ENABLE SELF-ASSIGN FOR CUSTOMER ACCOUNTS

DESCRIPTION

When activated, vendors with self-assign option on, can accept new assignments without requiring approval process from the management. Responsibility to manage time is shifted from the project managers (PM) to the vendors.

Each account can be configured independently from other accounts, sub or main accounts of the same customer.

ACTIVATE SELF-ASSIGN FOR CUSTOMER ACCOUNTS

Navigate to TOOLS AND SETTINGS > ACCOUNTS AND USERS > ACCOUNT CENTER.

Select account of your choice and click on EDIT button.

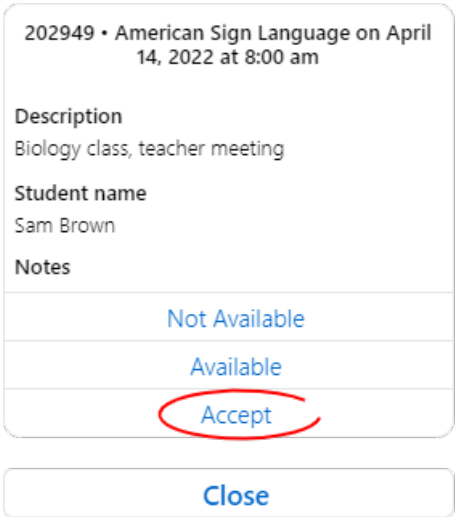
Navigate to SETTINGS > OPTIONS tab and check ALLOW SELF-ASSIGN.



To complete configuration, select and configure vendor profiles who are authorized to use self-assign.

Read more on how to activate self-assign option for vendors.

When self-assign option is activated for both, vendor matching all requirements and account posting the request, On the Spot! displays extra option to Accept assignment.



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