# Supplier: Approve/Reject Offers

This document provides suppliers with the steps necessary to approve/reject Offers. This guide uses standard IQN VMS configuration. Your specific setup may vary slightly based on your client's configuration.

## To View Offers Submitted for Approval:

1. Log in to IQNavigator using your *user name* and *password*. Your Home dashboard displays.
2. Click the **offers to approve** link located in the Work Orders/Assignments section of the Status column on the right-hand side of the screen. The Work Orders – offers to approve list screen appears.

**NOTE**: This list is specific to YOUR user role and reflects Work Orders/Assignment Amendments for which you are the designated contact person. Work Orders track the contractual terms of the offer and the non-contractual information fields are managed under the assignment record.

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|  | *• Use the Results per Page pull-down selection option on the right-hand side of the screen to adjust how many records display per screen.*  *• Click the GO arrow  to update your list if you select a different display option.*  *• Click any column header to change the sort order. The default sort order is by Start Date, oldest first.*  *• Click the column header a second time to sort in reverse order.*  *• Click the  Search & Filter (offers to approve) link at the top of your screen for additional search/filter options.* |

### To view/adjust the assignment record (non-contractual information fields):

* Verify that the selection option in the Work Order Actions column is “view assignment”.
* Click the GO arrow  to view the assignment record. The assignment record opens on the Assignment Management Summary tab (final tab).
* Click any section tab to go directly to a specific tab or use the Next/Previous buttons at the bottom of the screen.
* Contact the CAM (Client Account Manager) or Hiring Manager if adjustments are needed to “read only” content.
* Update the General Supplier Organization tab if adjustments are needed for:
  + Managing Supplier Agent
  + Supplier Accounting Representative
  + Supplier Organization Resource ID (used to track a supplier’s unique identifier for reporting purposes).
  + Resource Email
* Update the Onboarding Checklist tab to include the Contractor’s email address and any status updates to the checklist activities.
* Click the Save button () on the Assignment Management Summary tab if you made ANY changes/adjustments on ANY tab. This is the only “save” option for the assignment record.
* Click the return to list button () to exit the assignment record and go back to the Offers to Approve list.

### To view the Work Order (contractual terms):

* Click the number link in the Work Order / Effective Amend. # column for the position offer you want to review. The Offer record opens on the Position and Resource Detail tab (first tab).
* Click any section tab to go directly to a specific tab or use the Next/Previous buttons at the bottom of the screen.
* Contact the CAM (Client Account Manager) or Hiring Manager if adjustments are needed to “read only” content.
* Select an “Is Taxable?” value on the Position and Resource Detail tab if the field is blank. This is a required field as noted by the red asterisk (\*). (Your selection saves based on the Work Order Actions selection you pick on the Work Order Summary tab.)  
  **PLEASE NOTE**: The “Is Taxable?” selection is only available for organizations where US Sales Tax is configured. It does not apply if not configured for the US. Check with your Program Office about enabling other front office tax rules. Typically, this is for other countries or regions, like India, Canada, etc. where the supplier must select the tax rule they want to apply. It is not a Yes/no selection.
* Continue to the next section.

### To approve or reject the offer (including review):

* Go to the Work Order Summary tab of the position offer (see section above for details.)
* Review the Acceptance Terms and Conditions statement at the top of the tab section.
* Verify there is an “Is Taxable?” selection on the Position and Resource Detail tab. This is a required field as noted by the red asterisk (\*).
* Select one of the available Work Order Actions:
  + Click **approve** to accept the offer as stated. A dialog window opens requesting you confirm your “Is Taxable?” selection.
    - Click **OK** to confirm. Enter the Resource email on the final confirmation screen.
    - Click **OK** to confirm. The screen refreshes back to the Offers list and the Work Order Status updates to reflect the approved offer.
    - Or, click **Cancel** to close the initial dialog window.
    - Go back and adjust your “Is Taxable?” selection.
    - Repeat the approval steps described in this section to continue.
  + Click **reject** to decline the offer. A dialog window opens. Use the checkboxes to indicate your reason(s) for declining. (Multiple selections are permitted.) Use the Other Reason text field if there is no reason match. Click **OK** to confirm and exit.
  + *Optional*. Click **collaboration** to submit a Public or Private note.
  + Click **view assignment** to go to the assignment record.
  + Click **return to work orders** to take no action and exit the Offer screen.

## Express Approval:

1. Log in to IQNavigator using your *user name* and *password*. Your Home dashboard displays.
2. Click the **offers to approve** link located in the Work Orders/Assignments section of Status column on the right-hand side of the screen. The Work Orders – offers to approve list screen appears.
3. Use the checkbox to select the offer you want to approve.

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|  | The approval process includes final selection for the assigned Supplier Accounting Representative (SAR) and the “Is Taxable?” field. The selections you enter will apply to ALL records you “checked” to approve. **Take care that if you check multiple offers to approve as a single group that ALL the offers in your group should be assigned the same SAR and “Is Taxable?” value.** |

1. Click the approve button () located at the top of the checkbox column. The Approval Wizard screen appears.
2. Verify/Update the Supplier Accounting Representative (SAR) Name and Is Taxable? Selections. These are required fields as noted by the red asterisk (\*). *Optional*. If no resource is associated to the Work Order/Assignment, you will be prompted to assign one or create a quick resource record now. Follow the prompts.
3. Click the next button () to continue. The Approval Wizard Confirmation screen appears.
4. Verify/Update the Resource Email entry for each listing. This is a required field as noted by the red asterisk (\*).
5. Click the approve button () to complete the approval. BE AWARE! Once you click approve, your approval is final. There is no secondary confirmation screen to confirm your intent. The screen refreshes to a status screen with the update that your approval is being processed. Once complete, the screen returns to your offers to approve list screen.

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|  | The express method streamlines the overall approval process by eliminating visibility to the full Work Order / Assignment record. The Acceptance Terms and Conditions statement visible on the Work Order Summary tab is only accessible if you use the **link** to view the full record. |