Oracle Fusion Cloud Sales Automation

How do I configure and use Contract Requests?

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1 Configure Contract Requests

About Contract Requests

A request for a contract is the very first step of the contract lifecycle management. Business users (contract requesters) who don't have access to the contract application, raise a request to create a contract with their contract requirements. Usually, the requests are sent for approval to the requester's manager.

Once the request is approved, someone from the contract team or legal department reviews the request and creates the contract based on the information provided by the requester. If there’s insufficient information, the legal team member can ask the requester to provide more information. Once all the information is available, the assignee creates a contract from the request on behalf of the requester.

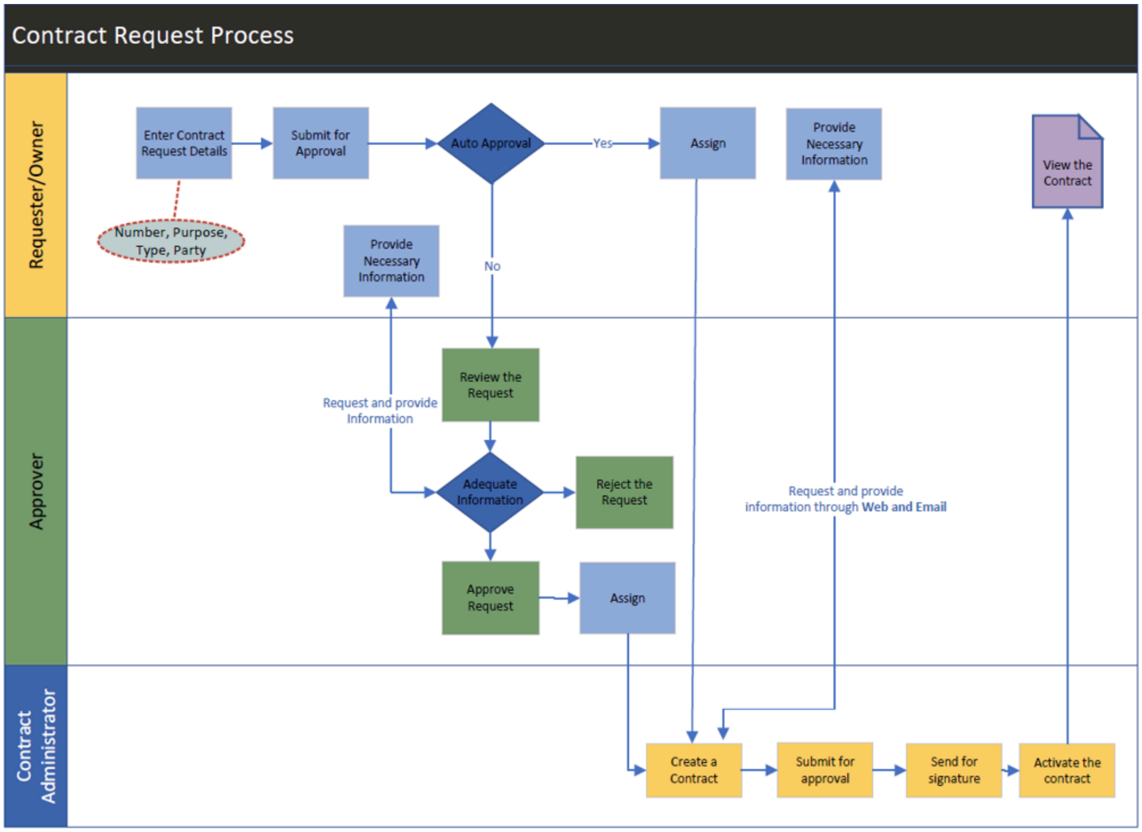
Contract Requests Roles and Process Flow

Managing and creating contract requests involves many user personas. For example, the person who requests a contract (requester) might be a salesperson requiring a sales agreement for a customer, a procurement agent requesting an item and services contract, or a HR manager requesting an employment contract, and so on.

The different contract request personas are clearly defined as follows:

Persona	Description
Requester	Person who starts or requests a contract request.
Owner	Person on whose behalf the request is created by the requester. By default, the requester and owner are the same.
Approver	Person who approves the contract request. Usually, it's the requester's manager.
Assignee	Person who reviews the requests and makes sure all the necessary information is present to create a contract.
Contract Administrator	Person who does the essential setup such as setting up the contract request types and approvals, adding appropriate roles to the users, and so on.

Here's a sample contract request process flow.



For more information about the Contract Request process flow, watch this video: *Overview of Contract Requests*

Enable Manage Contract Requests

You enable the Manage Contract Requests feature using the opt-in task. If you've permission to configure offerings, then you can use the New Features page to opt in to the feature as follows:

1. Click **Navigator** > **My Enterprise** > **Offerings** work area.
2. On the Offerings page, select the Enterprise Contracts offering.
3. Click **Opt In Features**.
4. For the Enterprise Contracts root node, click the edit link (pencil icon).
5. From the Edit Features page, find **Manage Contract Requests** and select the checkbox in the **Enable** column.
6. On the Opt In page, click **Done** to save the changes and return to the Offerings page.

   For more information, see the New Feature Opt-In section of the Oracle Applications Cloud - Using Functional Setup Manager guide on the Oracle Help Center (docs.oracle.com).

Security and Privileges for Contract Requests

A contract request can be created by any employee in the organization with the appropriate privileges and duty roles.

The following lists the access requirements to use and work with contract requests:

- The **Manage Contract Request Type** privilege is added to the existing **Contract Setup** duty role (ORA_OKC_CONTRACT_SETUP_DUTY). Users with this privilege can access the Manage Contract Request Types UI. This is the setup UI where the contract request types are created.
- The Requester persona should have the **Contract Request Authoring** duty role (ORA_OKC_CONTRACT_REQUEST_AUTHORING_DUTY) to perform the following tasks:
  - Search Contract Requests
  - Create Contract Request
  - Edit Contract Request
  - Delete Contract Request

  This duty role is added to the Sales Representative job role (ORA_ZBS_SALES_REPRESENTATIVE_JOB).
- The Assignee persona should have the **Contract Request Review** duty role (ORA_OKC_CONTRACT_REQUEST_REVIEW_DUTY) to perform the following tasks:
  - Search Contract Requests
  - Edit Contract Request
  - Review Contract Requests

  This duty role is added to the following job roles:
  - Supplier Contract Manager - ORA_OKC_SUPPLIER_CONTRACT_MANAGER_JOB
  - Customer Contract Manager - ORA_OKC_CUSTOMER_CONTRACT_MANAGER_JOB
  - Enterprise Contract Manager job -ORA_OKC_ENTERPRISE_CONTRACT_MANAGER_JOB

> **Note:** The duty roles are added to certain predefined job roles but you can also add the duty roles to any relevant custom job role.

Set Up Contract Request Types

From the Contract Request Types user interface, you can perform the following tasks:

- Create request types of Buy or Sell intent.
- Associate the request type to one or more contract types.
- Add an assignee to the request type.

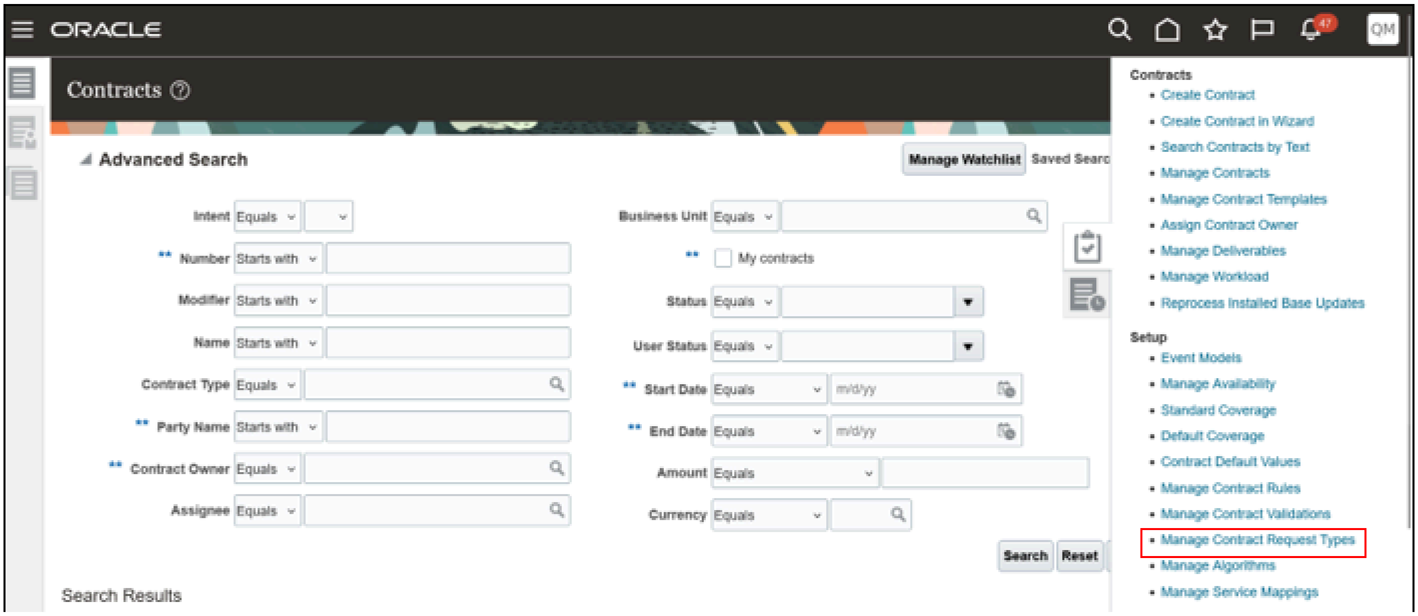
The request types you create appear in the **Type** field of the **Create Contract Request** UI. The associated contract types will appear in the **Contract Type** field of the **Edit Contract Request** UI. For a contract request, you can only create contracts of the contract type that you've specified in this UI.

The assignee is usually the reviewer of the contract request who might be someone from the contract or legal department. When a request of this type is created, it's assigned automatically to the assignee but you can change the assignee based on your requirements.

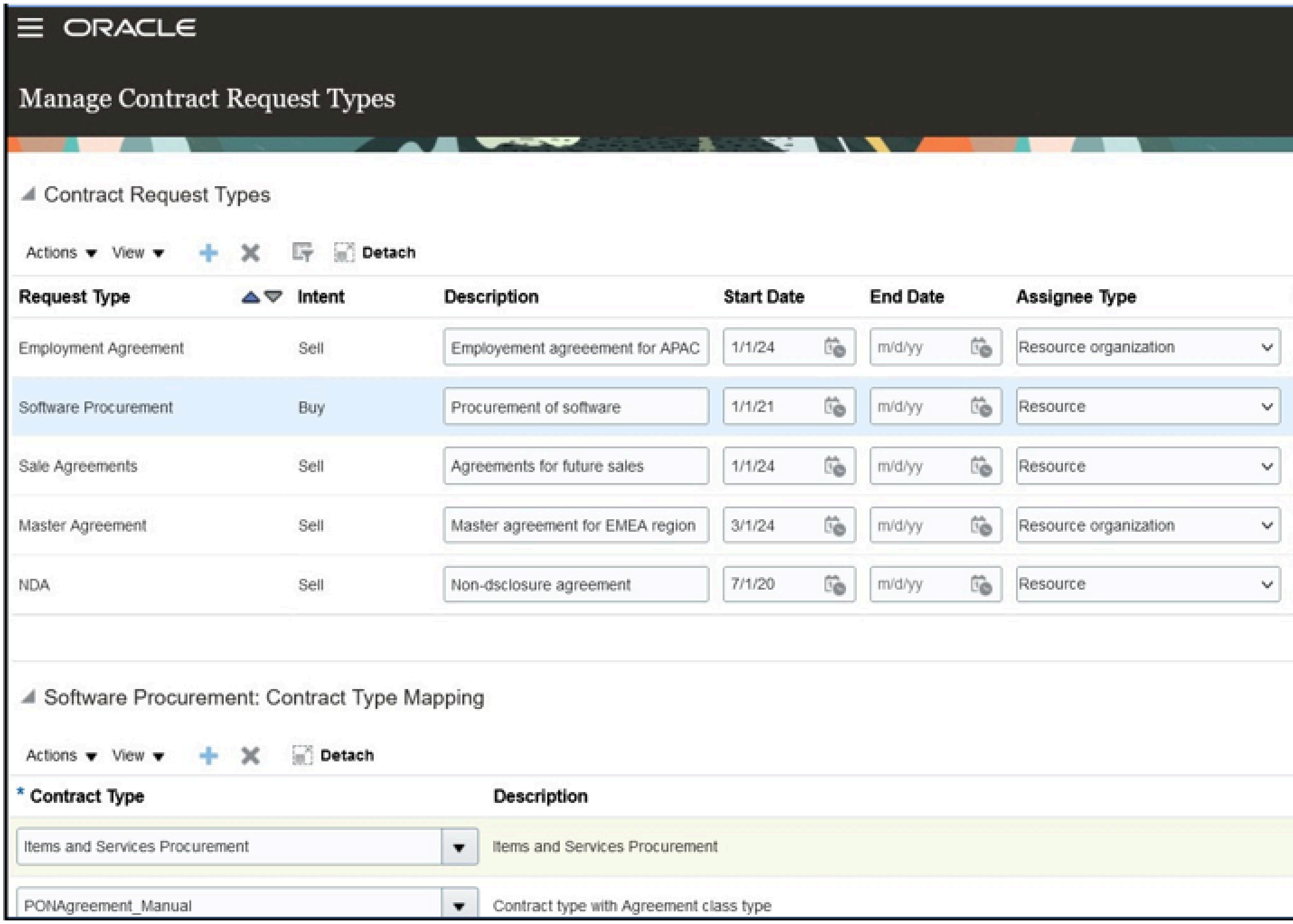
Access the Manage Contract Request Types UI to setup and manage your contract request types from the Contracts landing page as follows:

1. Sign in as a contract administrator with the required privileges.

2. Navigate to **Tasks** > **Setup** > **Manage Contract Requests Setup** as follows.



The following page is displayed.



3. Setup the contract request type with the intent that you want.
4. Select the assignee type and assignee for the request type.
5. Map your request type to one or more contract types of the same intent and select a default.
6. Save your changes.

Set Up Channel Types for Contract Request Interactions

Contract requests supports email and web interactions channel types. A web channel interaction is the conversations that you can have with others from the Interaction tab of the Contracts Requests UI. An email channel allows users interact by sending and receiving contract requests related emails.

Users should have the Service Request Administrator (ORA_SVC_SR_ADMINISTRATOR) duty role to perform the following setups.

1. *Register Access Points for Inbound Emails*
2. *Configure an Email Channel*
3. *Disable Channels other than Web and Email Channels*

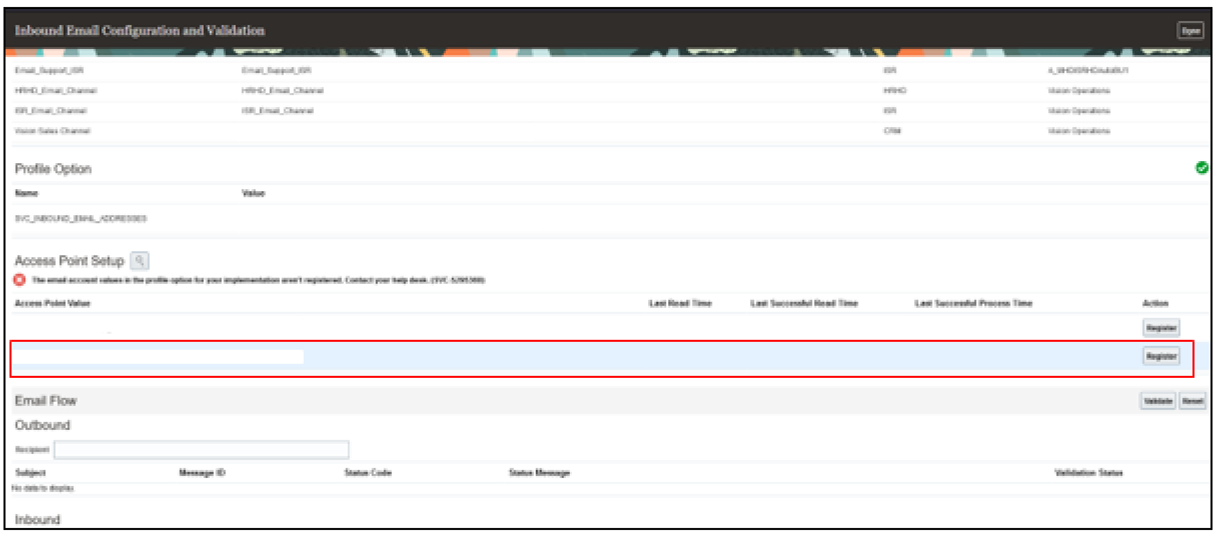
4. *Set a Scheduled Process to Retrieve Emails*

Register Access Points for Inbound Emails

Access points are registered clients that are authorized to read emails from your inbox. When email responses are sent to your channel, the User Messaging Service (UMS) reads those emails from your inbox and delivers them to registered access points.

To register access points for your inbound emails, use the **Access Point Setup** region of the **Inbound Email Configuration and Validation** page in UMS as follows:

1. Sign in to Oracle CX Sales using Administrator role.
2. In the Setup and Maintenance work area, go to the following:
   - Offering: Service
   - Functional Area: Communications Channels
   - Task: Manage Email Configuration, Registration, and Validation



3. From the **Inbound Email Configuration and Validation** page, go to the **Access Point Setup** region, highlight the **Access Point Value** row as highlighted with the URL that contains `extservice.incomming`.
4. Click **Register**.
5. Copy the URL as you'll use it in the **Configure an Email Channel** setup.
6. Click **Yes** in the Warning dialog box to continue.

For more information about setting up access points for inbound emails, see *Overview of Access Point Setup for Inbound Emails* in the Implementing Help Desk guide.

Configure an Email Channel

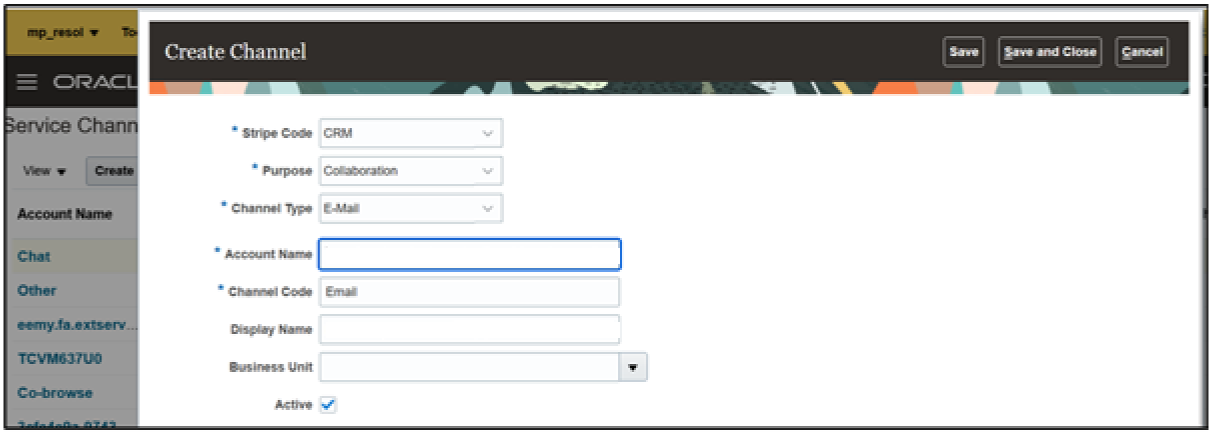
You must set up an email channel to enable users to send and receive emails in contract requests.

Perform the following steps to configure your email channel:

1. In the Setup and Maintenance work area, go to **Manage Communication Channels**.

2. On the Service Channels page, click **Create Channel**.

   A screen similar to the following is displayed.



3. In the **Create Channel** window, select **CRM** as the **Stripe Code**.
4. Select **Collaboration** as the **Purpose**.
5. Select **E-Mail** as the **Channel Type**.
6. In the **Account Name** field, paste the full Access Point Value URL that was copied from step 3 of the Register Access Points for Inbound Emails setup section).
7. Ensure that the **Channel Code** is unique.
8. (Optional) Enter a **Display Name** to indicate any information about the channel such as the name of the organization for the channel.
9. Leave the **Business Unit** as blank.
10. Select the **Active** checkbox.
11. Click **Save**.

A new entry will be added to the **Channel Setup** section of the **Manage Email Configuration, Registration, and Validation** page.

Disable Channels other than Web and Email Channels

The contract request interactions only support web and email interaction channels so other channels can be disabled.

Complete the following steps so that other channels won't be displayed in the **Channels** list on the **Interaction** tab for the contract request:

1. In the **Setup and Maintenance** work area, go to the **Tasks** panel tab.
2. Search for and click the **Manage Service Request Channel Type Visibility** task.
3. On the Manage Service Request Channel Type Visibility page, click **Sync** on the toolbar of the table if you don't see the channels you want to disable.
4. For any channel that you select, you see two rows with different values for **Property Name:**
5. For both web and email channels:
   a. **Enabled for Collaboration**: Set the **Property Value** for this property name to **Yes**.
   b. **Enabled for Customer Interaction**: Set the **Property Value** for this property name to **Yes**.

6. For all the other channels, set these two values as **No**.

   The disabled channels won't be displayed in the **Channels** list of values in the **Interaction** tab of the contract request.

   > **Note:** If you're using the Fusion Service, Help desk application, the setups you perform here are applicable for that as well. Currently there's no option to only hide specific channels for contract request. So don't disable the channels used in Help desk.

7. Click **Save and Close**.

Set a Scheduled Process to Retrieve Emails

You can configure a new scheduled job to retrieve emails regularly, based on the specified frequency as follows:

1. From the Navigator menu, select the **Scheduled Processes** option.
2. In the Scheduled Processes screen, click **Schedule New Process**.
3. In the Schedule New Process dialog box, select **Job** for **Type**.
4. Search for and select the **Retrieve Inbound Email Messages** option from the **Name** drop-down list.
5. Click **OK**.

   The Process Details dialog box is displayed.
6. Click **Advanced**.
7. In the **Schedule** tab, in the **Run** options, select the **Using a schedule** option.
8. Select **Frequency** and specify a **Start Date**.

   > **Note:** You must always select a frequency whether you're using your test or your production environment. You can select a higher frequency if required. If you run a job manually without setting a frequency, the process might not retrieve all the emails.

9. Click **Submit**.

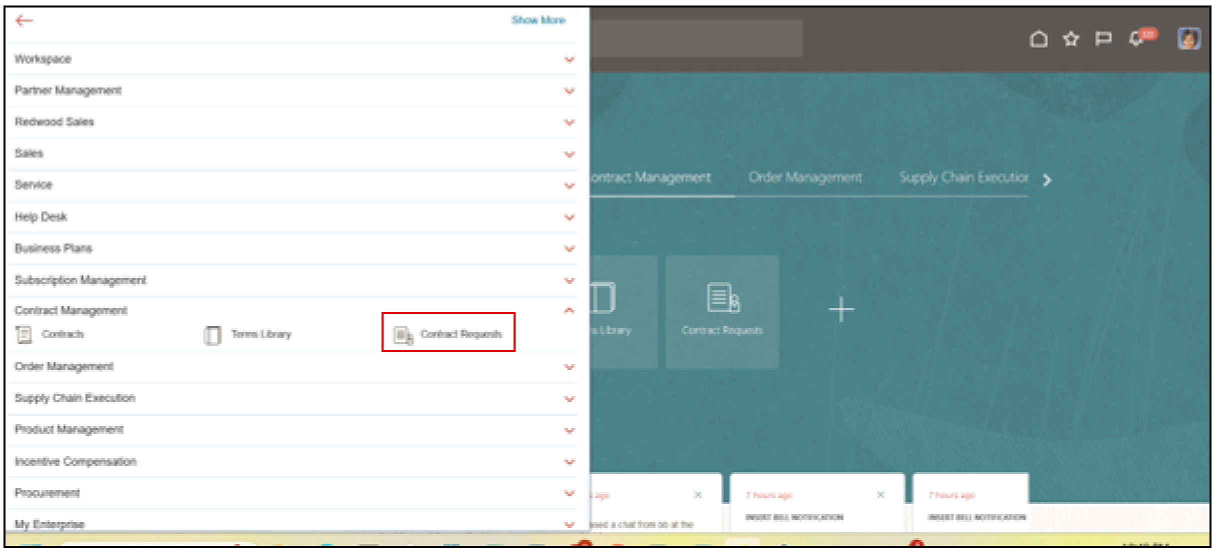
> **Note:** When you schedule the job to run periodically, it pulls all the emails from all the servers. After scheduling the job your application might take few iterations of the job to refresh the caches that are required for the successful execution of inbound email processing. As a result, email processing might be delayed until the required caches are fully refreshed.

2 Get Started with Contract Requests

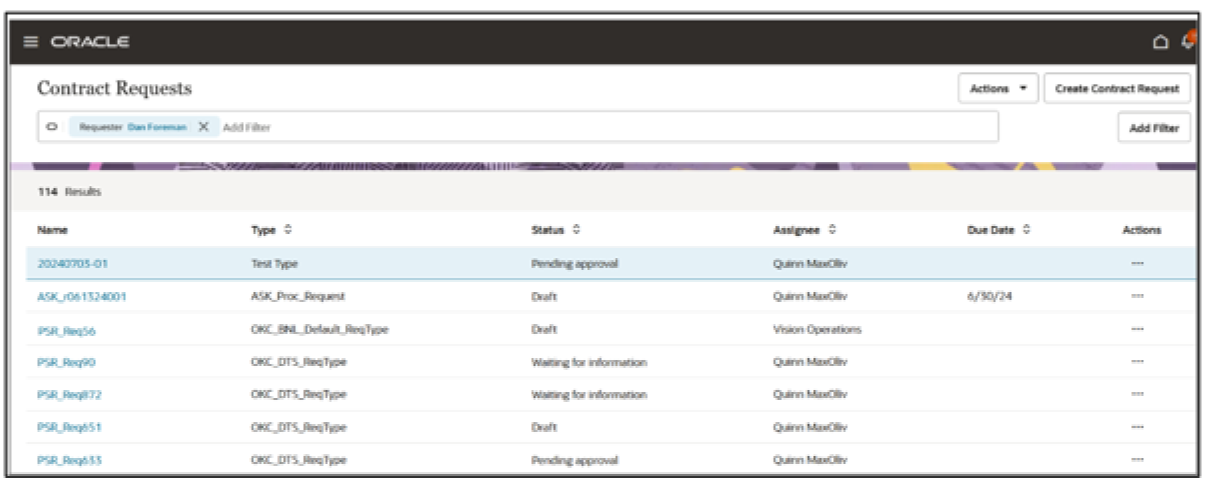
Access My Contract Requests List Page

From the Contract Requests page, you can create, edit, and delete contract requests. You can search for the requests created by you, or your direct reports and search for requests assigned to you or your resource organization from this UI.

Access the Contacts Request List page as follows: **Navigator** > **Contract Management** > **Contract Requests** as follows:



A page similar to the following is displayed



Contract Request Actions

You can perform the following actions from the **Contract Requests** page.

Action	Description
Search	Click **Add Filter** to add search filters. **Tip:** If the Add Filter doesn't show fields or if no default filter appears in the Search box, then follow the steps outlined in the **Add Filter Display Workaround** section to resolve the issue and verify the solution.
Edit	Click Edit to open the **Edit Contract Request** page.
Delete	Delete action is only available when the contract request has a status of **Draft**. This action will delete the contract request from the database.

Add Filter Display Workaround

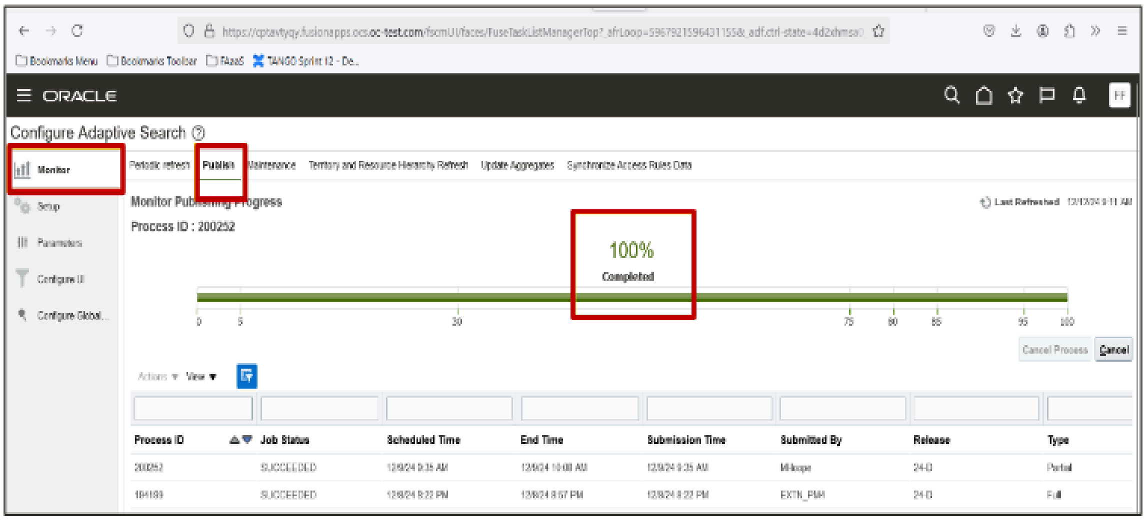
Follow these workaround steps if the Add Filter doesn't display any fields or if no default filter appears in the Search box in the Contract Request list UI.

- Ensure that the Sales offering is enabled and then enable Adaptive Search.
- Perform a Full publish of the Adaptive Search configuration, monitor the publishing progress, and verify the solution.

Here's how you can enable navigation to the new work areas that use Adaptive Search.

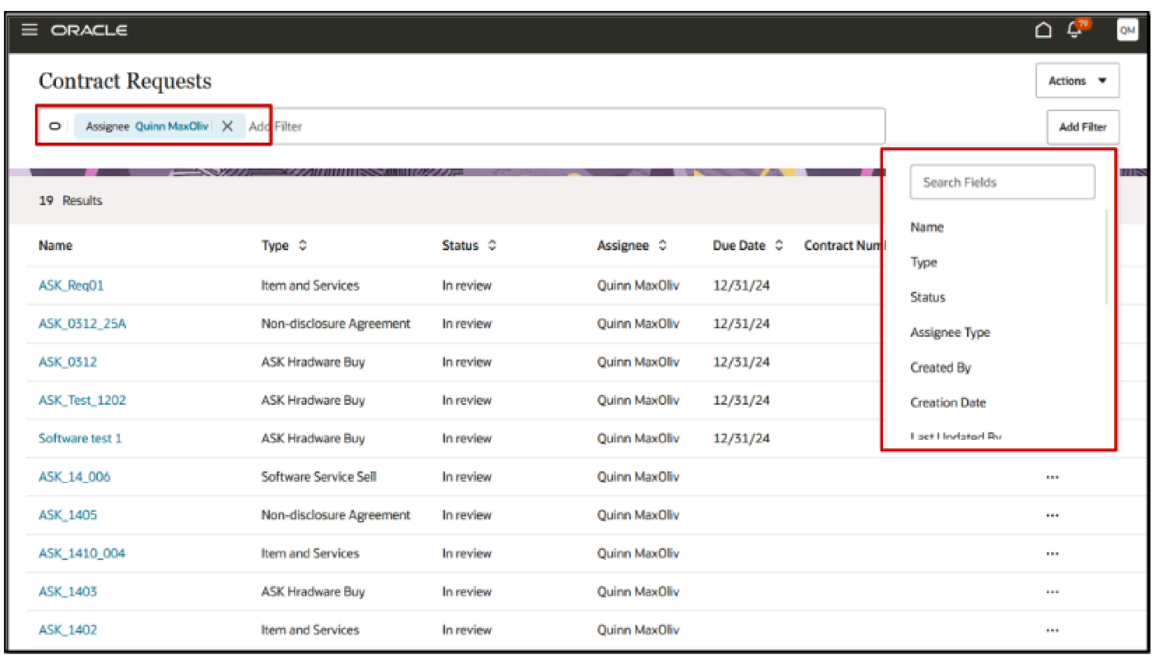
1. Sign in as a setup user.
2. In the Setup and Maintenance area, go to the Sales offering.
3. Select the **Change Feature Opt In** from the **Sales Foundation** functional area and open the **Edit Features: Sales Foundation** page.
4. In the Features column, find **Open Work Areas Powered by Adaptive Search**.
5. Click the pencil icon and select the **Enable** checkbox.
6. Click **Done** and sign in again.
7. In the Setup and Maintenance work area, go to:
    - Offering: Sales
    - Functional Area: Sales Foundation
    - Task: Configure Adaptive Search
8. On the Configure Adaptive Search page, click the **Setup** tab.
9. From the Actions menu, click **Full Publish**.

10. Monitor the progress of the indexing process on the **Monitor** tab. Click the **Publish** subtab and wait for the publish to complete 100% as shown.



> **Note:** The process can take several minutes to complete, depending on your data volume.

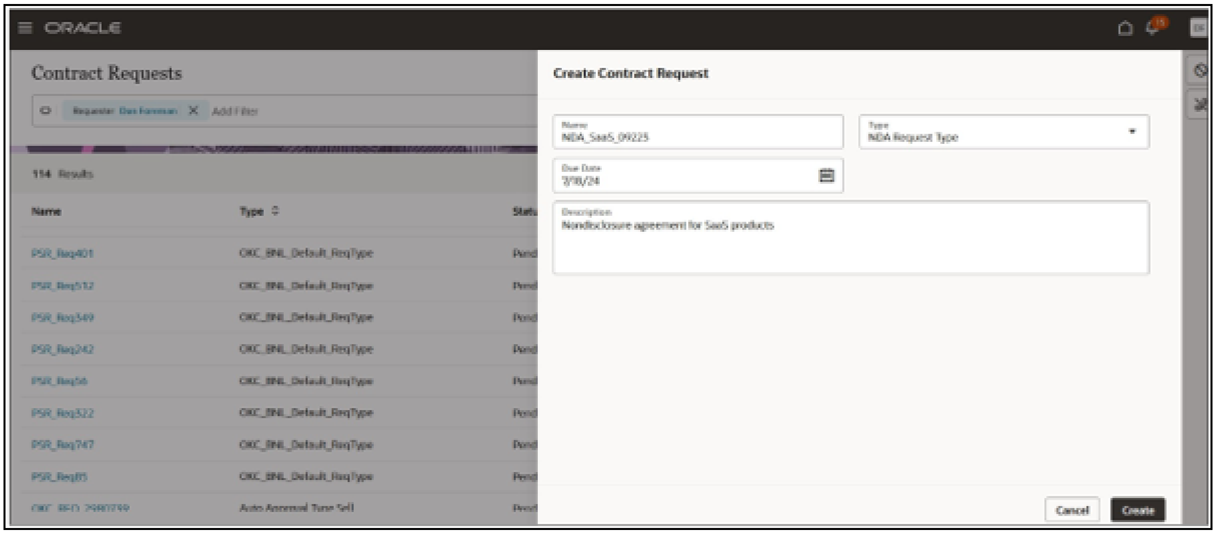
11. Verify the solution by ensuring you can see the default search filter `Assignee` and other search filters when you click **Add Filter** from the Contract Requests UI as shown.



Create a Contract Request

You can create a new contract request as follows:

1. Click **Create Contract Request** to open the Create Contract Request panel.



2. Enter details such as Name, Type, Due Date, and Description.
3. Click **Create**.

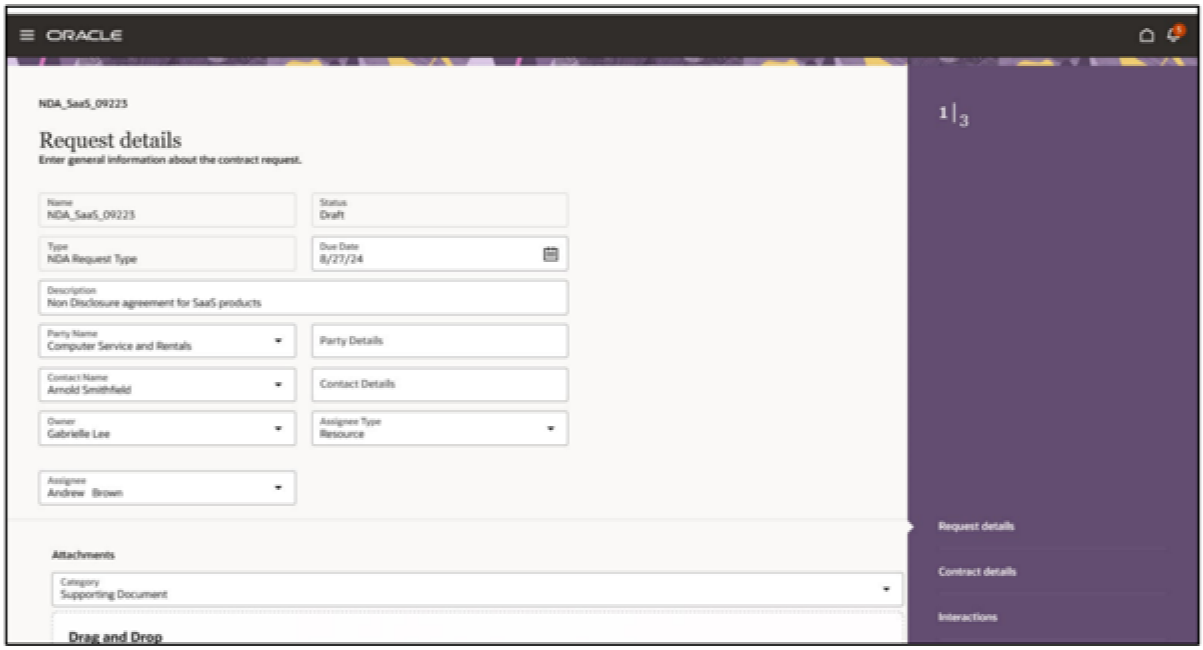
This action begins the 3 step process where the requester can enter details related to the request, contract, and interactions. See *Enter Request, Contract, and Interaction Details* for more information.

Enter Request, Contract, and Interaction Details

After you create a contract request, you navigate to the Edit Contract Request guided process where you enter the request, contract, and interaction details.

Request details

In this first step, you enter the request details as follows:



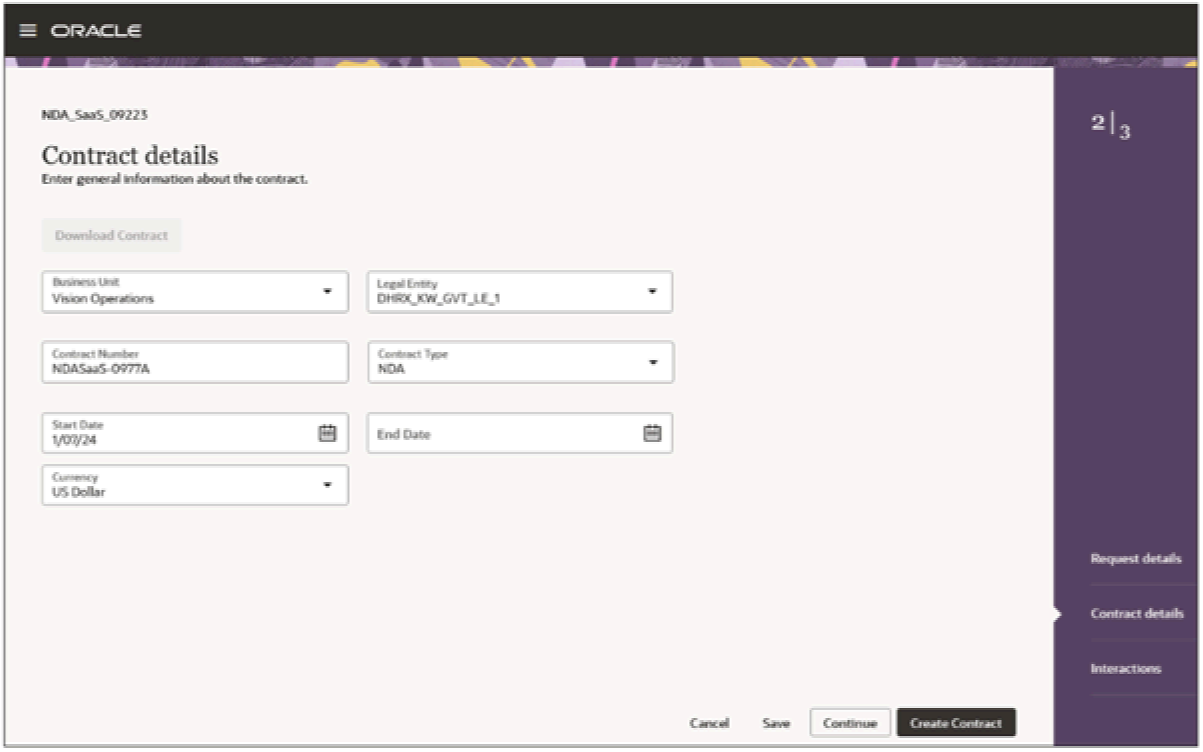
Field	Description
Name	Unique name of the request. Read-only after creation.
Status	Read-only field.
Type	Contract request type. Only active contract request types from the Manage Contract Request Types UI will be listed here. Read-only after creation.
Due Date	Date on which the contract document needs to be ready. Provides information to the assignee to get the contract document ready by this date.
Description	Description of the request.
Party Name	Name of the customer, supplier or employee for whom the contract is created. The list of values is populated based on the contract request type intent. If the party doesn't exist in the application, leave the field blank and enter the details of the party in the Party Details field.
Party Details	Name, address, and other details of the party. The assignee must create the party in the application manually based on this information.
Contact Name	Name of the party contact. If the contact doesn't exist in the application, leave the field blank and enter the details of the contact in the Contact Details field.
Contact Details	Name, address, and other details of the contact. The assignee must create the contact in the application manually based on this information.
Owner	By default, the requester is the owner. If the requester is creating the request on behalf of some other person, the owner will be different than the requester.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Assignee Type</td><td>The assignee can be a resource organization or a resource (a contract team or a specific individual). If the request is assigned to an organization, then all the resources in the organization can view the request. If the request is assigned to a resource, only that resource and the managers of the resource in the upward hierarchy can view the request.</td></tr>
<tr><td>Assignee</td><td>Based on the Assignee Type, the values will be displayed. Assignee verifies if all the necessary information is present in the request to automatically create a contract.</td></tr>
<tr><td>Attachments</td><td>You can upload files that are applicable for the contract.
The document with category Third-party Contract Document will be added to the contract that's created automatically in the Attached document section of the Terms tab and also as the Primary Contract Document (PCM).
The document with category Supporting Document will be added in the contract in the Supporting Documents section in the Document tab.
The documents with category Miscellaneous won't be added to the contract that's automatically created.</td></tr>
</table>

Contract details

This is the second step in the edit contract request guided process. The requester enters the details of the contract that needs to be created. The **Create Contract** button is enabled only for the assignee and not for the requester.

If the requester doesn't have some contract information, the assignee should enter these details before creating a contract.



Enter the contract details as per the following table.

Field	Description
Business Unit	Business unit associated with the contract.
Legal Entity	Legal entity for the business unit.
Contract Number	Represents the number of the contract. For contract types setup with auto numbering, this field will be read-only.
Contract Type	For contract types setup with auto numbering, this field will be read-only
Start Date	Identifies the start date of the contract.
End Date	Identifies the end date of the contract.
Currency	Represents the currency of the contract.

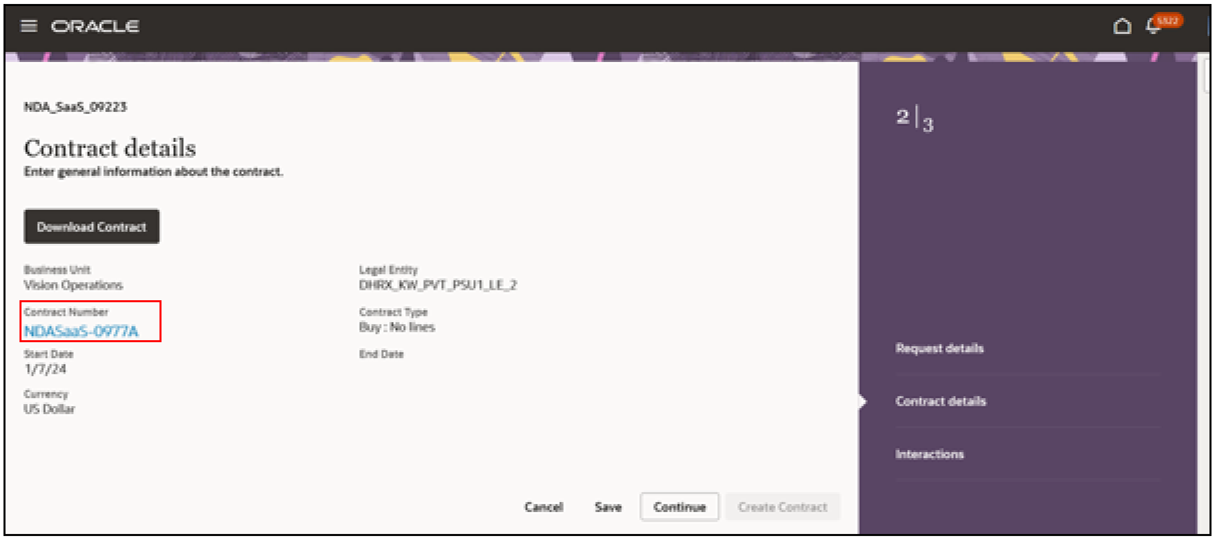
When the assignee clicks **Create Contract**, a contract is created based on the standard field mapping between the request details and the contract details. You can add custom application composer fields for the contract request object and map them to the standard or custom contract fields. See the Extend Contract Request section for more details.

The following table specifies the predefined mapping that are delivered as part of the feature:

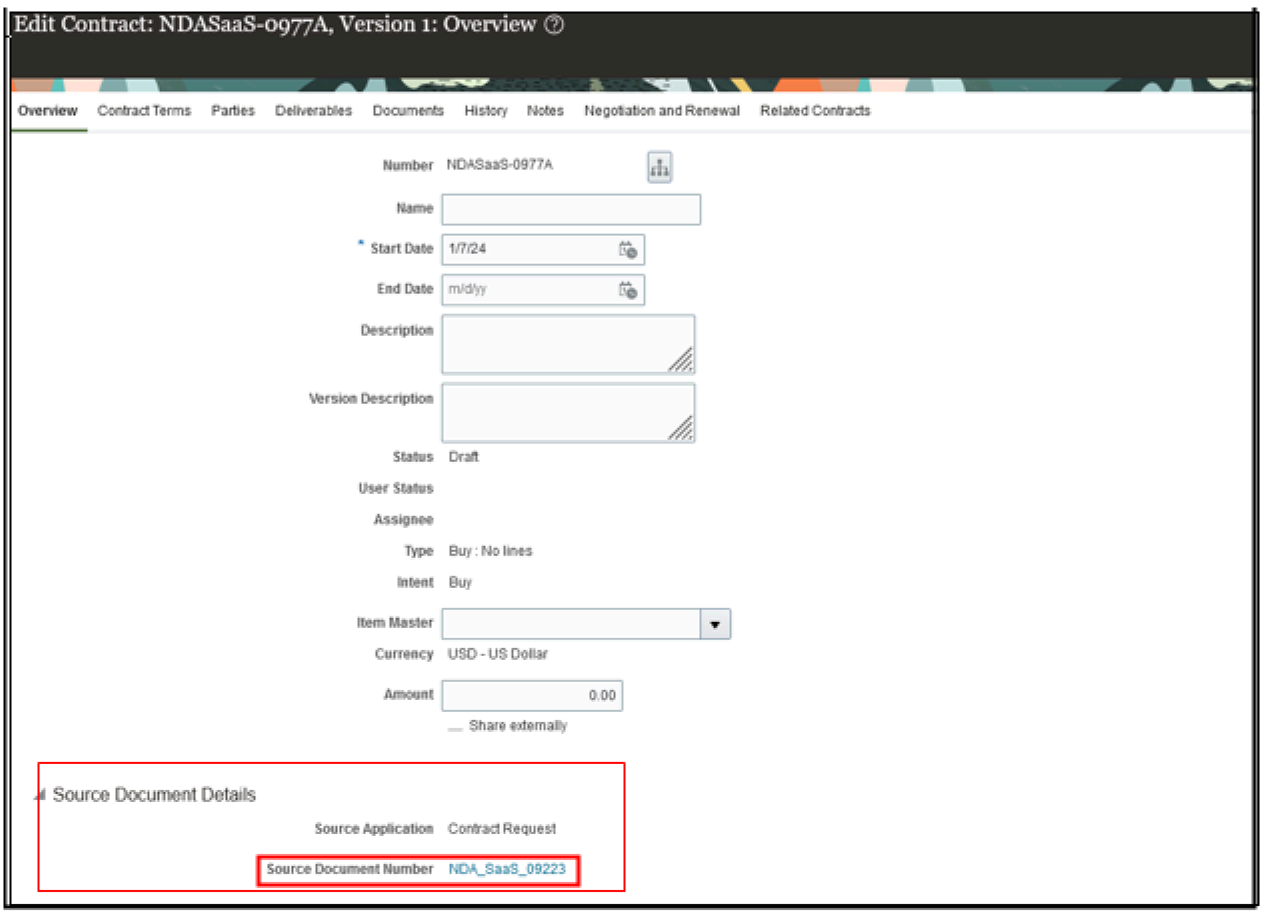
This Request details field is mapped to...	This Contract field...
Party Name	Customer, Supplier or Employee based on the intent.
Contract Name	Will be added as a Supplier Contact or Customer Contact based on the intent. If there are multiple contact types, a contact type will be chosen randomly.
Business Unit	Business Unit
Legal Entity	Legal Entity
Number	Number
Type	Type Intent field will be derived based on the contract request type setup.
Start Date	Start Date
End Date	End Date
Currency	Currency
Attachments	The document added in the Attachment section with category: • **Third-party Contract Document** will be added in the contract as **Attached document** in the **Terms** tab and that will be the Primary Contract Document (PCM). • **Supporting Document** will be added in the contract in the **Supporting Documents** section in the **Document** tab. • **Miscellaneous** won't be added to the contract.

Note: Contracts with header information only will be created. If the contract has lines, those lines need to be created manually by the assignee.

Once a contract is created, the assignee can drill-down to the contract by clicking on the **Contract Number** link. Once the contract is activated, the **Download Contract** button will be displayed on the **Contract details** page as shown from where the requester can download the contract document by clicking on the link.



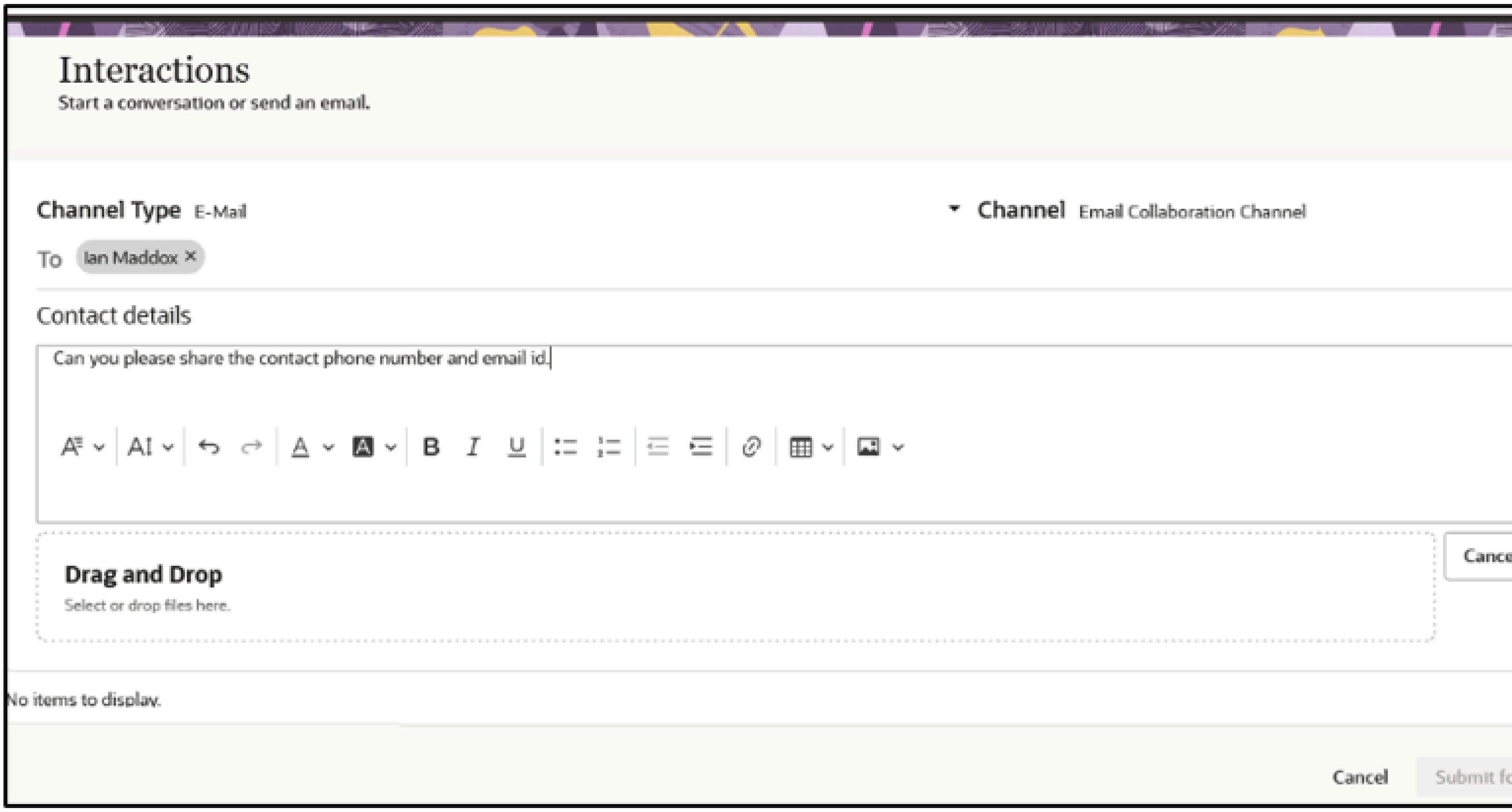
Once a contract is created, the contract number is displayed in the **Edit Contract Overview** page as a link as highlighted in this sample screenshot.



Once the contract is created, the **Source Document Details** specifies Contract Request as the **Source Application** and the contract request number as the **Source Document Number**.

Interaction

In this final step 3 of the Contract Requests guided process, the requester and assignee can communicate with each other either by starting a conversation or sending emails. Conversation and mail history is captured. Typically, this is used to request or provide information about the contract that needs to be created.



About Contract Requests Status Changes

The status of contract requests change according to predefined business rules. They're often triggered by specific events or actions performed on the contract request.

For example, a requester provides the necessary details about a contract request and submits the request for approval. Requests are auto-approved, and the request status quickly transitions from Draft to In Review status. You can set up your own approval rules and hierarchy using the Contract Request Approval Task in Business Process Manager (BPM). In this case, the status of the request changes to Pending Approval, and the approver receives an email or a bell notification.

Once the request is approved, the status becomes In Review, and the request is assigned to the assignee mentioned in the Contract Request. If the request is rejected, the status changes back to Draft.

If the status is set to In Review, a notification is sent to the assignee. The assignee can view and verify the details of the request. The assignee can be a resource or resource organization to whom the contract is assigned. If the assignee is a resource organization, the notification is sent to the manager of the organization.

When the status is set to Waiting for Information, the notification is sent to the requester.

This table lists the contract request statuses and provides scenarios about when the status changes from one status to another:

Contract Request Status	Details	Scenario 1	Scenario 2
Draft	The requester is entering details.	If approval is set up: Clicking **Submit for Approval** changes the status to Pending Approval.	If approval isn't set up: Clicking **Submit for Approval** changes the status to In Review.
Pending Approval	The requester has submitted the request for approval.	Automatically set to In Review when the request is approved	Automatically set to Draft when the request is rejected
In Review	The request is with the Assignee for review.	Clicking **Provide Information** changes the status to Waiting for Information.	Clicking **Create Contract** changes the status to Pending Contract Activation.
Waiting for Information	The assignee is waiting for more information from the requester, so that the contract can be created.	Clicking **Submit for Review** changes the status to In Review.	NA
Pending Contract Activation	The contract is created automatically and it's not active.	Status of the request is set to Completed automatically when the status of the contract becomes Active.	NA
Completed	The contract is active.	Final status	NA

The following action buttons are enabled only in specific statuses for specific personas as per the following.

Action Button	Persona	Status
Submit for Approval	Requester	Draft
Create Contract	Assignee	In Review
Submit for Review	Requester	Waiting for Information
Provide Information	Assignee	In Review

3 Extend Contract Requests

Enhancements to Contract Request User Experience

The manage contract requests feature is enhanced to include the following capabilities:

- Contract request names can now begin with a number.
- Users can cancel contract requests that are in the **Draft**, **In Review**, and **Waiting for Information** statuses.
- The Party Name, Assignee, and Owner fields now display more relevant details. For example, The Party Name field shows both the party's name and their associated party number. The Assignee and Owner fields display the primary email address along with the individual's name
- A new validation rule prevents the same person from being both the requester and assignee for the same request. For example, if the contract request is assigned to a resource organization, and if the requester or owner are part of that organization, then they will be considered a Requester or Owner for that specific request.
- The application now captures and records status change details for each contract request.

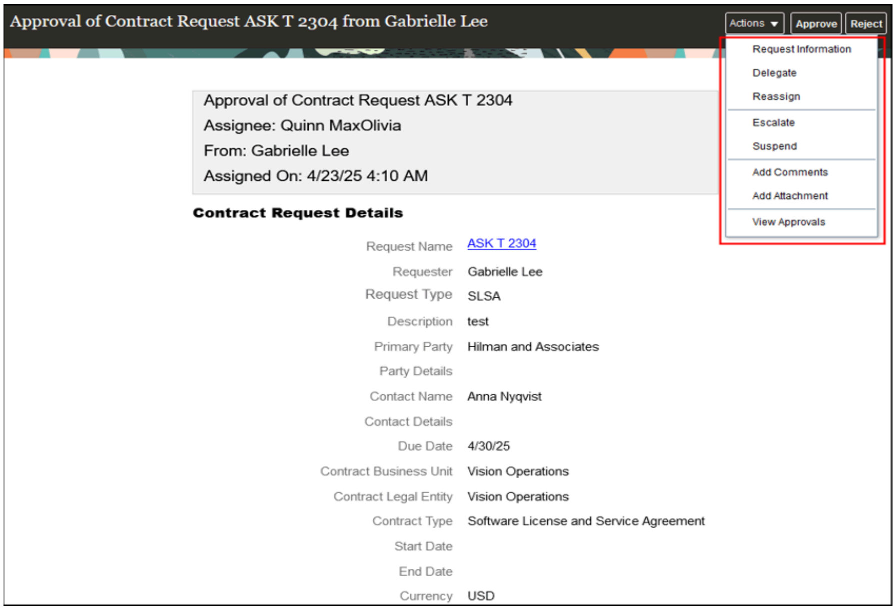
About Extending the Contract Requests UI

You can add custom fields in the UI to capture more information. The entire contract request process is optimized for simplicity and speed, benefiting both the requester and the reviewing teams.

The basic contract request approval notification is replaced with a detailed notification based on a BIP template. It displays all the information from the contract request. Both the workflow and the email notifications can be changed.

You can configure the contract request approval notification to suit your requirement. The following template changes are supported:

- **Logo** - Change the branding logo in the header.
- **Title** - Change the workflow notification title
- **Body** - Add or remove attributes to the report including standard attributes, application composer attributes, custom child objects of contract request, attributes from other contract tables or cross-pillar tables.
- **Header links** - Hide Approve, Reject and Request for Information links from BIP emails
- **Footer links** - Remove link to the Contract UI
- **Style** -Styling the report with different fonts, colors, field position and size changes



The following modifications are supported in contract requests list and edit pages:

- Edit page
  - Hide existing fields
  - Make existing fields as required
  - Make existing fields as read-only
  - Add new custom fields
  - Change the field label
- Display standard and custom fields in list page
- Create dependent fields
- Create a **Create Contract** custom smart action

To create a custom contract request, you must have the following roles:

- Application Administrator (ORA_FND_APPLICATION_ADMINISTRATOR_JOB)
- Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB)
- Customer Relationship Management Application Administrator (ORA_ZCA_CUSTOMER_RELATIONSHIP_MANAGEMENT_APPLICATION_ADMINISTRATOR_JOB)
- Application Developer (ORA_FND_APPLICATION_DEVELOPER_JOB)

For more information about how to perform modifications to contract requests, watch this video: *Overview of Contract Requests*.

Related Topics

- How do I set up Visual Builder Studio (VBS) so I can use it to extend my Sales application?
- Oracle Visual Builder Community