Sales Contract Inbox

Module Guide: Sales Contract Inbox

Module Location

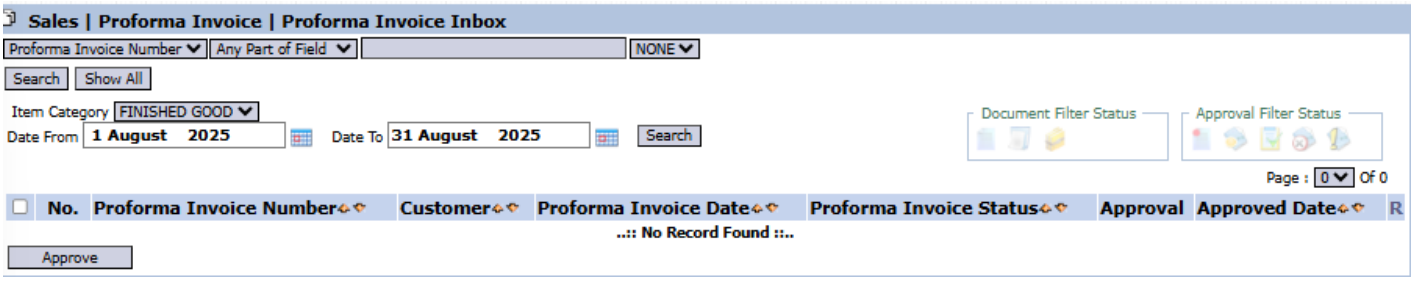
Sales > Sales Contract > Sales Contract Inbox

Module Objective

The **Sales Contract Inbox** module serves as the approval center for all **Sales Contract** documents that have been created and submitted. This module is used by a superior or manager to conduct a final review and provide approval before a contract officially becomes effective and can be used for transactions.

1. Main View (Contract List)

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



View Explanation & Filters

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

- **Filters**: You can search for a specific contract by **Contract Number**, **Item Category**, **Status**, or a date range (**Date**

From / Date To).

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

Column Explanation

- **Contract Number**: The unique number of the submitted Sales Contract document.
- **Customer Name**: The name of the customer associated with the contract.
- **Contract Start Date / End Date**: The start and end dates of the contract period.
- **Approval Status**: An icon that indicates the status of the approval process.

Button Functions

- **Approve**: The main action button to approve one or more selected contracts.

2. Approval Process Steps

The following is the standard workflow for an approver.

Step 1: Access the Inbox

Open the **Sales Contract Inbox** module to see the list of contracts that require approval.

Step 2: Review Contract 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, product list, prices, and the contract period.

Step 3: Provide Approval

After you have reviewed and are certain about the submitted contract's content:

1. Return to the main **Inbox** page.
2. Check the box in the leftmost column for one or more contract rows you wish to approve.
3. Click the **Approve** button located in the bottom-left section of the page to process the approval. 

3. Workflow & Integrated Business Process

1. **Submission**: A user (e.g., a sales manager) creates a document in the **Sales Contract** module and clicks **Confirm**.
2. **Entering the Queue**: The confirmed contract automatically enters the queue in this **Sales Contract Inbox** module.
3. **Review & Approval**: An authorized manager or leader opens this module, reviews, and provides approval.
4. **Contract Activation**: After approval, the Sales Contract 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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