

Contract Requests Table

In the Navigation Menu, this table appears as My Contract Requests.

This table provides a simplified interface for Contract Requesters to create and request Contracts. It also contains a built-in self-serve workflow, so Requesters can use pre-approved contract templates to generate contracts and send them for eSignature without needing to involve the Legal Team. To fully use the self-serve workflow, the user must also be assigned to the appropriate DocuSign User or Adobe Sign User group.

Each record in this table is kept in sync with an associated record in the Contract table.

Creating Contract Requests

Members of the Contract Requester group can create new records in this table. The user is guided through a series of steps, with each step being on a new tab. You'll begin on the Basic Details tab.

Basic Details Tab

On the first tab of the record, the user enters basic details about the contract, including:

- Whether it is a child contract, amendment, or a completely new contract
- Contract Type
- Details about the Internal Entity and Counterparty
- Whether the contract is on internal paper or third-party paper

Background rules then evaluate whether the user must submit the Contract Request for review by the Contract Management Team, or if they can use the self-serve workflow to complete the Contract Request by themselves. By default, the self-serve workflow is available if the two following conditions are met:

1. The selected Contract Type is configured to allow self-serve.
2. The user selected pre-approved contract template as the document source.

Additional Details Tab

If the user must submit the Contract Request for review, they are provided an open-text field to add any notes they want the Contract Management Team to review, as well as a file field where they can upload one or more documents. Once the user has entered the necessary details, they click a "Submit for Review" button. This sets the status to Submitted for Review. From here, a member from the Contract Manager group takes over for approval and execution. The Contract Requester is notified once the Contract has been executed, or if it has been denied.

If the self-serve workflow is available, the following choices presented to the user change. If not, the workflow ends here.

- **Contract Term and Renewal:** Includes various additional options for renewal type, contract start and end dates, and other details related to contract term. However, these options can be locked down by choosing the appropriate option in the Contract Type record so that the user may not change the default values.
- **Document Template:** Includes a list of available document templates that can be selected by the user. The selection of particular templates may also present the user with additional options. These options are configured in the Document Template record.

Send for Signature Tab

This tab is only available in the self-serve workflow.

The user can select up to two external signers and one internal signer. For the external signers, the user can either pick from the People table, or manually enter details such as their names, emails, and titles. The internal signer must be picked from the existing list of Employees. The user can then create either a DocuSign Envelope or an Adobe Sign Agreement. With either option, the user is navigated to the associated eSignature provider, from where they can review details and send the contract out for signature. Once all parties have signed, the Contract Request status is set to Executed. If any signer declines, the Contract Request status is set to Draft. In either case, the Contract Requester is notified by email.

Send Email Tab

This tab is only available in the self-serve workflow.

If the user wants to email the contract document to the counterparty for review before sending it for signature, they can use this tab. They can either use a pre-defined email template, or manually enter an email subject and body. They can choose multiple internal and external recipients from the People table, as well as enter additional addresses manually. The user can also attach the contract document to the email.

The entire communication history for each record is displayed in a table of communications. Incoming email text is stored in an append-only field called Response Summary, and incoming file attachments are stored in a file field called Communication Files.

Forward for Negotiation Tab

This tab is only available in the self-serve workflow.

Contract Requesters are not allowed to modify contract documents generated during the self-serve workflow. If the counterparty requests changes to the contract document, the user must forward the Contract Request to the Contract Management Team. On this tab, the user can enter notes for the Contract Management Team, and choose whether files stored in the Communication Files field should be forwarded. Once they click a button to forward the Contract Request, the status is set to Submitted for Review. From here, a member from the Contract Manager group takes over and guides the Contract through the necessary steps for negotiation, approval, and execution. The Contract Requester is notified once the Contract has been executed or denied.

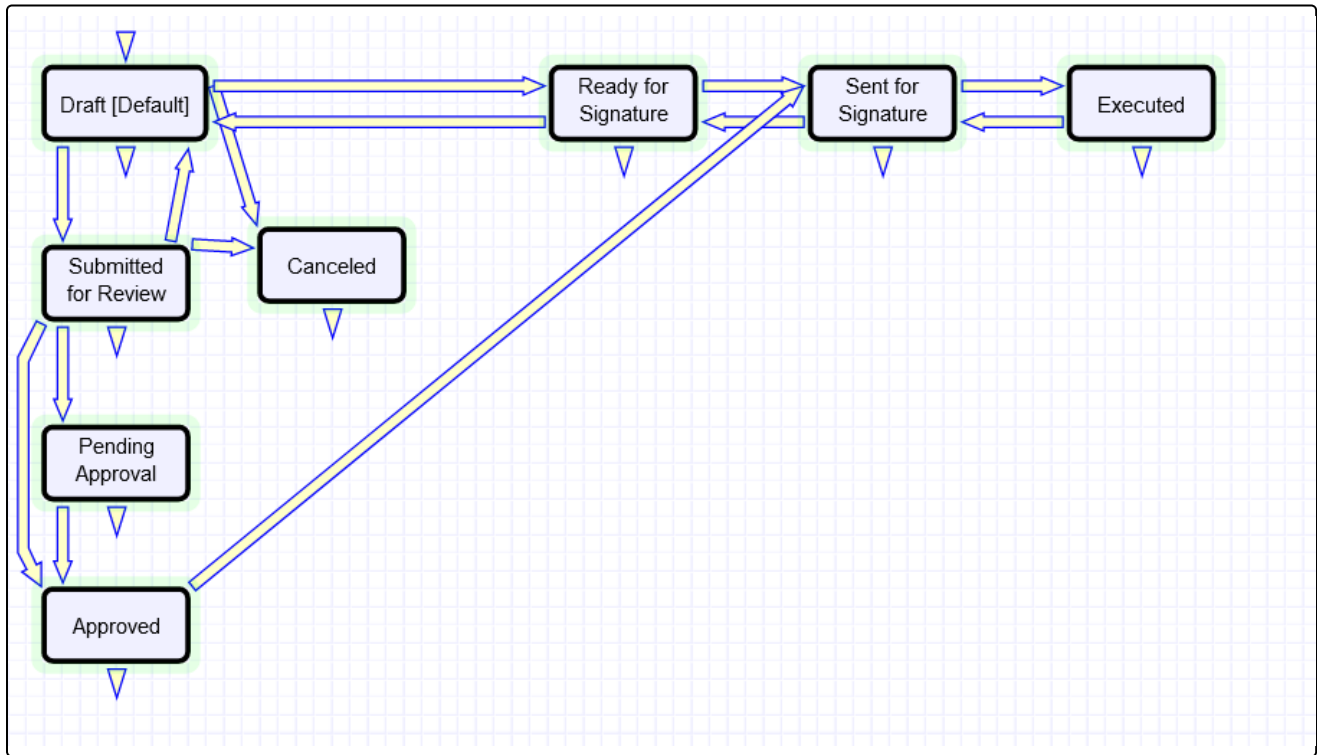
Automation

This table contains the below active rules.

- **Create/Edit: Sync with Contract:** This rule runs on creation as well as after every edit. It runs a conversion action to create/update an associated record in the Contract table.
- **Edit: Handle Status Change Notifications and Updates:** Any record updates or notifications that need to be triggered when the status changes are included in this rule. This primarily handles status changes triggered automatically by other actions/rules, as opposed to changes triggered by a user clicking action buttons.

Workflow

The table has the below workflow:



- **Draft:** This is the default status for all new records.
- **Ready for Signature:** When the user generates the contract document as part of the self-serve workflow, the record is set to this status.
- **Sent for Signature:** When an eSignature envelope is sent, the record is set to this status.
- **Submitted for Review:** This status is triggered when the user submits a Contract Request for review by the Contract Management Team. This occurs either because the self-serve workflow is not available, or the counterparty has requested changes.
- **Pending Approval:** This is for use in Contract Requests where the self-serve workflow is not available. Once a Contract Manager has completed their review and triggered the approval workflow, the record is set to this status.
- **Approved:** This is for use in Contract Requests where the self-serve workflow is not available. Once all Approvers have approved the request, the record is set to this status.
- **Executed:** This is triggered once the contract has been signed by all parties.
- **Canceled:** This is triggered when the Contract Requester chooses to cancel their request.

Ownership

Records in this table are owned by the creator.