Oracle® Contracts for Sales

Concepts and Procedures

Release 11*i*

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Part No. A95176-01

Oracle Contracts for Sales Concepts and Procedures, Release 11*i*

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Preface

Welcome to the **Oracle Contracts for Sales, Release 11*i***. This Concepts and Procedures provides information and procedures to help you work effectively with Contracts for Sales.

This preface explains how Concepts and Procedures is organized and introduces other sources of information that can help you.

Intended Audience

This guide is aimed at the following users:

- Technical Service Representatives (TSR)
- Customer Service Representatives (CSR)
- System Administrators (SA), Database Administrators (DBA), and others with similar responsibility.

This guide assumes you have the following pre-requisites:

1. Understanding of the company business processes.
2. Knowledge of products and services as defined by your marketing policies.
3. Basic understanding of Oracle and Developer/2000.
4. Background in SQL, PL/SQL, SQL* Plus programming.

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Structure

This manual contains the following chapters:

Chapter 1 Understanding Contracts for Sales

This chapter provides overviews of the application and its components, explanations of key concepts, features, and functions, as well as the application's relationships to other Oracle applications.

Chapter 2 Using Contracts for Sales

This chapter provides process-oriented, task-based procedures for using the application to perform essential business tasks.

Chapter 3 Implementing Contracts for Sales

This chapter provides the procedures for setting up profile options, lookup codes, and Workflow required to implement the integration successfully.

Related Documents

For more information, see the following related documents:

Oracle Contracts Core Concepts and Procedures Release 11i

Oracle iStore Implementation Guide Release 11i

Oracle CRM Foundation Implementation Guide Release 11i

Conventions

The following conventions are used in this manual:

Convention	Meaning
. . .	Vertical ellipsis points in an example mean that information not directly related to the example has been omitted.
. . .	Horizontal ellipsis points in statements or commands mean that parts of the statement or command not directly related to the example have been omitted
boldface text	Boldface type in text indicates a term defined in the text, the glossary, or in both locations.
< >	Angle brackets enclose user-supplied names.
[ ]	Brackets enclose optional clauses from which you can choose one or none.

1

Understanding Contracts for Sales

This topic group provides overviews of the application and its components, explanations of key concepts, features, and functions, as well as the application's relationships to other Oracle applications.

1.1 Oracle Contracts Suite Overview

Contracts for Sales

Oracle Contracts for Sales has "Contracts Core" functionality (i.e. Launchpad, Authoring, Execution, and so on) plus integration to Oracle iStore, Oracle Order Capture, and Oracle Order Management. Oracle Contracts for Sales allows users to automate their sales contracting process. Contracts for Sales assists a company in enhancing its customer interactions by incorporating contract management into the opportunity-to-cash business flow. Oracle Contracts for Sales takes advantage of existing Oracle sales management applications such as Oracle TeleSales, Sales Online, and iStore to complete the quote-to-contract-to-order flow.

Contracts Core

Contracts Core is designed for any company in any business that requires contracts independent of or in support of buying and selling activities.Whether the organization is the buyer or the seller, whether it issues contracts or receives them, Contracts Core automates the full life cycle of a contract.

You can author, execute and control non-industry specific contracts with Contracts Core, for both buy and sell contracts. It helps companies manage internal and external obligations, control daily deliverables, and be focussed on contractual goals. To ensure that you receive everything you negotiated for and provide everything you committed to delivering, Contracts Core helps track "hidden" deliverables enforceable requirements that may not be listed as a line item in a contract, but are described in terms and conditions.

The Contracts Core module acts as a central repository for the collection and dissemination of contract information. It contains all data on terms and conditions, deliverables, and parties to the contracts. This repository is the key to provide a single source for all the information in any contract in your enterprise.

Contracts Core provides foundation functionality that other contracts modules may use, including Contracts for Sales, Contracts for Service, and Contracts for Rights. This common functionality includes renewing or extending a contract, requesting a contract change, managing contract deliverables, and many others. You can record, group, organize, query contract data, and set up an automated approval process for your contracts.

For more information regarding features and functionality for Contacts Core see, *Oracle Contracts Core Concepts and Procedures.*

Contracts for Service

Oracle Contracts for Service enables you to create and manage service contracts, warranties, and extended warranties, providing visibility to contract entitlements and acting upon contractual commitments within the contract.

Warranties and extended warranties are service contracts. When a customer orders a product that has an associated warranty or the customer orders an extended warranty with the product, Contracts for Service automatically creates the warranty contracts based on the information from the sales order. When products are returned, replaced, upgraded, or transferred, the warranty and extended warranty are updated appropriately. In addition to defining service line items in your contract, Contracts for Service enables you to define usage line items. For example, if a customer is renting a photocopier, the business can charge either on a per-copy basis or a fixed price. The business may set a minimum charge and vary the price depending on volume. Contracts for Service supports bill settlement, invoice averaging, and billing profile definition. Contracts for Service can receive physical counter readings from the installed base to determine the usage amount for actual billing.

For more information regarding features and functionality for Contacts for Service see, *Oracle Contracts for Service Concepts and Procedures.*

Contracts for Rights

Contracts for Rights addresses the business needs for the “Business Rights Management” domain. Business Rights Management is the systems and processes related to the acquisition and licensing of intellectual property. Business Rights Management processes are used to manage contracts and financial transactions captured in the contracts related to the acquisition and/or licensing of rights associated with intellectual properties used or created by a company or individual.

Contracts for Rights was initially released for 11.5.4. Contracts for Rights offers an integrated approach to manage intellectual property and related rights which are represented by contracts. It provides users with a property catalog to capture meta information about intellectual property and to categorize and locate it in a centralized secure repository. It also provides users to ability to capture the rights to properties which are added through the contracts module.

For more information regarding features and functionality for Contacts for Rights see, *Oracle Contracts for Rights Concepts and Procedures.*

Contracts Intelligence

Contracts Intelligence converts contracts data into contracts business knowledge and helps businesses to make informed tactical and strategic decisions. The primary integration point for this product is the contracts family. All data populated in Contracts Intelligence is based on the transactional data from Oracle Contracts.

Contracts information is displayed in bins such as:

- Performance Measures
- Expired, Not Renewed
- Renewals by Status
- Forecast by Organization

For more information regarding features and functionality for Contacts Intelligence see, *Oracle Contracts Intelligence Concepts and Procedures.*

1.2 iStore Integration Overview

The integration with iStore helps users who sell products and services through iStore by managing and coordinating the creation of a sales contract. This integration enables:

- Standard terms and conditions displayed through iStore.
- A active contract is created upon acceptance of the terms and conditions.
- An entered contract created when the customer does not accept the standard terms and conditions.
- Viewing new negotiated terms and conditions through iStore.

1.2.1 iStore Shopping Cart Scenario

iStore allows customers to order items using a browser. Through the store the customer selects products, support, etc. iStore creates a quote with the customer's selection. Once the customer finishes shopping he/she reviews the standard agreement. If the customer agrees with the standard agreement, he/she submits the order and iStore creates a sales order from the quote. You can set the system to then automatically create a contract with standard terms and that is approved and signed.

In cases where the customer does not agree with the standard agreement, iStore allows the you to specify the changes in a text field. iStore automatically triggers the contract creation based on a contract template for the standard agreement. The customer's requests are stored as notes in the Interaction History module. An "entered" contract is automatically created, and a notification is sent to the sales representative and to the contract administrator. The quote is locked after the contract is created.

The contract administrator helps to determine which standard options to use in place of the standard agreement. The contract administrator drafts and approves the contract. Depending on the contract dollar amount, the contract administrator may need to submit the contract for a business approval. The sales rep. is notified when the contract receives a final approval.

Approved contracts are locked for changes until they are signed by the customer. The approved contract, implicitly signed by the supplier, is posted on the web for customer review.

The customer has to access the Store to review and sign the new contract. The quote and the contract are unlocked once the contract is signed. The customer proceeds to the checkout once he accepts the new terms and conditions, and an order is created.

1.2.2 Telesales and Sales Online Scenario

The telesales agent or a sales rep. creates a quote on behalf of the customer. The quote contains products, pricing and shipping details. Once the quote is completed the agent or the sales rep. prints the quote with the standard terms and conditions. The sales rep. chooses a contract template that is linked to the quote. The sales rep./agent sends the quote to the customer for approval.

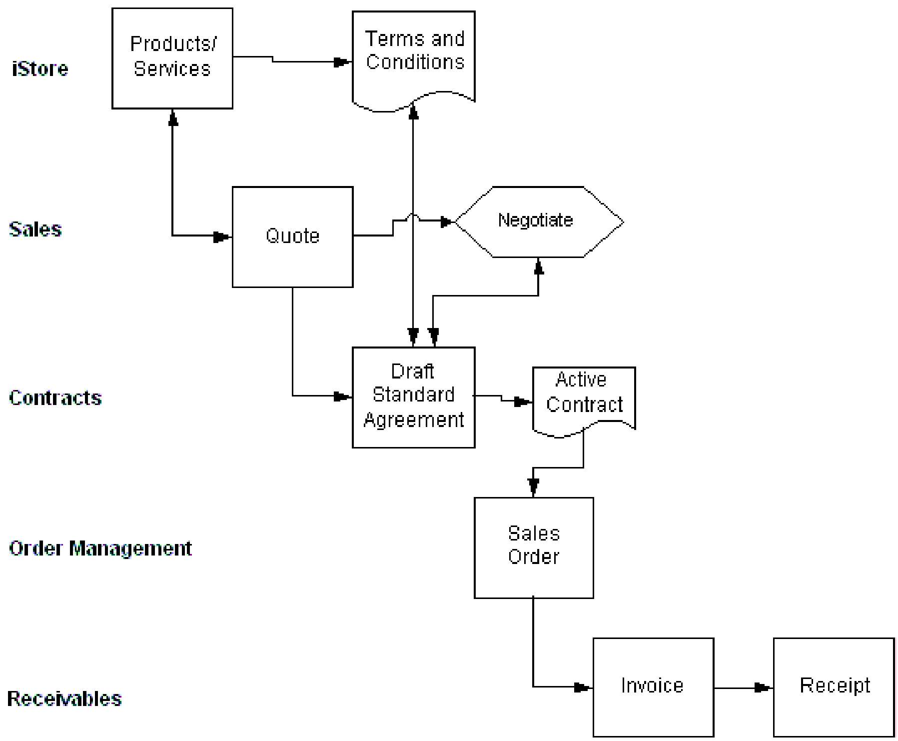
The sales rep./agent creates the contract from the quote. When the customer accepts the quote and the standard terms and conditions a contract can be created as “approved and signed” when the sales rep. places the order.

When the customer does not accept the quote and/or the standard terms and conditions a contract is created in “entered” status. The contract administrator and the sales rep. are notified when the contract is created. The contract administrator updates the contract based on the requirements described in the Interaction History. Once the changes are incorporated, the contract is submitted for approval.

The sales rep. and contract administrator receive a notification about the contract approval. After the approval the system updates the quote to reflect the latest changes to the contract. The negotiated contract is now printed and sent to the customer or published in iStore. The customer needs to sign the contract or accept it from the web. If the customer does not accept the contract and does not want to perform further negotiation the contract and the quote are canceled. Otherwise, the contract is signed and the sales rep. can place the order.

1.2.3 Contracts/iStore Integration Flow

The following diagram illustrates selling products and services when a contract is required:


iStore
Sales
Contracts
Order Management
Receivables
Products/ Services
Terms and Conditions
Quote
Negotiate
Draft Standard Agreement
Active Contract
Sales Order
Invoice
Receipt

1.3 Order Capture Integration Overview

You use Oracle Contracts for Sales to perform the following processes:

Contract Creation from Quote

Sales Order Creation from Contract

Create Contract from Order

1.3.1 Contract Creation From Quote

This functionality supports the creation of a contract from a quote. When a quote is created in Order Capture, a process can be initiated by you to create a contract in entered status. All relevant information from the quote, including lines and pricing details, party information, and shipping and billing information, are passed to the contract.

In this scenario, a user could create a contract directly from a quote. This scenario is possible when a customer does not agree to the standard terms and conditions offered in the quote, and requires additional or revised terms and conditions, or when a sales rep. requires additional flexibility when negotiating a deal. A contract can be created from the quote, and used as the primary negotiating tool.

All required information is entered in the quote, item information is added to the cart, and the quote is saved. The user can then create a new contract, picking from a list of contract templates. The contract is created in “entered” status, and the quote number this contract was created from is referenced in the contract.

1.3.2 Sales Order Creation From Contract

Contract Administrators may require the ability to create an order directly from a contract, rather than from a quote. Additionally, when you create a contract from a quote, and use the contract as the primary tool for negotiations, the outcome would be to either cancel the contract, or create an order from the contract.

This integration enables you to create a standard order from an “active” contract. A new Concurrent Process is added, called “Order creation from Contract”. Once initiated, you are prompted to provide the contract number from which to create an order. The new order contains all relevant information from the contract, including customer, shipping, and billing details, and line item, quantity, and pricing details. The new order is created in “entered” status. The contract is updated to include the new order number.

1.3.3 Create Contract from Order

Order Management sells products and services that may need a contract to be setup between more than one Parties. In Typical Business Scenario, a Sales Contract is created before order is placed. It contains the terms and conditions for the items being bought, and needs to be approved by the supplier and signed by the customer before booking the Order. Most of the time the supplier (i.e. the merchant) has pre-defined standard terms and conditions that are used to create a contract automatically. If the Customer (i.e. the Buyer) agrees then order is placed. If not, then the contract needs to be negotiated between the customer and the supplier’s contract specialist. Once both parties agree, the order can be placed.

However there is a need to create a Sales Contract from already fulfilled orders so that all existing paper contracts in an organization can be stored in Oracle Contracts. This provides online access to all the Contracts which were signed/agreed upon before placing the order. This will also help them generate more revenues by identifying the contracts that can be renewed and thus will create more business opportunities. This integration gives contract users the facility to migrate existing fulfilled Orders to Sales Contracts which helps manage business in a profitable and efficient manner.

2

Using Contracts for Sales

This topic group provides process-oriented, task-based procedures for using the application to perform essential business tasks.

2.1 Using Quotes and Sales Orders

Use these procedures to perform the following:

- Creating a Contract From a Quote
- Creating a Sales Order From a Contract
- Creating a Contract From an Order

2.1.1 Creating a Contract From a Quote

Use this procedure when you want to create a contract from a quote in Oracle Order Capture.

Prerequisites

A contract template must be setup as follows:

- Contract for Sales as category
- Contracts Manager or Sales Contract Manager responsibilities defined for the category with Access “Modify”.
- Status and Operations setup for the category
- Party roles defined

For the procedure on creating a template see, *Oracle Contracts Core Concepts and Procedures*.

The System Profile Option "OKC Default Contract Group" should be set to the Contract Group where the created contract is to be placed.

Steps

1. From the Order Capture Sales Manager Navigator, choose **Order Capture.**
2. Enter the account
3. Enter the item.
4. Repeat steps 3 and 4 for additional items.
5. Select a bill to address.
6. Select the "Ship to Same Address" checkbox.
7. Click **Add To Cart**.
8. Click **Save Quote**. A quote number is generated.

9. **(N) Actions > Create Contract**.
10. From Contract Template window, select a template and click **OK**.
11. Switch responsibilities to **Sales Contract Manager > Launch Contracts > Contract Navigator.**
12. Find the new contract within the appropriate Contract Group.
13. Verify within the contract summary tab the text “Created from quote number xxxxx,version x” appears in the Short Description field. Lines, pricing, and rule information from the quote should populate the new contract (Status should be “Entered”).
14. Continue the contract authoring and approval processes.

To create an order from this contract, please see the next procedure *Creating a Sales Order from a Contract*.

2.1.2 Creating a Sales Order from a Contract

Use this procedure when you want to create a sales order from a contract.

Prerequisites

An “Active” contract must be used with the following:

- Contract for Sales as the category
- At least one line
- Sell as the intent
- Issue as the perspective
- Belongs to operating unit of the responsibility user is logged in

For the procedures on creating, authoring, and approving contracts see, *Oracle Contracts Core Concepts and Procedures.*

Note: The contract must not have been created from iStore. Also if the contract was created from a quote, no order cannot be created.

Steps

1. From the Navigator select **Control** > **Requests** > **Run**.
2. Select “Order Creation from Contract” for request name.

3. Select the Contract for Sales as the category in the Parameters window.
4. Select the Contract Number and click OK.
5. Click Submit and note Request ID number.

To view completion of the request, open the Completed Requests window by doing the following:

6. **(N) Control > Requests > View**.
7. If request was completed, proceed to next step. If not completed, click Request Log to view the report. Identify and fix errors and repeat steps 1-7.

To view the order details, open the contract authoring window.

8. **(N) Launch Contracts > View > Find.**
9. Enter Contract Number and click Search.
10. Right click contract and select Open.
11. View the order creation information in Comments region of the Summary tab.

To view details in Order Management, open the contract execution window.

12. From the Navigator, **click Open (T) Contract Navigator.**
13. Locate contract and right click mouse to select Execution.
14. Select Related Objects tab.
15. Select Order: xxx from the tree.
16. Click Details. You can view the sales order details. You cannot make any updates in the read-only mode.

2.1.3 Creating a Contract from an Order

Use this procedure to create a contract from an order.

Steps

1. From the Navigator select **Control > Requests > Run**.
2. Select “Create Contract from Order” for request name. The Parameters window appears.
3. Select the appropriate sales order.
4. Select the Customer Name. If a customer name is not selected, then contract creation will be done for all customers.

5. Select the appropriate template.
6. Click OK.
7. Click Submit and note Request ID number.

To view completion of the request, open the Completed Requests window by doing the following:

8. **(N) Control** > **Requests** > **View**.
9. Click View Log to review details.
10. Click View Output to see list of contracts created or Exception Report.

2.2 Using Contracts and iStore

The following procedures can be used when Contracts is integrated with iStore:

- Customer Agrees to Terms and Conditions
- Customer Disagrees to Terms and Conditions
- Merchant Updates Terms and Conditions
- Customer Agrees to Updated Terms and Conditions
- Merchant Verifies Details

2.2.1 Customer Agrees to Terms and Conditions

This procedure is used by the customer for selecting items for purchase, registering (if new user), and when he/she agrees with the terms and conditions of the contract.

Steps

1. Log in to iStore.
2. Choose a specialty store.
3. Browse and select to purchase items by placing the items in a cart. Click **Add to Cart**. The Shopping Cart window opens
4. Review the items in the cart and the pricing information.
5. Click **Checkout.**
6. Enter User name and Password at the Sign In window. If you're a new user, complete the following:
   a. Complete the new user registration. The mail address specified is used to notify you in the event the terms and conditions have been changed and are ready to be reviewed.
   b. Complete Shipping Information.
   c. Click **Continue**.
   d. Enter Payment and Billing information.
   e. Click **Continue.**
7. Select **Review Terms and Conditions.**

8. If you agree with the Terms and Conditions, click **I agree - Continue Checkout.** An order is created and a contract with status of "Active" is tied to this order. If you disagree, proceed to the next section "Customer Disagrees to Terms and Conditions".
9. Click **I agree to Terms and Conditions. Place Order.** An order is created and a contract with the status of "Active" is tied to this order.

2.2.2 Customer Disagrees to Terms and Conditions

This procedure is used by the customer in the event he/she does not agree with the contract's terms and conditions.

1. If store and item not selected, follow steps 1-7 listed in Customer Agrees to Terms and Conditions.
2. If you disagree to the contract terms and conditions, click **I disagree - Need Assistance.**
   a. Choose one of the following (Either way, an e-mail notification will automatically be sent to the sales representative, notifying them you have disagreed to the standard terms and conditions of the contract, and need assistance):
      – "I know my sales representative's contact information". Please send this change request.
      – "Please route this change request to my sales rep.; I do not have the contact information".
   b. If you selected the first option, enter the Sales Rep. e-mail address.
3. Enter a cart name in the Save Your Cart field.
4. Enter text describing why you do not agree to the standard terms and conditions, or why you need additional help with your order.
5. Click **Submit Request.** A contract in "Entered" status is automatically created. This contract is created from a contract template. The Request Confirmation window opens. This portion of the customer interaction is complete.

2.2.3 Merchant Updates Terms and Conditions

The Sales Representative would receive an e-mail notification regarding the customer's account status, in this case, the customer did not agree with the standard terms and conditions, and is requesting assistance with the order. The Sales Representative would speak with the Contract Administrator about changing the terms and conditions of the contract per the customer's request.

The Contract Administrator would also receive a notification regarding the new contract that was created relating to this customer.

Steps

1. From the Contracts responsibility, **(N) Launch Contracts > (T) Launchpad.** Right click the Inbox, and choose Find from the pop-up menu. Select Notification Type of Contract Alert.
2. Click **Find.**
3. Select the notification regarding the new contract created for this specific customer. Click **Respond**.
4. Select the Subject link in the Worklist to view the Notification Details.
5. From the Launchpad, select the **Contract Navigator** tab.
6. Find the contract.
7. Double-click the contract to bring up the Contract Execution window.
8. Select the **Communications** tab.
9. Find and highlight the interaction.
10. Click **Open** to view customer interaction.
11. View the details of the interaction for the customer’s comments.
12. Click **OK.** Close the Execution form.
13. From the Contract Navigator, right click the contract number and select Open. Notice from the contract Summary tab, the status is “Entered” and the quote number from iStore has been included.
14. Select the Parties tab and notice the Customer name has been populated from the customer interaction from iStore. Lines in the Line Items tab have also been populated from the customer shopping cart.
15. Select the **Articles** tab.
16. Select the appropriate article to change.
17. Click **Show Text**.
18. Edit the article according to the customer’s requirements.
19. Click **OK**.

20. Click **Submit for Approval.** The QA Results window will show whether the test was completed successfully.
21. If all checks succeeded, click **Continue Approval.** A window will appear with the message, “Process Started Successfully.” Click **OK**. Another window will appear with the message, “The process Approval Process is active for this contract. You cannot change this contract.” Click **OK** and close the contract. The person who is set up as the Contract Approver will get a notification of this pending approval.
22. Navigate to the Launchpad tab Inbox region and click **Find** to search for Contract Approval notification.
23. Select the contract from the list.
24. Click **Respond.**
25. Click **Approve** and close the Worklist.

2.2.4 Customer Agrees to Updated Terms and Conditions

Upon contract approval, the customer will get an e-mail notification that the terms and conditions have been changed and are available for review.

Steps

1. Log in to iStore.
2. Click the **Shopping Cart** icon. The Saved Carts window will list all existing saved carts.
3. Select the cart name that has a contract number attached with a contract status of “Approved”.
4. Review the order details again.
5. Click **Checkout**. The Review Order Details And Confirm window appears.
6. Select Review terms and Conditions to review the modified terms and conditions.
7. Click **I agree-Continue Checkout**. The Review Order Details and Confirm window appears.
8. Click **I agree to Terms and Conditions. Place Order** This will place the order. The Order Confirmation window displays the new order number for this order.

2.2.5 Merchant Verifies Details

After customer has placed the order, the merchant can verify the details of the contract.

Steps

1. From the Navigator, find the contract.
2. Right click the contract and select Open.
3. Review the following:
   - Contract status has changed to Active
   - Date Signed field has been populated.
4. From the Navigator, right click the contract and select Execution.
5. Select **Related Objects**
6. View the Quote Number and Order Number details.
7. Close the contract.

3

Implementing Contracts for Sales

3.1 Implementing Contracts

This topic group provides general descriptions of the setup and configuration tasks required to implement Contracts for Sales successfully.

3.2 Setting Up Contracts for iStore Integration

Setting up the integration for Contracts and iStore consists of the following tasks:

- Setting Up Profile Options for Integration
- Verifying Workflow Setup
- Setting Up Personnel

3.2.1 Setting Up Profile Options for Integration

3.2.1.1 Contract for Sales Profile Options

Steps

Use the following procedure to set up Contracts profile options:

1. Login to Oracle Applications (sysadmin/sysadmin) and choose the System Administrator responsibility.
2. Navigate to **Profile > System.** The Find System Profile Values window opens.
3. Enter "%OKC%" in the Profile field, of the Find System Profile Values window.
4. Click **Find**.
5. Set up the following profiles, (in any order) to enable the iStore / Oracle Contracts integration:

Option	Value	Description
OKC: Contract Approver	<User name>	This profile should be set to the person authorized to approve contracts; after contracts are submitted for approval, they will be routed to this person for approval.
OKC: Contract template for standard terms and conditions	<Contract template name>	When an iStore customer uses Checkout, the terms and conditions are viewed and the subsequent contract is created for that order is originated from the contract template defined in this profile option. Choose from the list of values.
OKC: Default contract administrator for notifications	<User name>	This profile should be set to the person who will receive a notification that a contract in "Entered" status was created from iStore. This will occur when the customer disagrees to the standard terms and conditions.

Option	Value	Description
OKC: Default group for contracts created from quote	<Contract group name>	This profile should be set to a contract group. Contracts created via the iStore flow will automatically be organized in this contract group found in the Contract Navigator. This takes precedence over any groups set up in the template. The contract group must first be created before specifying that group name here.
OKC: Notify administrator about new contract from iStore	Yes/No	Set this to “Yes” if you want the Contract Administrator to receive notifications for every contract created from iStore when the customer disagrees with standard terms and conditions.
OKC: User Directory	<Directory path>	This profile specifies the directory of the HTML style sheet. This file is for formatting the Terms and Conditions appearing in iStore. The value is the location of the style sheet file, and should look like this: “/u01/db/kstoreit/xsl/”; the specific location will depend on each installation. The directory path should always end “/” or whatever directory separator specific to the platform.The database administrator should have read access to this file.

3.2.1.2 iStore Profile Options

If you are integrating Oracle iStore with Oracle Contracts, you will need to set up Oracle iStore and set the iStore profile options. The Oracle iStore profile option, “IBE: Create Standard Contract” specifies whether a contract is created when a customer agrees to standard terms and conditions. If the profile is set to “Yes”, a contract is created with a status of “signed” when the customer places the order. If the profile is set to “No”, a contract is not created. The profile default value is “Yes”.

For specific instructions on iStore setup steps, reference the *Oracle iStore Implementation Guide*.

3.2.1.3 Order Capture Profile Options

If you are integrating Oracle iStore with Oracle Contracts, you will need to set up Oracle Order Capture and set the Order Capture profile options. The Oracle Order Capture profile option, “ASO: Enable Use Contracts” activates integration with Oracle Contracts. “Yes” activates the integration; the default profile is “No”.

For specific instructions on Order Capture setup steps, reference the *Oracle Order Capture Implementation Guide*.

3.2.2 Setting Up Lookup Codes

The Application Object Library Lookups window is used when identifying and defining Lookup Codes.

From the Corporate Contracts Manager responsibility, select **Setup > Others > System > Lookups.**

Code	Description
OKC_ISTORE_ART_TITLE	Specifies meanings for the title of the Terms and Conditions page.

3.2.3 Verifying Workflow Setup

The Workflow Background Process must be running to ensure Contract Alerts are being sent to the Contract Administrator when a Contract is created from iStore, and to ensure that the Contract Approval process will work.

For detailed instructions on setting up Oracle Workflow, reference the *Oracle Workflow Guide*. To verify the Workflow Background Process is running do the following:

Steps

1. Login to Oracle Applications (sysadmin /sysadmin) and choose the System Administrator responsibility.
2. Navigate to **Requests > Run.**
3. Select Single Requests and click **OK**.
4. Select Workflow Background Process from the LOV in the Name field. The Parameters window opens.
5. Choose “Contract Alert” from the Item Type LOV.
6. Choose “Yes” from the Process Deferred LOV.
7. Choose “Yes” from the Process Time-out LOV.
8. Click **OK**.
9. Click **Submit.**

10. From the Navigator, select **View**. The Requests screen should return a list of subsequent requests that have been entered or completed for the Workflow Background Process.

If the Workflow Background Process is not running, you can run the process manually, or schedule the process to run automatically.

11. Repeat steps 1-8 above.
12. Click **Schedule.**
13. Select Periodically.
14. Select Minutes from the Re-run every LOV.
15. Click **OK.**

3.2.4 Setting Up Personnel

When you are integrating Oracle iStore with Oracle Contracts, the Contract Administrator and Sales Representative must be set up. The following setup steps will need to be completed:

3.2.4.1 Creating Employee Record

Steps

1. From the Human Resources Management System (HRMS) responsibility, **(N) People > Enter and Maintain.**
2. Create an employee record—Set up the Contract Administrator and Sales Representative as Employees.
3. Select the **Office Details**.
4. Enter the employee’s e-mail address.
5. From the CRM Resource Manager responsibility, **(N) Maintain Resources > Resources.**
6. Create a user name and tie the user name to the employee.
7. Assign a role to the user name (Contract Administrator and Sales Representative roles).
8. **(N) Import Resources**.
9. Import the user as a CRM resource.

For more details on this setup please see the following reference:

- *Oracle CRM Foundation Implementation Guide*

3.2.4.2 Specify the Sales Representative for Notifications

To enable notifications to be sent to Sales Representatives when a customer disagrees with standard terms and conditions, or when standard terms and conditions are changed and ready for the customer's approval, the following setup is required:

Steps

1. From the HRMS responsibility, **(N) Work Structures > Organization > Description**. The Find Organizations window appears.
2. Select a Name from the LOV to search for the Operating Unit for a specialty store.
3. Click **Find**. The Organization window appears.
4. Select the Operating Unit from the Organization Classification region.
5. Click **Others**. The Additional Organization Information window appears.
6. Select the Default Notify User from the LOV and click **OK**.
7. Place the cursor in the Default Notify User field. The Default Notify User window appears.
8. Enter the user name of the sales representative (uppercase) in the Contracts field. This will be the person who will receive notifications when a customer disagrees with the standard terms and conditions and when terms and conditions are modified and approved for customer review.
9. Click **OK**.

3.2.4.3 Setting Up Notification Mailer Process

Steps

1. From the System Administrator responsibility, **(N) Requests > Run.**
2. Select Notification Mailer for the request. The Parameters window opens.
3. Enter "<FND_TOP>/resource/wfmail.cfg" for the location of the wfmail.cfg file located in the FND_TOP resource directory. For example, "/afrz/crmcon/kstoreit/fnd/11.5.0/resource/wfmail.cfg".

For more details for this setup see, *Oracle iStore Implementation Guide*.

3.3 Setting Up Order to Contract

Use the procedure for setting up Contracts for Sales for Order to Contract.

3.3.1 Setting Up the Article

Steps

1. Review and setup the following profile options as needed:

User Profile	Required/Optional
OKC: Contract template for standard terms and conditions	Required
OKC: Notification required for contract administrator	Optional
OKC: Default group for contracts created from quote	Optional
OKC: Default contract administrator for notifications	Optional

2. From the Contracts Navigator **(N) Contract > Setup > Standard Articles > Define Articles.**
3. Enter article name.
4. Select appropriate subject name.
5. Enter your initial release version.
6. Enter effective date.
7. Enter a short description.
8. Click Article Sets tab.
9. Associate the standard article to an article set.
10. Click Releases tab.
11. Click Release Text.
12. Enter the standard article text.
13. Save your work. You should see the article name within the article set in the tree.

3.3.2 Setting Up the Template

Steps

1. From the Contracts Navigator, **(N) Launch Contracts > Open > Tools > New.**
2. Select Create a New Contract Manually.
3. Select Contracts for Sales as the Category.
4. Click Create.
5. Select Intent.
6. Click Articles tab.
7. Select Standard check box.
8. Select your Article.
9. **(N) Actions > Save as template**.
10. Enter template name.
11. Switch Responsibilities to System Administration.

Associate the template created with profile option “OKC: Contract template for standard terms and conditions”. This is a mandatory step.

12. **(N) Profiles > System.**
13. Select the Template name just created as Value for Profile Option “OKC: Contract template for standard terms and conditions.

Associate the Contract Group with the profile option “OKC: Default group for contracts created from quote”. Associate the Contract Administrator with the profile option “OKC: Default contract administrator for notifications”. These steps are optional.

14. **(N) Profiles > System.**
15. Select the Contract Group as value for Profile Option “OKC: Default group for contracts created from quote”
16. Select the Administrator Name as value for Profile “OKC: Default contract administrator for notifications.