CONTRACT REQUEST

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1. Dashboard

The dashboard of the contract request appears to all the legal users when a request is generated from the sales team. For a particular request, only a single user can work on that and it totally depends on the priority order. All the demographics are present on the Request Details section.
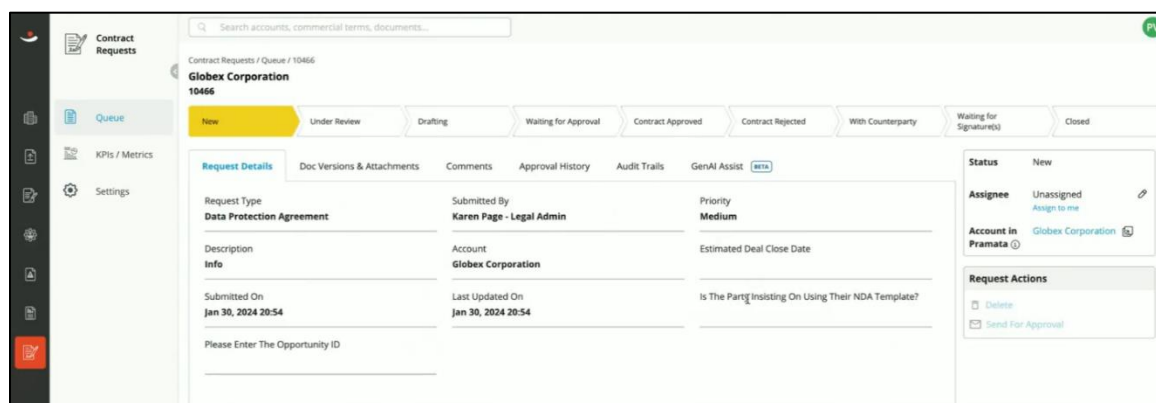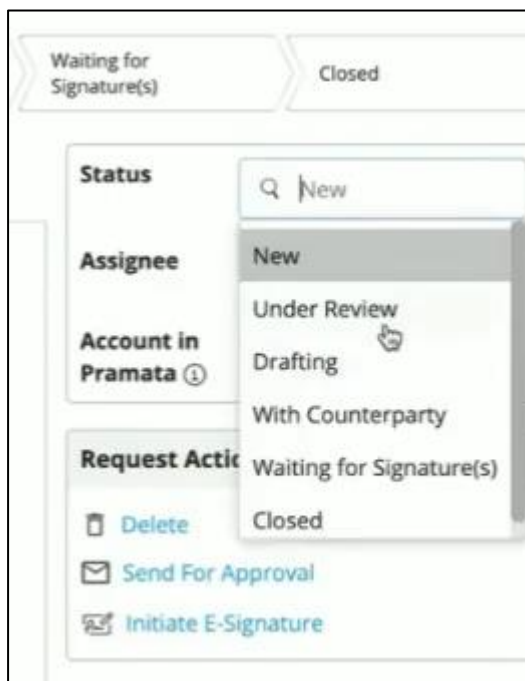

2. Assigning

Once the request order is opened by a single user, then the user needs to change the Assignee name from 'Unassigned' to their name. So, the contract request will be under that user's belt. Since it is a new request, the status will be showing as 'New'.
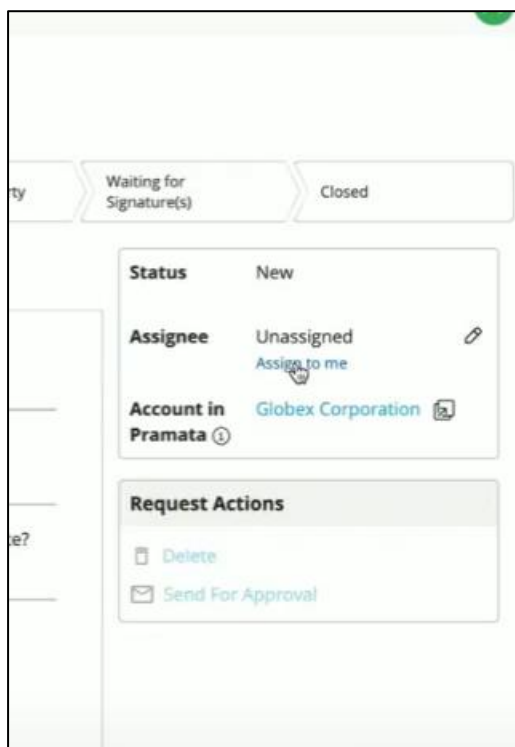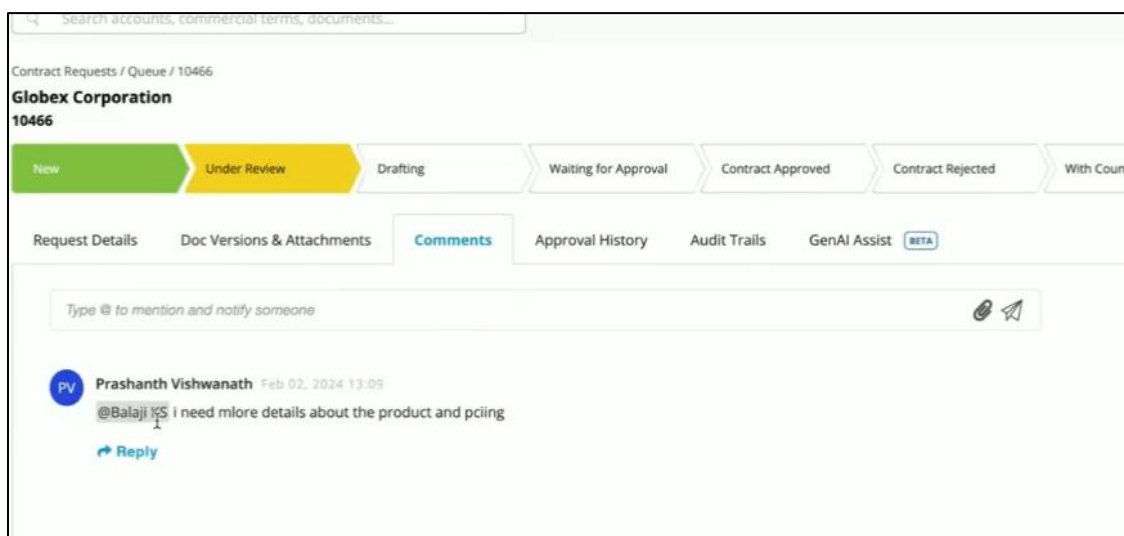
3. Status Change

The user can change the status according to their work and their needs.
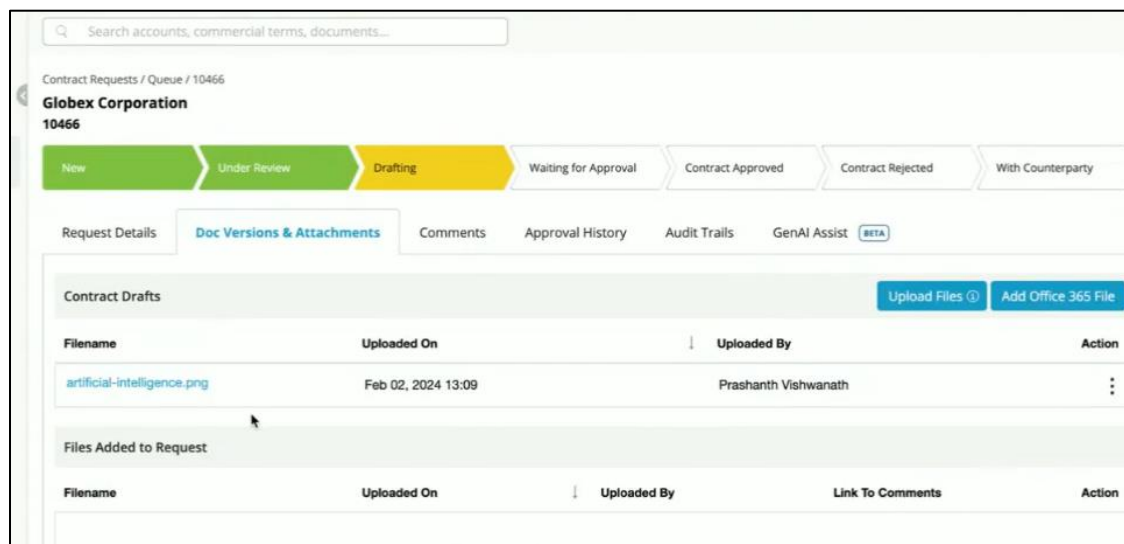

4. Drafting

4.1   Comments section

The user can mention someone in the comments and even they can attach any type of documents over there to get it reviewed.
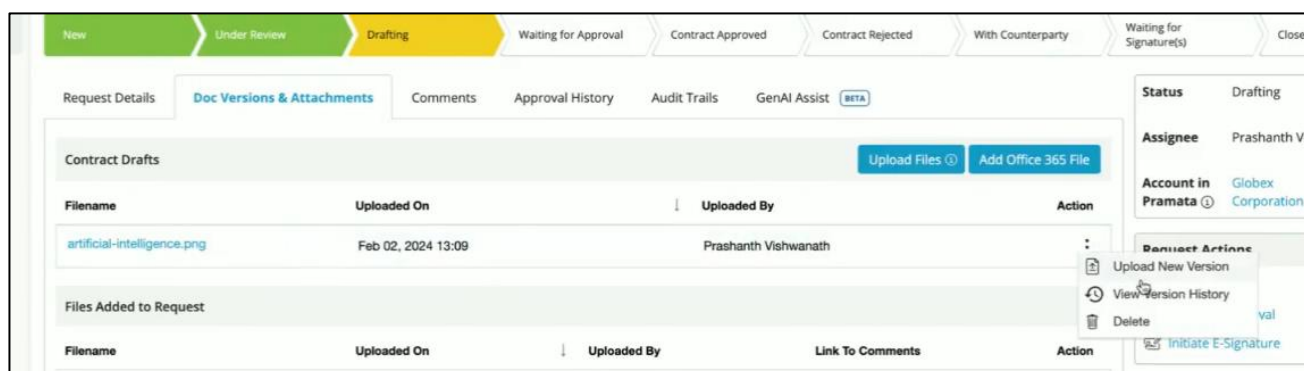
4.2   Doc Versions & Attachments

The status gets changed automatically to the drafting mode or the user can change the status at regular intervals. Here, under doc versions and attachments, the files can be attached.
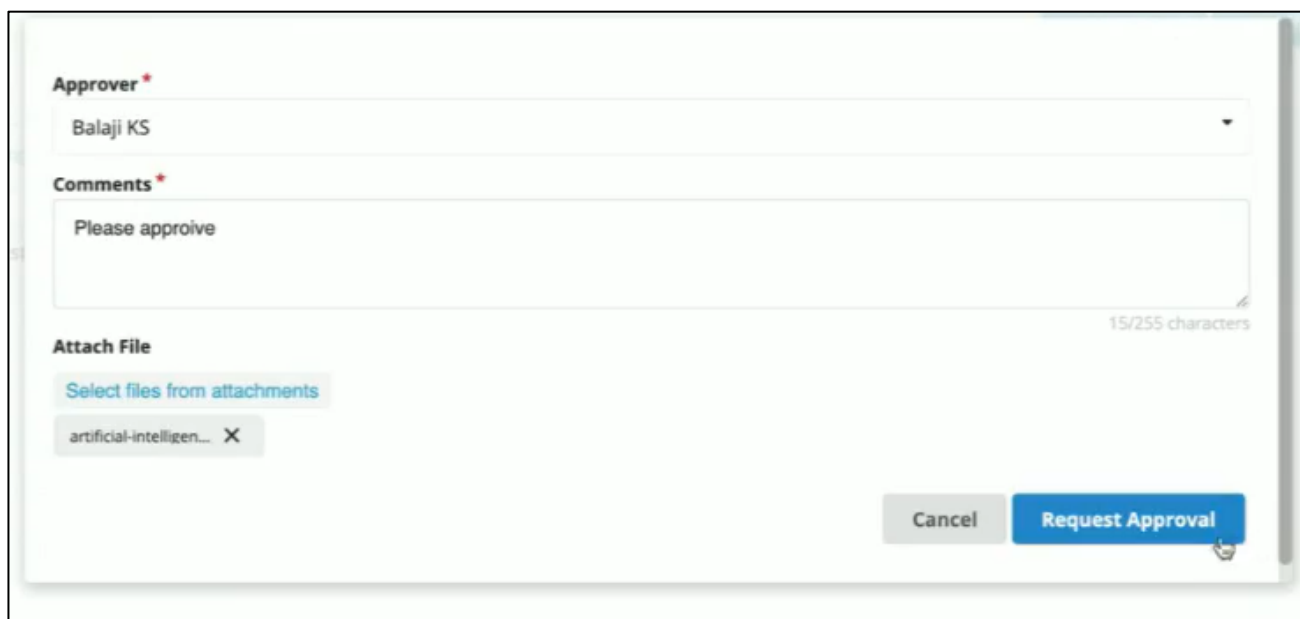

4.2.1 Upload Files

Once the file is uploaded, it can be modified by uploading a newer version of it or it can be deleted permanently.

4.2.2 Request Approval

It will ask for the Request approval to check on the uploaded document.
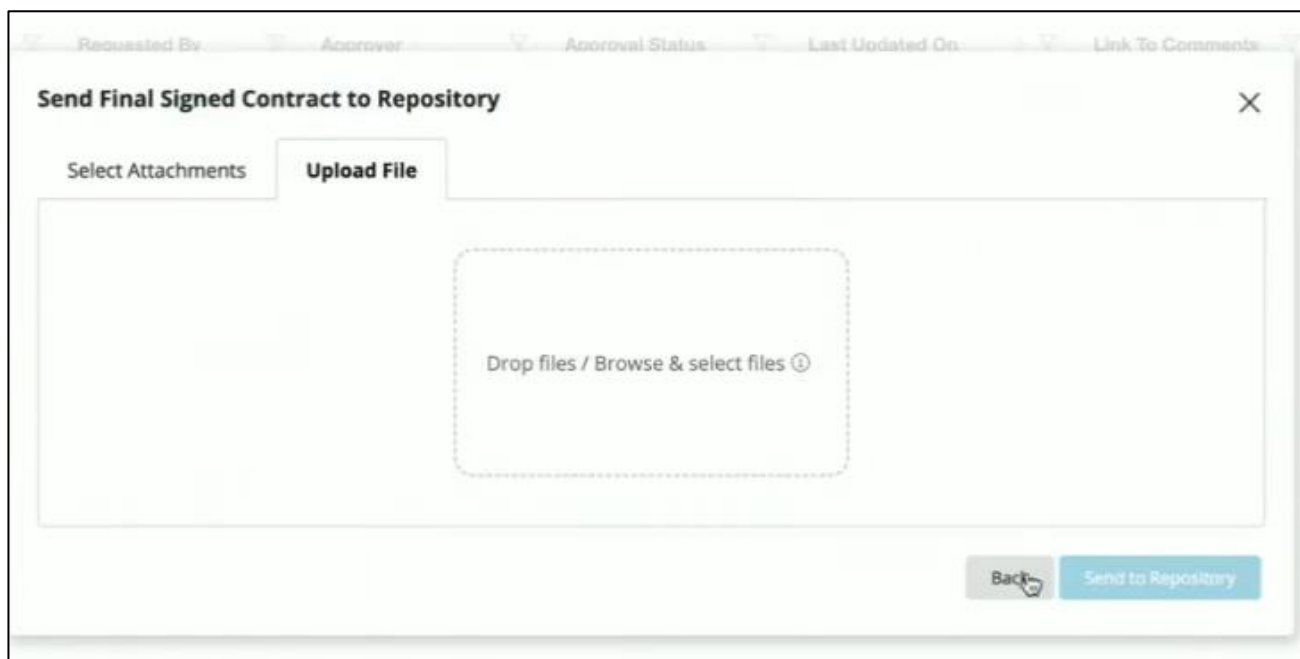

5. Closing Request

The request can be approved or rejected by the approver depending on certain circumstances. Let us assume that it has been approved. So, the next step is to close the request from the user end. When the user changes the status to Closed, then this screen will appear as shown below.
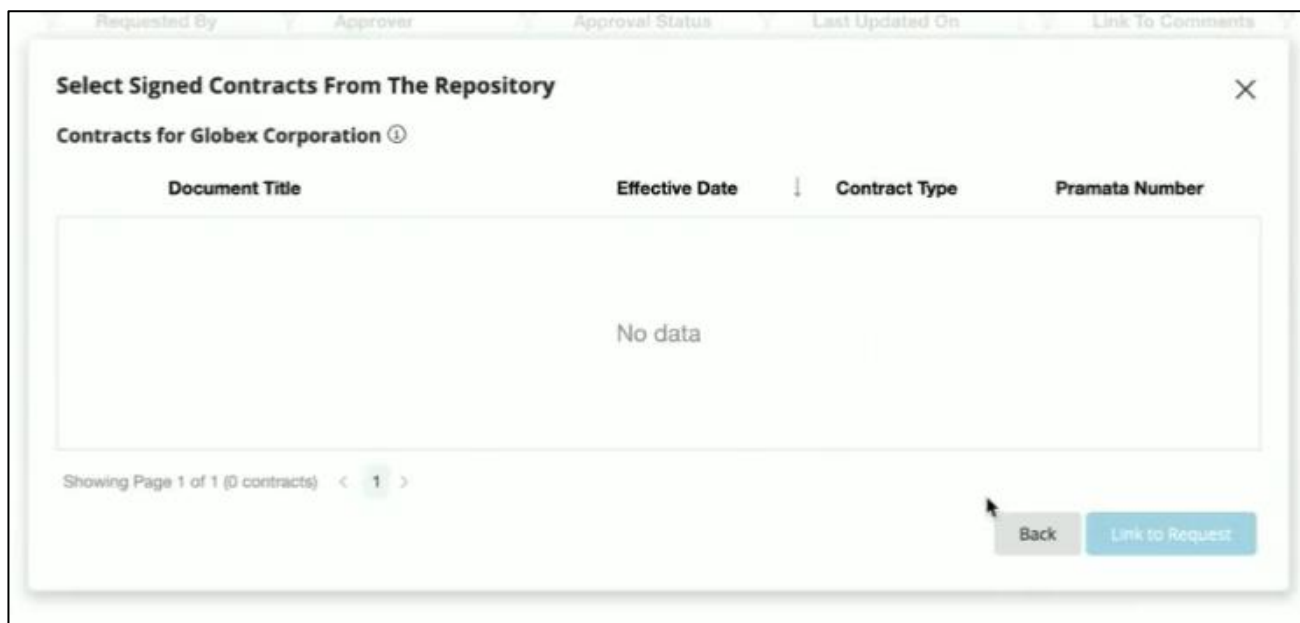
5.1   To Repository

The user can upload the new signed document here to the repository.

5.2   From Repository

If there are already signed documents present in the repository, the user can mention it by providing the document title.

5.3   Not Applicable

And if there are no relevant signed documents present, user can select the 'Not Applicable' option and need to provide a reason to close the request.

Provide Reason   ✕

Add Reason *

⌶

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