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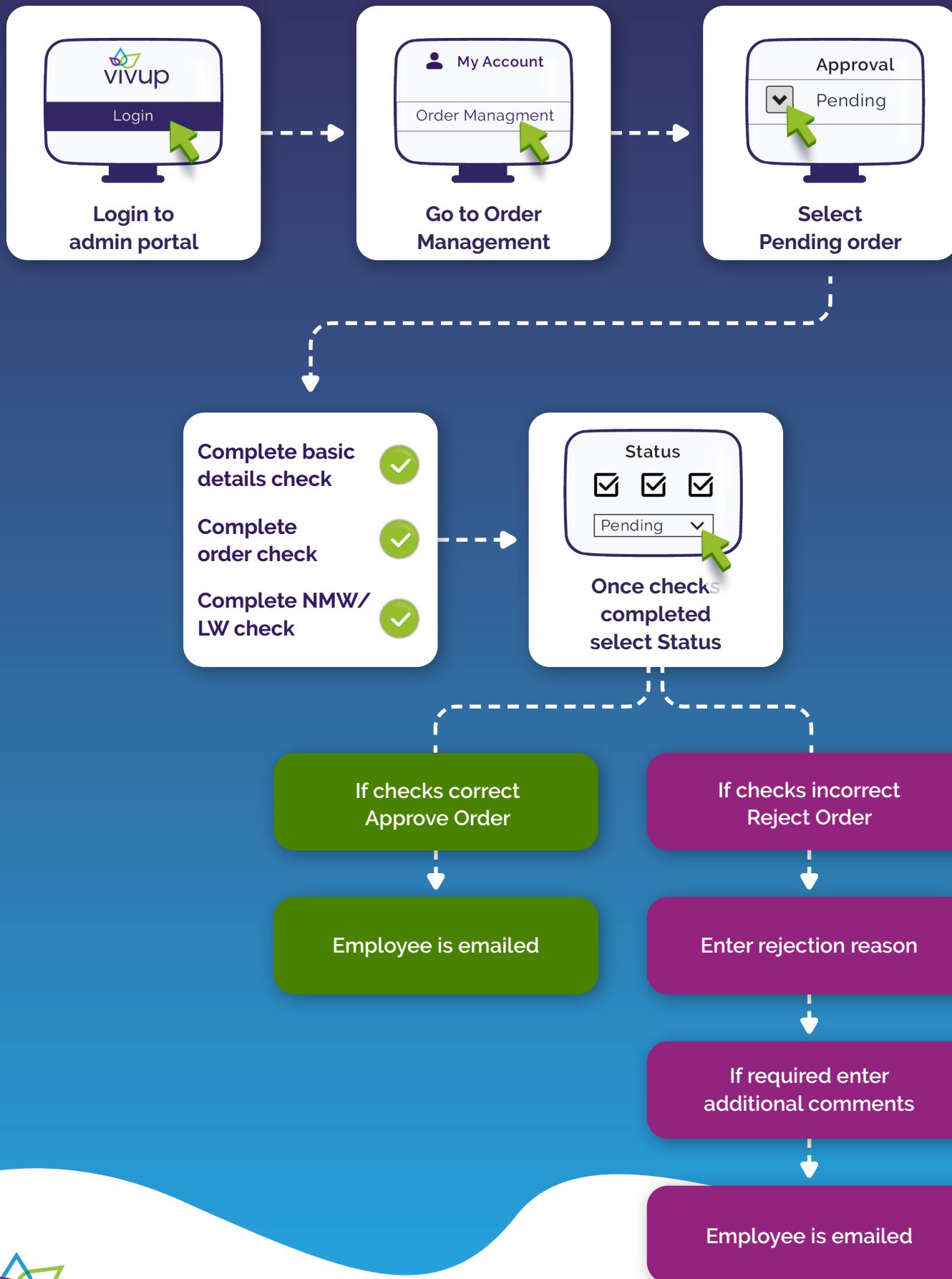
Order Management:
Approvals and Rejections

This guide has been created for employers to approve or reject employee orders within the Order Management section of the Admin area on the Vivup platform. The Order Management section has the functionality to view, approve, and report on orders placed within your organisation. If you need support with this, please contact your Vivup Client Success Manager

Contents

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Quick Flow

Login to admin portal
↓
Go to Order Management
↓
Select Pending order
↓

Complete basic details check ✓
Complete order check ✓
Complete NMW/LW check ✓
↓

Status
Pending
Once checks completed select Status

If checks correct Approve Order
↓
Employee is emailed

If checks incorrect Reject Order
↓
Enter rejection reason
↓
If required enter additional comments
↓
Employee is emailed

How to View Your Orders

1) Log in to the admin area of the portal

2) Select My Account in the top right corner of the platform

3) Select Order Management

4) All of your orders will be displayed

You can choose to view orders in Order List View or Benefit List View

Selecting the Benefit List View button will allow you to see the status summary of all the orders for each benefit you are running, and the total savings that each benefit is providing your organisation

Displaying all 9 benefits

Note: Employer savings are calculated by adding together the savings for each enabled order marked as "Accepted" or "Pending"

Benefit month	Benefit type	Pending	Rejected	Accepted	Employee Cancelled	Employer Savings	View orders
Nov 2023	Bike Shop - OLD	0	0	0	0	£0.00	View orders
Nov 2023	Travel and Leisure	0	0	1	1	£0.00	View orders
Nov 2023	Pension Advice	0	0	0	0	£0.00	View orders
Nov 2023	Annual Leave Purchase	0	0	0	0	£0.00	View orders
Nov 2023	Home and Electronics	2	0	1	0	£461.56	View orders
Nov 2023	Cycle to Work	1	2	1	0	£268.93	View orders
Nov 2023	Bike Shop	0	1	0	0	£0.00	View orders
Nov 2023	Family Pay	0	0	0	0	£0.00	View orders
Nov 2023	Gym Membership	0	0	0	0	£0.00	View orders

Displaying all 9 benefits

There are tabs to allow you to view and manage orders by benefit type
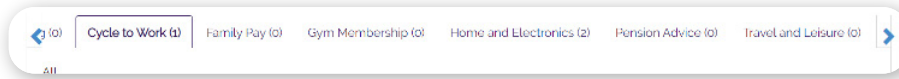

You can search orders by
- First Name
- Last Name
- Employee Number
- NI Number
- Benefit month

You can filter orders using the drop downs by

- Organisation Approval Type
  - All
  - Pending
  - Accepted
  - Rejected
- Order Status Type
  - All
  - Active
  - Ended
  - Cancelled by Employee (this is only for fully cancelled orders. Orders with multiple lines where one line has been cancelled will show as active)
  - Active – amended order
  - End – amended order

There is a toggle to allow you to easily view employee cancelled orders
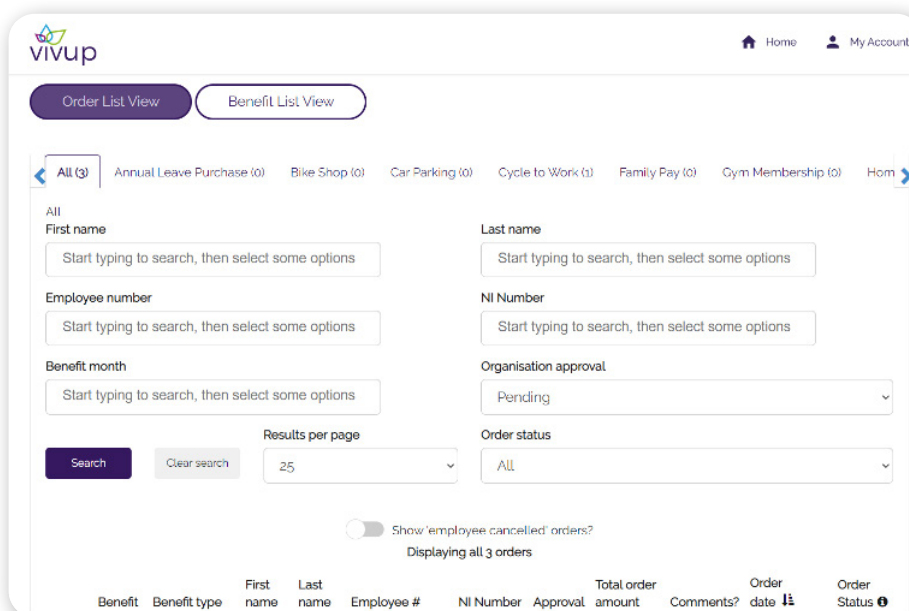
Creating Order Reports

1. To create an exportable report, you need to select the data you want to report on
2. Enter relevant search criteria in the boxes and select the Search button

In this example, you want to see all the Employee Cancelled orders.

3. Once you are happy this is the data you need, select Download Excel List button
4. This will generate an email containing a download link to your file

How to Check an Order

1) Log in to the admin area of the portal

2) Select My Account in the top right corner of the platform

3) Select Order Management

4) use the search functions previously described to locate the order you wish to check

5) Select the grey drop down arrow on the left hand side of the screen to bring up the full details for that pending order

6) Select the Basic Details Check section and check the employees basic details are correct

7) If they are correct, slide the Check Complete toggle to the right. If they are incorrect, you will reject the order after checking the other sections

8) Select the order details section and check the order details are correct.
At this point you can also view the hire agreement paperwork

9) If they are correct, slide the Check Complete toggle to the right. If they are incorrect, you will reject the order after checking the other sections

10) Select the National Minimum and / or Living Wage section

11) Select whether the employee is paid by annual hourly salary

12) Enter the employee's annual/hourly salary and hours per week

13) Enter the value of any other existing salary sacrifice (if applicable)

> **Note – all Vivup salary sacrifices from previous orders will automatically pull through into existing order reductions**

14) Select Calculate National Minimum and / or Living Wage

15) If the employee is equal to or above national minimum wage, slide the Check Complete toggle to the right. If they are below the National Minimum and / or Living Wage, you will reject the order

Approving an Order

If all three checks are correct and have been marked as completed, you can now progress to approving the order

1)   Select Status and update it to Approved

2)   Select Submit to complete the approval

3)   This will automatically email the employee to update them

Once an order is marked as Accepted, it cannot be put back to Pending. You should therefore be certain that all necessary checks have been completed successfully

Rejecting an order for National Minimum Wage and / or Living Wage

If the employee is below national minimum wage and / or living wage, the calculator will calculate how much they can spend OR advise that Salary is too low - no sacrifice can be made. The figure calculated is for monthly payments and not total order value

The employee's hourly rate falls below the National Minimum and/or Living Wage

Maximum Monthly Amount that can be salary sacrificed

Salary is too low - no sacrifice can be made

Calculate National Minimum and/or Living Wage

1. On the Status screen, change the status to Rejected

2. A dropdown menu called Rejection Reason will appear
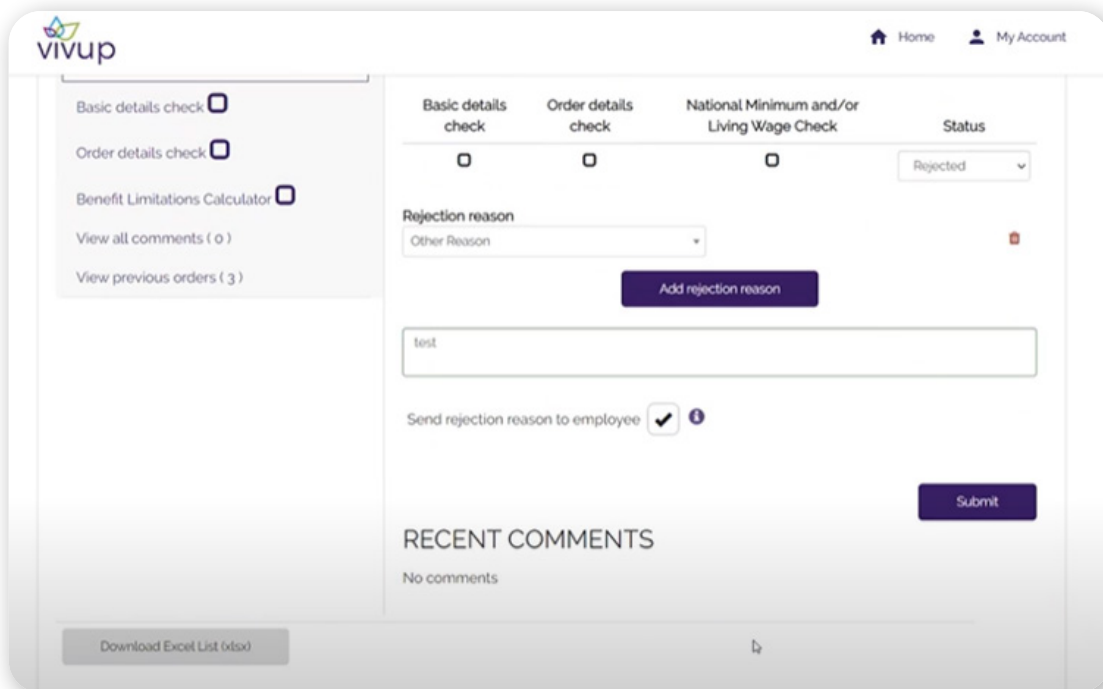
3. Select National Minimum Wage as a rejection reason and enter the Monthly Amount Available to Spend

    a. For Salary Too Low - no sacrifice can be made. Enter a '0' in Monthly Amount Available to Spend field

    b. If there is a Maximum Monthly Amount that can be salary sacrificed, enter the value shown on the calculator screen in the Monthly Amount Available to Spend field

4. If National Minimum Wage and / or Living Wage is the only reason for rejection, select Submit to complete the rejection. This will automatically email the employee to update them

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How to reject an order for all other reasons

1. On the Status screen, change the status to Rejected

2. A dropdown menu called Rejection Reason will appear

3. Select a rejection reason from the list. The full list of reasons can be seen in appendix one. If you select the incorrect rejection reason, you can remove this by either selecting the correct reason in the same box or by clicking the delete icon

4) An additional information box will automatically appear for you to enter the additional information. You should only include factual and non-confidential information e.g., if the order is being rejected for medical reasons simply state 'Medical Reasons' in the comments

5) You can choose to send these rejection reason comments to the employee by ticking the Send Rejection Reason to employee box

6) Check the information entered is correct and select Submit to complete the rejection. This will automatically email the employee to update them

Please ensure that all mandatory information is entered otherwise you will not be able to submit the rejection. If you make an error or submit the wrong rejection reason, please contact your Client Success Manager to amend the order back to Pending

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Help and Support

If you have any questions relating to the process, please contact your Client Success Manager

FAQ's

What happens if I submit the wrong rejection reason?

If you make an error or submit the wrong rejection reason, please contact us to amend the order back to 'Pending'

What should I do if I need to select more than one reason code?

If you are entering more than one rejection reason, you must enter a different rejection reason each time. Please do not repeat rejection reasons

I cannot submit the order. What should I do next?

You will not be able to submit unless all mandatory fields are completed. If you have completed all mandatory fields and are still experiencing problems, please contact our Customer Service Team

Who should I contact if I wish to redact information supplied on a rejected order?

Please speak to your Client Success Manager who will raise this internally

How do I review previous rejection reasons?

You can filter the orders by rejection and download an excel file to review previous rejection reasons

Appendix 1

Order Rejection Reason	Additional Information	Additional Comment Field
The below reasons can all be resolved and Vivup will support your employees to place a new order which can be authorised		
Scheme Limitation	**Amount available to spend** Non-Mandatory	**Mandatory**
Fixed Term Contract	**Contract End Date** **Mandatory**	Non-mandatory
Probation/Month service completed	**Date to reapply** **Mandatory**	Non-mandatory
DOB	Non-mandatory	Non-mandatory
Assignment/Employee Number	Non-mandatory	Non-mandatory
National Insurance Number	Non-mandatory	Non-mandatory
Email Address incorrect	Non-mandatory	Non-mandatory
Incorrect Address	Non-mandatory	Non-mandatory
Phone Number	Non-mandatory	Non-mandatory
Wrong Name	Non-mandatory	Non-mandatory
Can't find person/Incorrect organisation	Non-mandatory	Non-mandatory
The below reasons may restrict an employee from placing another order		
Bank Staff	Non-mandatory	Non-Mandatory
Personal/HR Reason	Non-mandatory	**Mandatory**
Other Reason	Non-mandatory	**Mandatory**
Maternity/Paternity/Adoption	**Date to reapply** Non-mandatory	Non-mandatory
Sick Leave	Non-mandatory	Non-mandatory
National Minimum Wage		
National Minimum Wage	**Monthly amount available to spend** **Mandatory**	Non-mandatory