

Create Contract Header

The contract screen is used to create the header (summary) information for a given contract.

Here are the steps on how to create contract header:

1. From the **Contract Management** menu, click **Contracts**. If there's an existing contract, **Search Contract** screen will open. Otherwise, **New contract** screen will open automatically.
2. If Contract search screen opens, click on **New** button to open blank contract screen.

The screenshot shows the IRELY LLC Contracts screen. The left sidebar has a 'Contracts' menu item highlighted. The top toolbar has a 'New' button highlighted. The 'Contract -' form is open, showing the 'Details' tab. The form contains fields for Template, Contract Date, Position, Contract No, Salesperson, Type, Entity Contract, Country, Contract Text, Entity, Pricing Type, Grades, Commodity, Terms, Weights, and Quantity. The 'Created On Save' checkbox is checked.

The screenshot shows the IRELY LLC Contract Report View screen. The left sidebar has a 'Contracts' menu item highlighted. The top toolbar has a 'New' button highlighted. The 'Contract -' form is open, showing the 'Details' tab. The form contains fields for Template, Contract Date, Position, Contract No, Salesperson, Type, Entity Contract, Country, Contract Text, Entity, Pricing Type, Grades, Commodity, Terms, Weights, and Quantity. The 'Created On Save' checkbox is checked.

3. Enter data in the **Details** tab.
4. The below highlighted fields are mandatory to save a contract header.

The screenshot shows the IRELY LLC Contract - Details tab. The 'Details' tab is selected. The form contains fields for Template, Contract Date, Position, Contract No, Salesperson, Type, Entity Contract, Country, Contract Text, Entity, Pricing Type, Grades, Commodity, Terms, Weights, and Quantity. The 'Created On Save' checkbox is checked. The fields for Contract Date, Position, Contract No, Salesperson, Type, Entity, Commodity, and Quantity are highlighted with red dashed boxes, indicating they are mandatory for saving the contract header.

5. To select the contract type, click on the drop down. Select **Purchase/ Sales** from the drop down.
6. If Contract type is Purchase, select a **Vendor** from the vendor drop down.
If Contract type is Sales, select the **Customer** from the customer drop down.

7. To select a Commodity, click on the **Commodity** drop list.
8. Enter the Contract **Quantity**.
9. The **UOM** field is automatically filled in with the default UOM set in the **Inventory> Commodity** option. To change it for a specific contract, select different UOM from the drop list.

10. **Contract Date** defaults to today's date. To change the date, click on the combo box button to open the mini calendar and select date. Press the TAB key to move your cursor to the next field.
11. Enter customer contract info in Customer Contract field.
12. Enter Contact info in Contact field.
13. Select Position fro the drop down.
14. The **INCO/Ship term** field is automatically filled in with the default set in the **Contract Management> INCO/Ship term** option. To change it for a specific contract, select different term from combo box.
15. If INCO/ Ship term is configured as Port/City then, select the **Port/City** from the drop list.

If INCO/ Ship term is configured as warehouse then, select the **Warehouse** from the drop list.

16. Select the **Country** from the drop list.
17. The **Position** field is automatically filled in with the default set in the **Contract Management> Contract position** option. To change it for a specific contract, select different Position from combo box.
18. To select the **Pricing Type**, click on the Pricing Type drop list. Select pricing type.

The screenshot shows the 'Contract - 100' form with the following fields and values:

- Template:** Purchase
- Type:** Purchase
- Entity:** ABC Trucking
- Contact:** (empty)
- Category:** (empty)
- Commodity:** Corn
- Quantity:** 1,000.000 Bushels
- Contract Date:** 11/8/2016
- Entity Contract:** (empty)
- Provisional:** ☐
- Load Based:** ☐ # of Loads: (empty)
- Qty/Load:** (empty)
- INCO/Ship Term:** FCA
- Warehouse:** (empty)
- Country:** United States
- Position:** (empty)
- Pricing Type:** (empty)
- Terms:** (empty)
- Contract No:** 100
- FG Station:** (empty)
- Salesperson:** Bob Smith
- Contract Text:** (empty)
- Grades:** (empty)
- Weights:** (empty)

Below the form is a table with columns: Sequence, Status, Location, Contract It, Item, Start Date, End Date, Pickup/Deliver.

19. The **Terms** field is automatically filled in with the default term set in the **Vendor/Customer** maintenance. To change it for a specific contract, select different Pay terms from combo box.
20. **Contract no** is auto generated by the system. To change it for a specific contract, enter different contract no.
21. Select the **Sales Person** from the drop list.
22. The **Contract Text** field is automatically filled in with the default set in the **Contract Management > Contract Text** option. To change it for a specific contract, select different Text from combo box.
23. Select **Grades** from the drop list.
24. Select **Weights** from the drop list.
25. Check the **Signed** check box as required.
26. **Printed** is automatically checked once the contract is printed.
27. Click on **Save** button.

This screenshot is identical to the previous one, but with the **Save** button in the top menu bar highlighted with a red box. Additionally, the **Terms** field is now set to 'Net 15', and the **Signed** checkbox is checked.