

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 (S)**.
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.

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