfil an appointment by inviting the vendor, confirming availability, and assigning work to the vendor.

 If you have this toggle turned on, then you see appointments that meet the search criteria and have no vendor assigned. After you invite a vendor, you or the vendor must confirm availability, and then you can assign the work to the vendor.

You can't search for text in the following fields:

- **Types** (Online, Remote)
- **Dates** (Feb, 2021)
- **Sessions** (1, 4)
- **Status** (New, Scheduled, In Progress, Completed, Finished, Canceled)

To reduce the appointment list based on these criteria, Use filters on the appointment list.

To use the search box to find an appointment:

1. From the menu on the left side, select **Schedule**.
2. Select either the list view or the calendar view.
3. To see search results for only appointments you created, set the **My appointments** toggle to on.
4. To see search results for only appointments that are not yet filled, set the **Unfulfilled** toggle to on.
5. In the **Search** box, enter a word, number, or phrase that occurs in the appointment's **Name**, **Account**, or **Requester** fields.

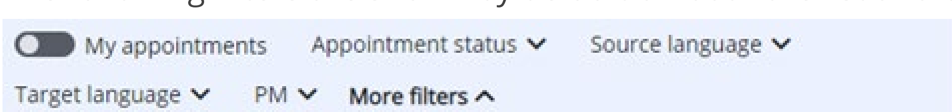
   You see search results as you type.

6. To clear search results, click the grey x.

Use filters on the client appointment list

You can use filters to limit what you see on the table or calendar view. You can set one filter or use a combination.

The following filters are shown by default on both the list and calendar view:



You can also choose from **More** filters:

The **My appointments** filter affects all other filters.
If you can't find your appointment, check to see if the default filters GL Live Booking uses is reducing your list of appointments:

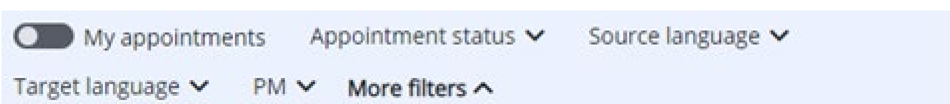
My appointments

- If you have this toggle turned off, then you see all appointments that meet the search criteria, whether you create them or not.
- If you have this toggle turned on, then you only see the appointments you create that meet the search criteria.

Use basic filters on the client appointment list

On both the table and calendar views you have a set of basic filters you can use to narrow the list of appointments and find the one you need quickly. You can set one filter or use a combination.

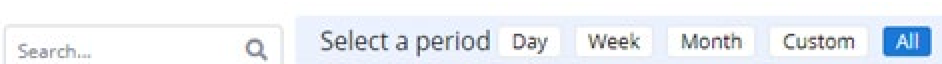
The following filters are shown by default on both the list view and the calendar view:



After you select a filter, the appointments displayed in the table or calendar are automatically updated.

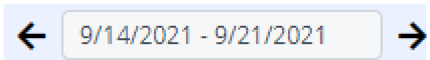
To use basic filters on the client appointment list:

1. From the menu on the left side, select **Schedule**.
2. To see appointments scheduled to occur within a range of days:

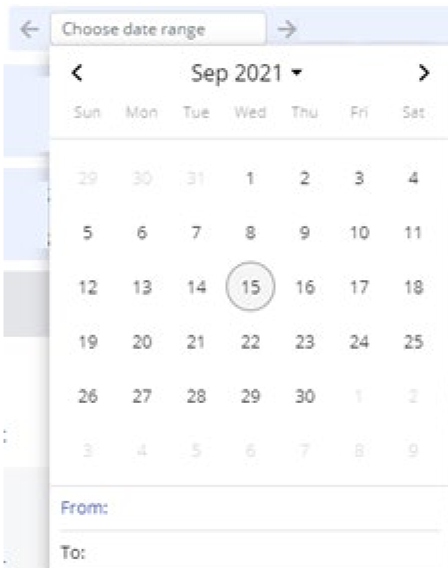


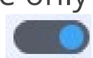
   1. To the right of the **Search** box, select the length of the range as **Day**, **Week**, **Month**, **Custom**, or **All**.

2. In the new field that appears to the right of the **Search** box, the current day, week, or month is automatically set for you. You can change the date or range using the black arrows on either side of the range text box.



3. If you select **Custom**, click in the range text box and a date picker opens for you to choose the dates you want to search in.



3. To see only the appointments you create, set the **My appointments** toggle to on .
4. To see appointments that are in a specific state, click **Appointment status** and choose any of the following: **Draft**, **Scheduled**, **In Progress**, **Finished**, **Completed**, **Cancelled**.
5. To see only appointments that require a specific language to be translated, in **Source language**, select an option.
6. To see only appointments that require a specific language to be the final translation, in **Target language**, select an option.
7. To see all the appointments created by one specific project manager, in **PM**, select an option.

Use more filters on the client appointment list

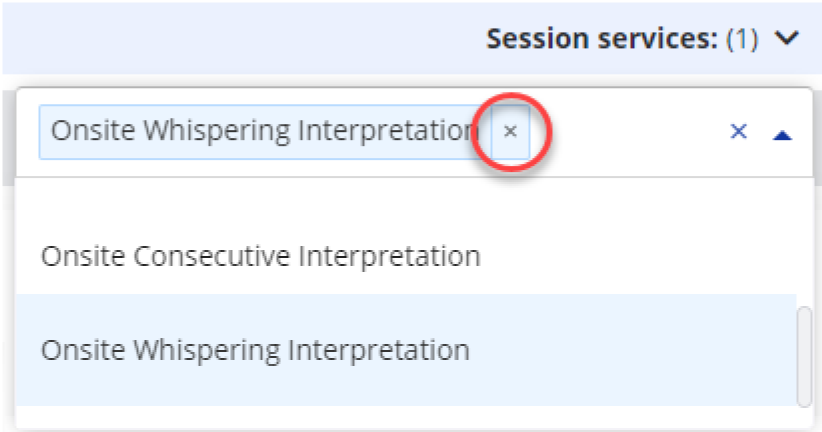
If you want to reduce the appointment list using a filter that isn't on the basic filter toolbar, you can select the More filters option to see other criteria.

You can access the following filters from the **More filters** toolbar on both the table and calendar views:

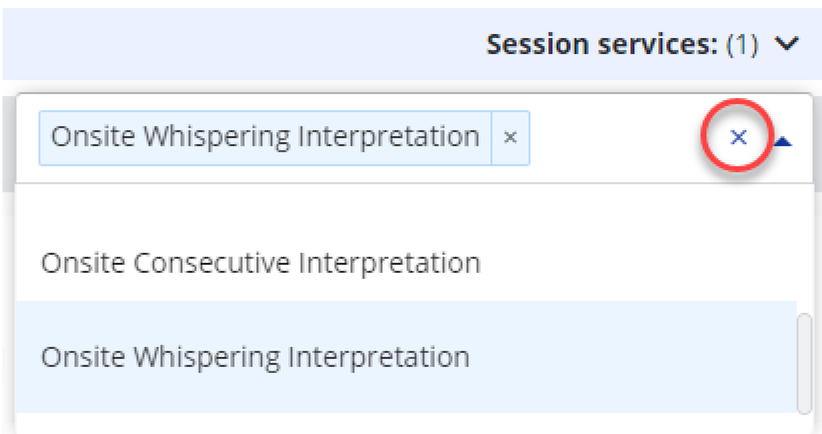
- Keep in mind that the **My appointments** filter affect all other filters. For more information, refer to Use filters on the client appointment list.
- If the standard and **More** filters don't narrow the list of appointments to help you find the one you need, you can also try to:
  - Search to find a client appointment
  - Use basic filters on the client appointment list

To use more filters on the client appointment list:

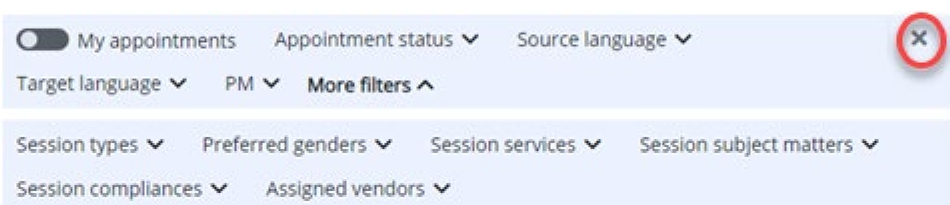
1. From the menu on the left side, select **Schedule**.
2. On the standard filter toolbar, after **PM**, click **More filters**.
3. To see appointments that occur in person, click **Session types**, and then select **Onsite**.
4. To see appointments that occur over an Internet connection, click **Session types**, and then select **Remote**.
5. To see appointments where the client requested a vendor of a specific gender, click **Preferred genders**, and then select **Female** or **Male**.
6. To see appointments where a specific service was requested, click **Session services**, and then select an option.
7. To see appointments where a specific subject is being discussed, click **Session subject matters**, and then select an option.
8. To see appointments where the client requested that a vendor have a specific certification or training, click **Session compliances**, and then select an option.
9. To see appointments where a specific vendor has been assigned, click **Assigned vendors**, and then an option.
10. To clear one option selected for a filter, click the filter and then click the **x**.



11. To clear all options selected for a filter, click the filter and then next to the up arrow, click the **x**.



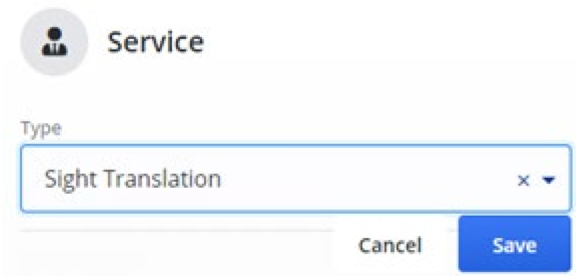
12. To clear all **More** filters, in the basic filters section, next to , click the **x**.



Edit client appointment details

After you create an appointment you can edit most of the settings if it has a status of **Draft**, **Scheduled**, or **In Progress**.

As you edit information, each field has its own **Save** button. Therefore, you can edit a field, click **Save** for that one field, and then go to a different screen without losing your changes.



There are a few pieces of information you can't change by editing an existing appointment. To change the following settings you must create a new appointment:

- **Account**. You can only assign the client when you're creating the appointment.
- **Appointment number**. This number is assigned by GL Live Booking to be unique for each appointment.
- **PM**. GL Live Booking assigns the user who creates the appointment as the project manager.

To edit appointment settings:

1. From the menu on the left side, select **Schedule**.
2. Find the appointment you want to edit in the table or calendar view.

> If you can't find it you can Search for a client appointment.

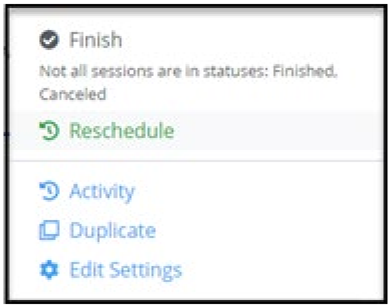
3. Click the **Name** of the appointment.

   The table or calendar view changes to a new screen showing all the details for the one appoointment you selected.

4. In the top banner, you can view any of the following information:

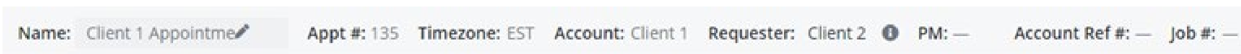
   

   1. To return to the list of appointments to select a new one, click **Schedule**.
   2. To see a list of available actions, click the more menu •••.

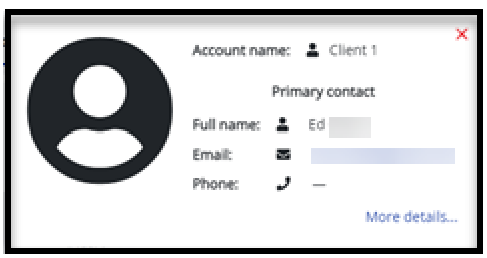


    3. To see who is watching this appointment, click the eye icon .

5. In the next banner, you can only edit or view the following information:

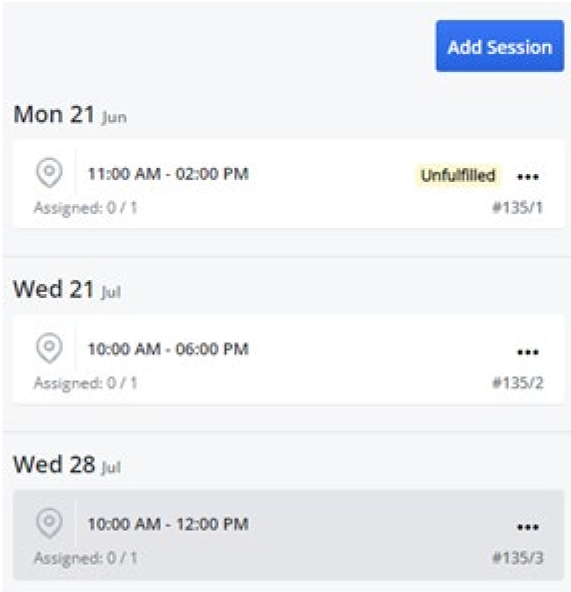


    1. To rename the appointment, next to **Name**, click the pencil icon , edit the text, and click **Save**.
    2. To view more information about the client, next to **Account** click the client's name.

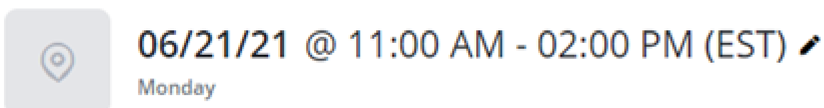


    3. To select a different Transperfect representative as the one who requested the appointment, next to **Requester**, click the pencil icon , select a new name, and click **Save**.
    4. To change the **Account reference number**, click the pencil icon , edit the number, and click **Save**.
    5. To change the job number, next to **Job #**, click the pencil icon , edit the text, and click **Save**.

6. On the **Sessions** tab, select a session to edit if there are more than one.



7. To change any of the details on the date and time banner, click the pencil icon next to the timezone.

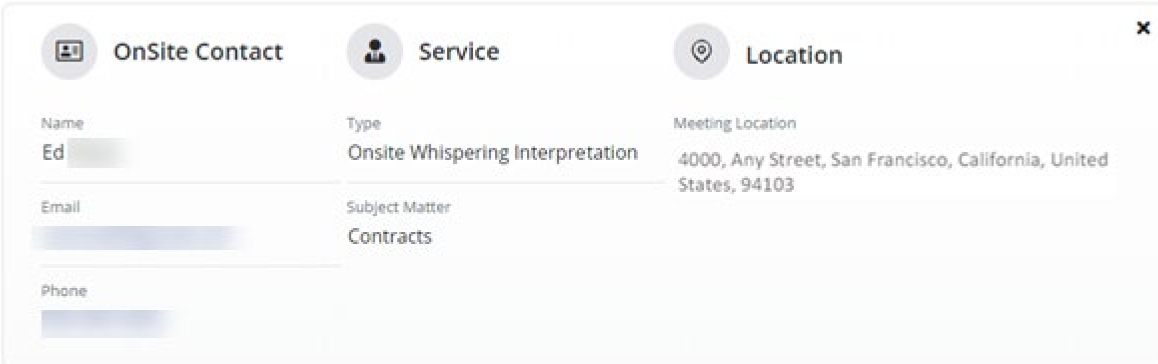


   1. On the **Reschedule Session** dialog, you can select a different **Appointment Timezone**.
   2. In **When's the session?**, click the pencil icon next to the time.
   3. On the date picker, choose a new day and time.
   4. To set the duration:

      ○ To enter a time, turn the **Custom Duration** toggle on and enter the hour and minutes.
      ○ To select a time, turn the **Custom Duration** toggle off, and use the dropdown arrow to select a new number of hours and minutes.
      ○ For a duration of 8 hours or more, select the **All Day** option.

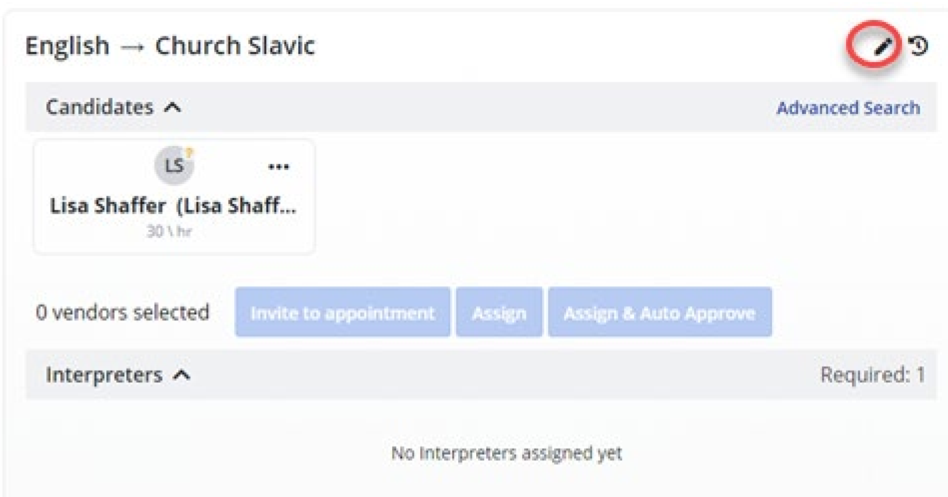
   5. Click **Submit**.
8. To change the **Contact**, **Service Type**, **Subject matter**, or **Location**, click anywhere on the following banner:

This opens a card where you can edit the information. Hover your cursor over any piece of information, click the pencil icon, edit the information, and then click **Save**.



To close the editing card, in the top right corner, click the black ✕.

9. To edit the interpreter requirements for this appointment, click the pencil icon.



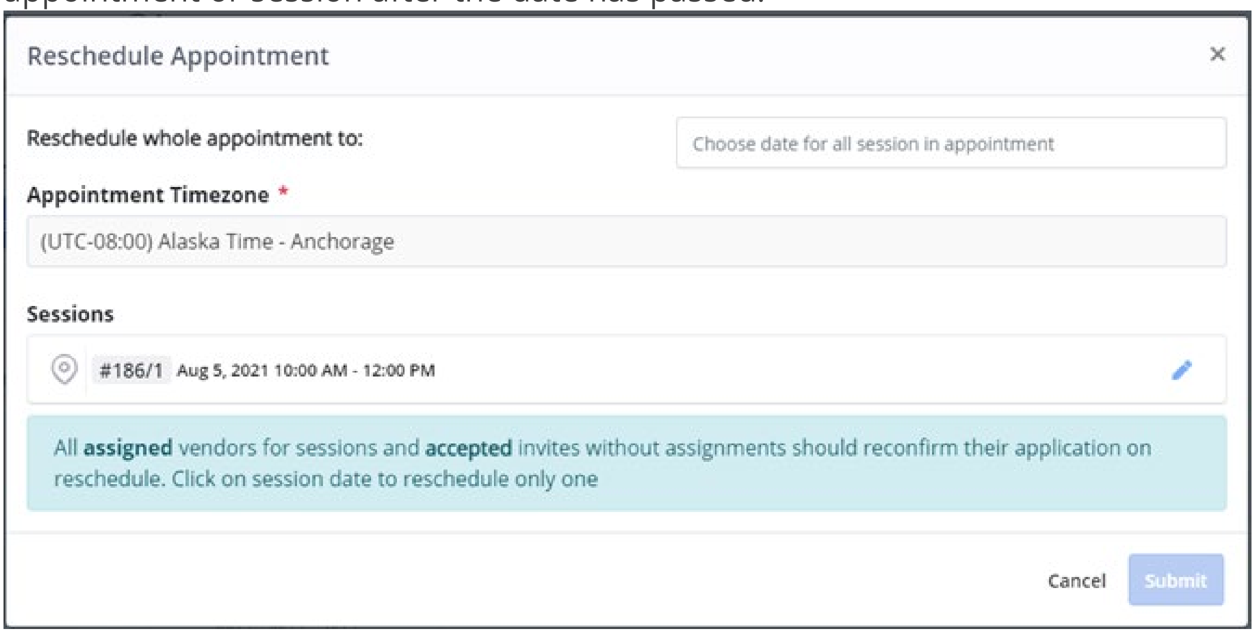
   1. On the **Edit Slot** dialog, make any changes to the **Source Language**, **Target Language**, number of **Interpreters**, and **Preferred Gender Type**.
   2. To add certificate or training requirements, click **Require compliances**.
   3. When you've made all your changes, click **Submit**.

10. To add a requirement for a different type of interpreter, click **+Add new slot**.

   1. On the **Add interpreters** dialog, make any changes to the **Source Language**, **Target Language**, number of **Interpreters**, and **Preferred Gender Type**.
   2. To add certificate requirements, click Click **Require compliances**.
   3. When you've made all your changes, click **Submit**.
11. To add information that wasn't specified in the preceding steps, click **Leave notes** .
   1. On the **Leave Notes** dialog, in the **Notes** text box, enter your comments or instructions.
   2. Click **Submit**.

Reschedule a client appointment

You can change the date of all sessions in an appointment or change the date for one or more specific sessions if the appointment has a status of **Draft**, **New**, **Scheduled** or **In Progress**. You can even reschedule an appointment or session after the date has passed.



> You can't change the following details on the Reschedule Appointment screen:
>
> - **Timezone**
> - **Start time for the meeting**
> - **End time for the meeting**

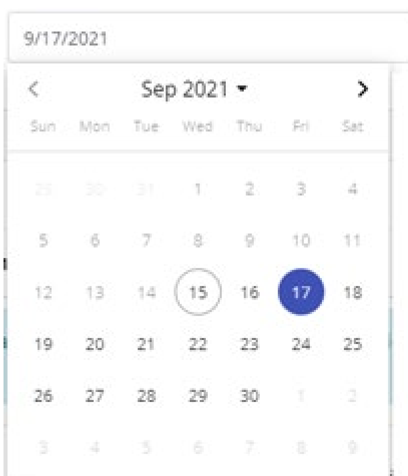
You can change these details after you select a new date and click **Submit**. GL Live Booking returns you to the appointment details screen where you can edit the other information.

To reschedule an appointment:

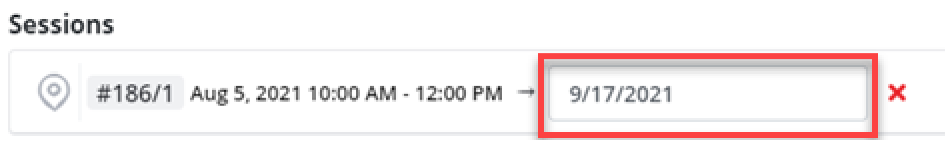
1. From the menu on the left side, select **Schedule**.
2. Find the appointment you want to reschedule in the list. If you can't find it you can Search for a client appointment.
3. In the appointment's row, on the right side, click the more menu, and then select **Reschedule**.

> You can also access the **Reschedule** option after opening the appointment.
> 1. At the top of the screen, after the status, select the more menu.
> 2. Select **Reschedule**.

4. To reschedule all sessions in the appointment, on the **Reschedule Appointment** screen:
   1. Click in the **Choose date for all sessions** box.
   2. On the date picker, in the calendar, select today's date or any later date.



5. To reschedule one or more specific sessions in the appointment, on the **Reschedule Appointment** screen:



   1. In **Sessions**, find the session you want to reschedule, and then click the blue pencil icon .
   2. To open the date picker, click in the text box after the black arrow and select a new date.
6. On the **Reschedule Appointment** dialog, click **Submit**.

Add sessions to an appointment

A session is a block of time you schedule for an appointment. If you know in advance that you need several sessions to complete the work, you can create an appointment with the **Multiple sessions** option turned on. You can also add sessions to an existing appointment at any stage except **Finished** and **Completed**.

If you clicked the notification banner after creating an appointment

Your appointment is already open and you're ready to create a session.

If you Didn't click the notification banner

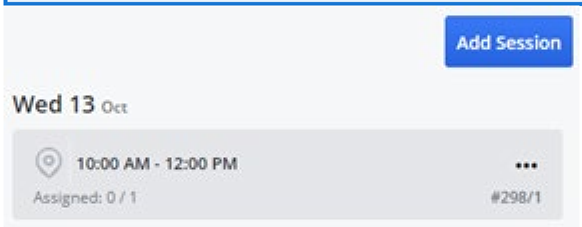
You'll need to open the appointment you want to add sessions to.

a. Select **Schedule** .
b. Find the appointment you just created in the list.
c. To open an appointment, click the name.

Add onsite sessions to a client appointment

A session is a block of time you schedule for a vendor to meet with a client and provide interpreter services. If you know in advance that you need a vendor to meet with your client in person several times to complete the work, you can create an onsite appointment with the **Multiple sessions** option turned on. You can also add sessions to an existing appointment later. You can add onsite sessions to an onsite or remote appointment.

> You can't select the timezone for a session. All sessions occur in the same timezone as the appointment you're adding a session to.

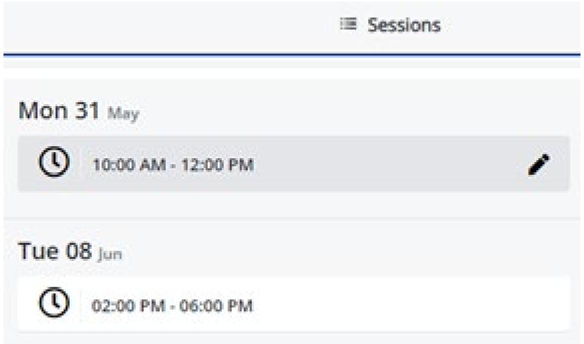


To add an onsite session to an appointment:

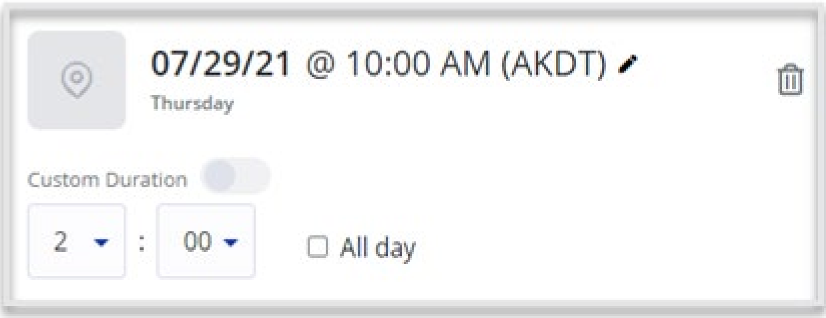
1. On the screen that displays an open appointment, select the **Sessions** tab.
2. Click the **Add Session** button.

   On the **Sessions** tab, a session with tomorrow's date is added.

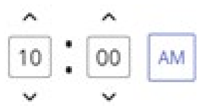
   The session you're editing has the pencil icon next to it.

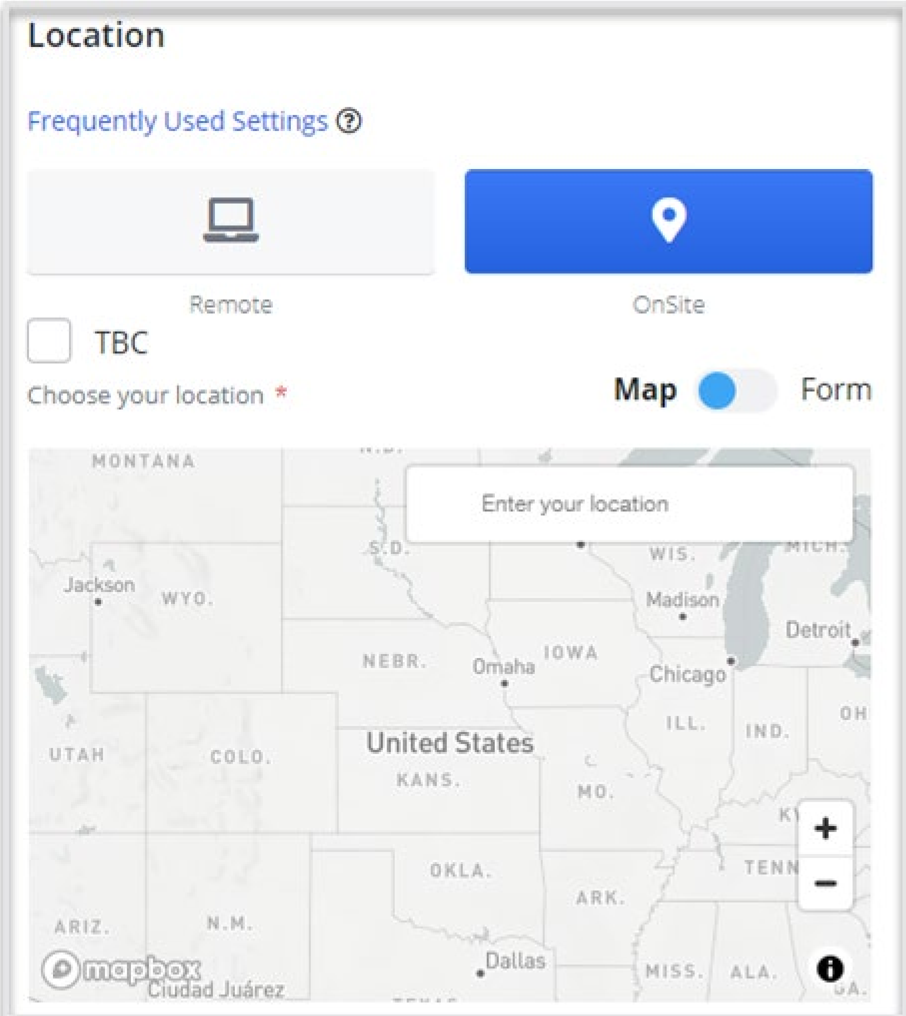
3. On the Session screen, on the first card, specify when the meeting occurs.



   1. To change the date and time, click the pencil icon .
   2. On the date picker, in the calendar, select today's date or any later date.
   3. In the clock listed below the calendar, use the up and down arrows to set the time when the deposition starts.

   4. To close the date picker, click anywhere outside of it.
   5. By default a session is set to last for two hours. To change this, you can select a duration using the down arrows or click **Custom Duration** to enter the hour and minutes. If the appointment lasts for 8 hours or more, select **All day.**
4. In the second card, specify where the meeting takes place.

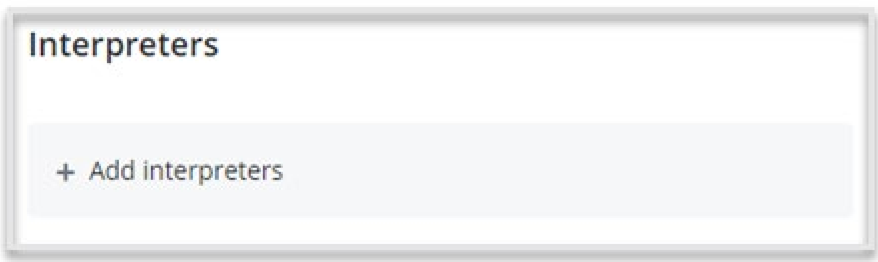


1. If you want to automatically fill out the rest of the form using settings from previous appointments, click **Frequently Used Settings** and go to: Use previous settings to create an appointment.
2. To let attendees know they must attend the appointment in person, in **Location**, click Onsite.
3. If you don't know the address yet, select the **TBC** (To Be Chosen) option.
4. To **Choose your location** visually, set the toggle to **Map** (Map Form), and then in the search box, enter part or all of the address. From the search results, select the correct location.
5. To **Choose your location** by entering text, set the toggle to **Form** (Map Form), and then enter text in **Address**, **Country**, **State**, **City**, and **Zip Code**.

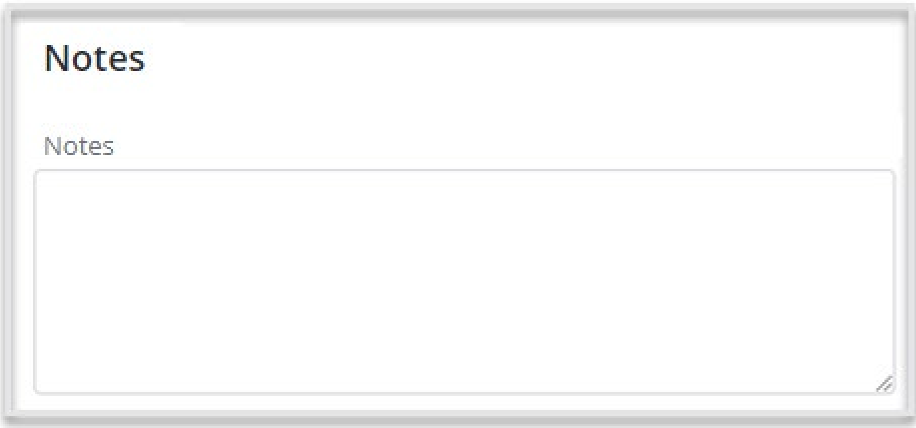
5. In the third card, specify what services the vendor needs to provide.

    1. In **Type**, select the job you need the vendor to do, such as copywriter, language lead, simultaneous interpretation, sight translation, transcription, and so on.
    2. In **Subject matter**, select the field that a vendor should have knowledge of, qualifications for, or competencies in, such as legal or medical subjects.
6. In the fourth card, specify client contact information. The client is the account requesting the vendor services.

    1. Enter the **Name** of the contact at the business requesting an interpreter.
    2. Enter the **Email** address of the contact at the business.
    3. Enter the **Phone** number where the contact at the business can be reached in the form of (Country code)-(Area Code)-123-4567.
7. In the fifth card, specify how many interpreters you need.



    1. Click **+Add interpreters.**
    2. On the **Add Interpreters** dialog, in **Source Language**, select the language that will be spoken at the appointment that you need translated.
    3. In **Target Language**, select the language that you want the interpreter to translate the Source Language into.
    4. To increase the minimum number of **Interpreters**, click the **+** plus sign.
    5. If the client has a **Preferred Gender Type**, change **No preference** to **Female** or **Male**.
    6. If specific certification is required, click **Require compliances**. In the **Requirements** field that appears, select a certification or membership that the interpreter must be certified in to help the client.
    7. On the **Add Interpreters** dialog, click **Add.**
8. Optionally, you can add notes in the sixth card.



9. Click **Create Session**.

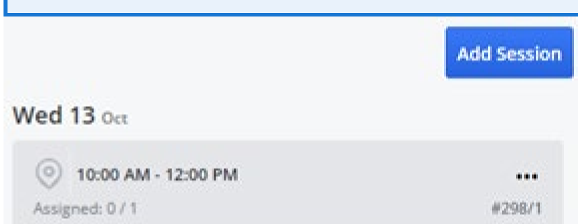
   You can see the session listed on the right side under the **Add Session** button.

   A TransPerfect project manager will see your new session and invite vendors to do the work you require.

Add remote sessions to an appointment

A session is a block of time you schedule for a vendor to meet with a client and provide interpreter services. If you know in advance that you need several virtual sessions to complete the work, you can create a remote appointment with the **Multiple sessions** option turned on. You can also add sessions to an existing appointment later. You can add remote sessions to an onsite or remote appointment.

> You can't select the timezone for a session. All sessions occur in the same timezone as the appointment you're adding a session to.

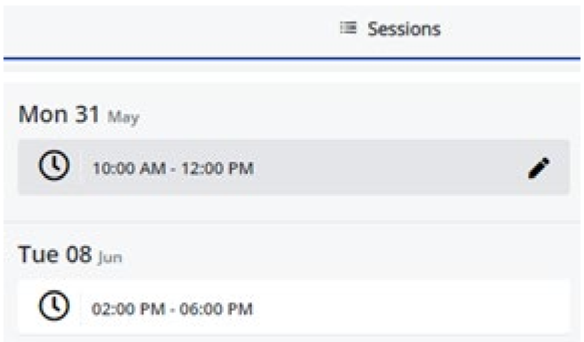


To add a remote session to a client appointment:

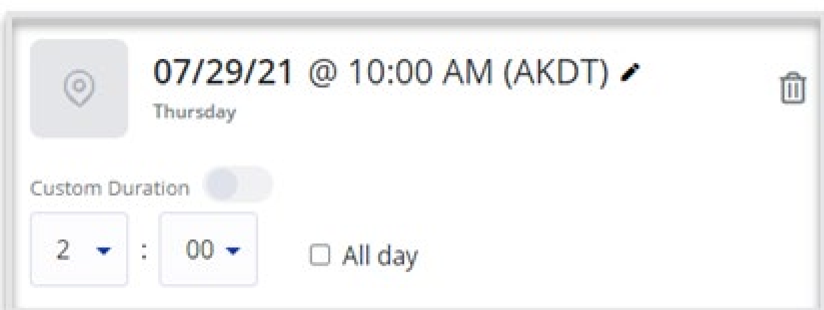
1. On the screen that displays an open appointment, select the **Sessions** tab.
2. Click the **Add Session** button.

   On the **Sessions** tab, a session with tomorrow's date is added to the session list on the left.

   The session you're editing has the pencil icon next to it.

3. On the Session screen, in the first card, specify when the meeting occurs.

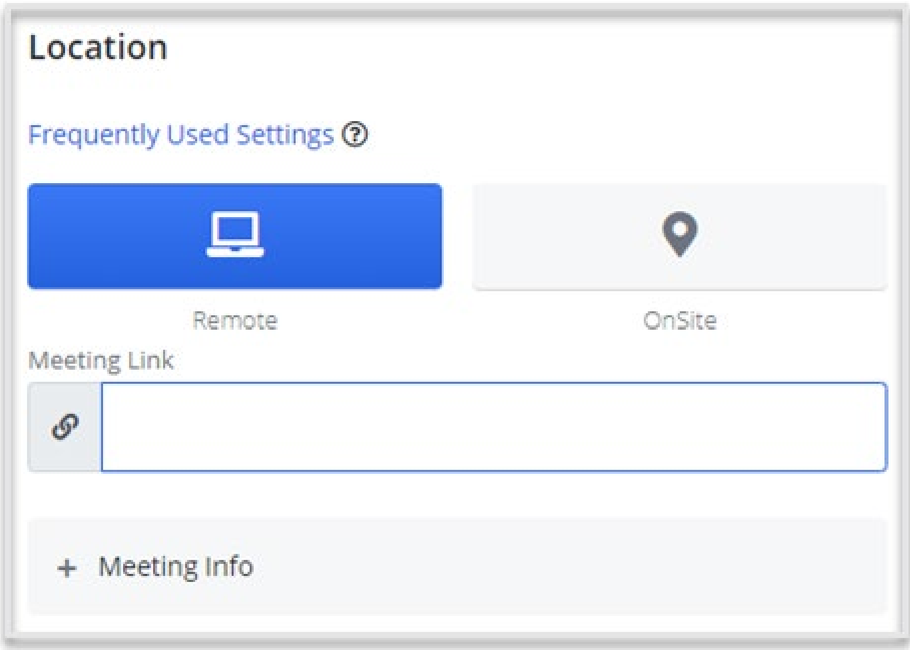
   1. To change the date and time, click the pencil icon.
   2. On the date picker, in the calendar, select today's date or any later date.
   3. In the clock listed below the calendar, use the up and down arrows to set the time when the deposition starts.

   4. To close the date picker, click anywhere outside of it.
   5. By default a session is set to last for two hours. To change this, you can select a duration using the down arrows or click **Custom**

Duration to enter the hour and minutes. If the appointment lasts for 8 hours or more, select **All day.**

4. In the second card, specify where the meeting takes place.



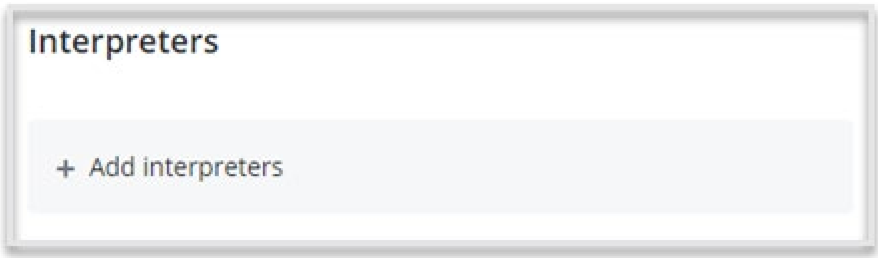
    1. If you want to automatically fill out the rest of the form using settings from previous appointments, click **Frequently Used Settings** and go to: Use previous settings to create an appointment.
    2. To let attendees know they must be able to connect virtually to a remote appointment, in **Location**, click **Remote**.
    3. In **Meeting Link**, enter the URL that a vendor can use to connect to the online meeting.
    4. Optionally, to enter details such as a meeting ID, password or code that the vendor needs to join the online meeting, click **+ Meeting Info** and enter your instructions.

5. In the third card, specify what services the vendor needs to provide in the third card.

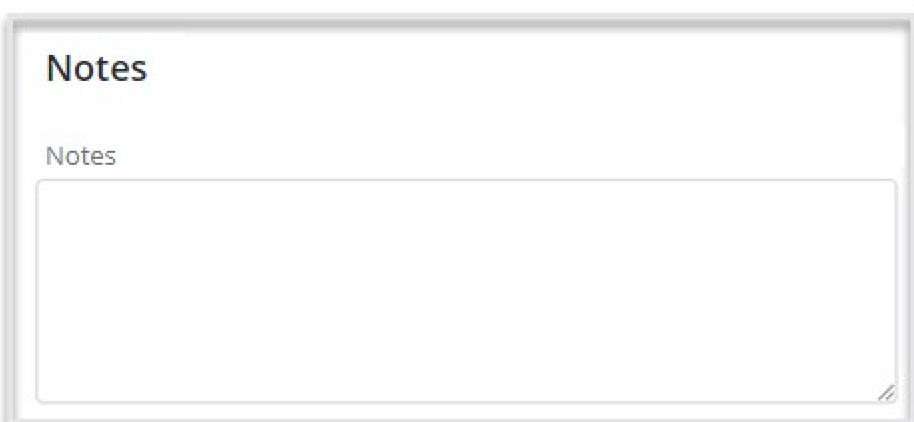
    1. In **Type**, select the job you need the vendor to do, such as copywriter, language lead, simultaneous interpretation, sight translation, transcriptionist, and so on.
    2. In **Subject Matter**, select the field that a vendor should have qualifications for or competencies in, such as legal or medical subjects.
6. In the fourth card, specify client contact information. The client is the account requesting the vendor services.

    1. Enter the **Name** of the contact at the business requesting an interpreter.
    2. Enter the **Email** address of the contact at the business.

    3. Enter the **Phone** number where the contact at the business can be reached in the form of (Country code)-(Area Code)-123-4567.
7. In the fifth card, specify how many interpreters you need in the fifth card.



    1. Click **+Add Interpreters.**
    2. On the **Add Interpreters** dialog, in **Source Language**, select the language that will be spoken at the appointment that you need translated.
    3. In **Target Language**, select the language that you want the interpreter to translate the Source Language into.
    4. To increase the minimum number of **Interpreters**, click the **+** plus sign.
    5. If the client has a **Preferred Gender Type**, change **No preference** to **Female** or **Male**.
    6. If specific certification is required, click **Require certificates**. In the **Certifications** field that appears, select the area that the interpreter must be certified in to help the client.
    7. On the **Add Interpreters** dialog, click **Add.**
8. Optionally, in the sixth card, you can add notes.



9. Click **Create Session**.

You can see the session listed on the right side under the **Add Session** button.

A TransPerfect project manager will see your new session and invite vendors to do the work you require.