OOH Contracts

This section outlines the Out-of-Home (OOH) contract management functionality within MEplan. It explains how planners can request, generate, authorise, and finalise OOH contracts involving internal authorisers and media owners. The chapter covers both contract request workflows and direct contract generation workflows, detailing each stage from schedule creation and authorisation through to vendor signing and contract completion. It also highlights contract tracking, dashboard status visibility, and digital signature setup to support a streamlined and auditable OOH contract process.

Sending Contracts

> **Note:** This workflow applies when the planner **generates and sends a contract** directly to the Media Owner.

Generating a Contract

1. Navigate to the **Contracts** tab on the schedule.
2. Enter a **Description** and select the **Media Owner**, then **Save ( ).**
3. Open the contract line **options menu (⋮)** and select **Generate Contract**.
4. In the contract window:
   - Select a **template**
   - Choose an **authoriser**
   - Upload a schedule **or** generate one using a pivot report
5. Select **Save & Request Authorisation** to send the contract to the authoriser.

Uploading a schedule manually

1. Select **Upload existing schedule**
2. Upload the file from your computer

Generating a schedule

1. Select **Generate schedule**
2. Choose the pivot template and select **Generate**

Once generated, the schedule is automatically embedded into the contract.

> **Important:** A contract cannot be saved unless a **template**, **authoriser**, and **schedule** are included.

Authorising or Rejecting Contracts

The authoriser accesses the contract via the **email link** or by navigating to **Overview → Contracts**.

Available actions:

- **Approve Document** – Applies the authoriser’s signature
- **Reject Document** – Requires a rejection reason and updates the status
- **Reset Contract** – Removes all linked items and clears the contract from Authorisations

Status updates and confirmation emails are automatically sent.

> **Note:** Authorisers can monitor all contract statuses—Awaiting Approval, Approved, Rejected, Awaiting Vendor, and Complete—via the **Authorisation In Status** dashboard fact box.

Requesting Vendor Authorisation

After internal approval:

1. Select **Request Vendor Authorisation** from the contract **options menu (⋮).**
2. Enter and confirm the vendor’s email address.
3. Multiple recipients can be added using the **plus (+)** icon.

Once sent, the contract status updates to **Awaiting Vendor Contract**.

When the signed contract is returned, the status changes to **Contract Returned**, and can then be marked as **Complete**.

Contracts Overview

A full list of contracts can be viewed by navigating to **MEplan → Contracts**.
This view displays contract numbers, statuses, email history, and can be exported to Excel.

Requesting Contracts

> **Note:**
>
> - Request-contract functionality must be configured in **NAV** on the **Vendor Card → Contract Source → Vendor**.
> - This workflow applies when the planner/requester **requests a contract** directly from the Media Owner.

Generating a Contract Request

Once the suggested OOH sites have been scheduled, the planner can initiate a contract request by navigating to the **Contracts** tab on the schedule.

1. Select the **Media Owner**, enter a **Contract Description**, and save the line.
2. Open the **options menu (⋮)** on the contract line and select **Request Contract**.
3. The contract request generator will open, allowing the user to:
   - Select a **contract template**
   - Choose an **internal authoriser**
   - Upload an existing Excel schedule **or**
   - Generate a schedule using a **pivot report** based on selected plan lines
4. To generate a schedule, select the relevant plan lines and choose **Preview**.
5. Once the schedule is attached, select **Save & Request Authorisation**.

An email is sent to the selected internal authoriser containing the contract request and schedule.

Receiving & Authorising the Contract Request

The authoriser receives an email containing:

- The contract request document
- The associated Excel schedule

By selecting the **Authorise** link, the authoriser can approve or reject the request.

Requesting the Vendor Contract

Once the contract request has been internally authorised:

1. The planner receives an email confirming the authorisation status.
2. Navigate to the plan’s **Detail** tab and select **Authorisations**.
3. Open the **options menu (⋮)** on the relevant line and select **Request Vendor Contract**.
4. Enter the vendor’s email address and optionally include a message in the **Custom Content** field.

Receiving the Contract Request

The vendor/Media Owner receives an email requesting the contract, with:

- The authorised contract request document attached
- Clear instructions on next steps

The vendor returns an **unsigned contract**, which automatically uploads to the contract line item in the **Authorisations** section of the plan.

Sending the Contract for Internal Signature

The planner/requester reviews the uploaded vendor contract and selects **Request Internal Signature**, sending it to the authoriser for review and signing.

Approving & Sending the Contract for Vendor Signature

The authoriser:

1. Receives an email requesting approval and signature.
2. Downloads, reviews, and signs the contract.
3. Selects **Request Vendor Signature** from the email link.
4. Uploads the signed contract and selects **Proceed**.

The system emails the signed contract to the vendor for final signature.

Vendor Signing the Contract

Both the vendor/Media Owner and planner/requester receive an email requesting the vendor’s signature.
The vendor signs the contract and returns it via email, which automatically attaches to the plan.

Completing the Contract Flow

The planner reviews the final signed contract and selects **Confirm Contract** from the options menu. This action finalises the contract process.

Updating Digital Signatures for Authorisation

Users authorised to approve contracts must upload a digital signature.

1. Navigate to **My Profile** from the dashboard.
2. Select **Update My Profile**.
3. Upload a signature and initials.
4. Select **Update** to save.