Memorandum of Understanding Inbox

Module Guide: Memorandum of Understanding Inbox (MOU Inbox)

Module Location

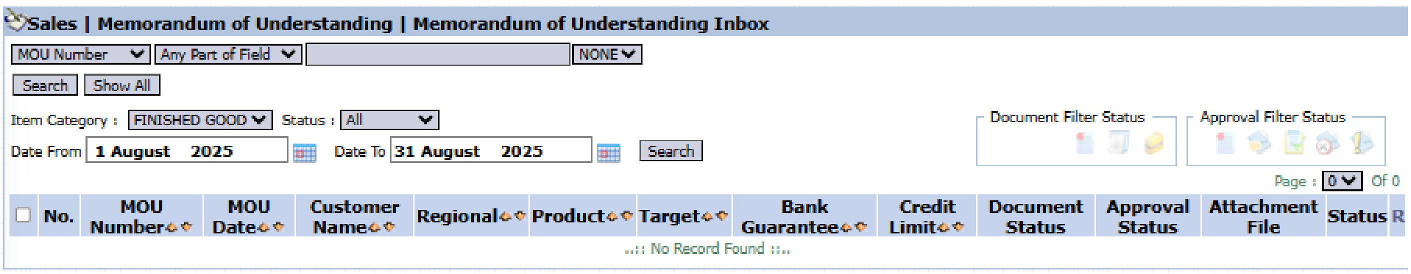
Sales > Memorandum of Understanding > Memorandum of Understanding Inbox

Module Objective

The **Memorandum of Understanding Inbox (MOU Inbox)** module serves as the approval center for all MOU documents that have been created and submitted. This module is used by a superior or manager who is authorized to conduct a final review and provide approval before a cooperation agreement with a customer officially takes effect.

1. Main view (MOU List)

The main page of this module is an "inbox" that displays all MOU documents requiring your action.



View Explanation & Filters

This page provides a summary of all MOUs that are awaiting approval.

- **Filters**: You can search for a specific MOU by **MOU Number**, **Item Category**, **Status**, or a date range (**Date From / Date To**).

- **Request List**: The table below will display all MOUs awaiting action. The table currently shows "...No Record Found...".

Column Explanation

- **MOU Number**: The unique number of the submitted MOU document.

- **Customer Name**: The name of the customer associated with the MOU.

- **Credit Limit**: The proposed credit limit value within the MOU.

- **Document Status / Approval Status**: These columns indicate the status of the approval process.

2. Approval Process Steps

The following is the standard workflow for an approver.

Step 1: Access the Inbox

Open the **Memorandum of Understanding Inbox** module to see the list of MOUs that require approval.

Step 2: Review MOU Details

Click on one of the rows in the table to open its detail view. In the detail view, you can check all the information that has been input, such as the commercial terms, credit limit, targets, and other details.

Step 3: Provide Approval

After you open and review the MOU details in Step 2, you will find the buttons to grant approval (e.g., **"Approve"** or **"Reject"** buttons) **within that detail page**. Click the appropriate button to complete the review process.

3. Workflow & Integrated Business Process

1. **Submission**: A user (e.g., a sales manager) creates a document in the **Memorandum of Understanding** module and clicks **Confirm**.

2. **Entering the Queue**: The confirmed MOU automatically enters the queue in this **Memorandum of Understanding Inbox** module.

3. **Review & Approval**: An authorized manager or leader opens this module, reviews, and provides approval from within the detail page.

4. **Agreement Activation**: After approval, the MOU becomes an active agreement, and the terms within it will be enforced by the system on subsequent transactions with that customer.

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