

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.

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