

How To Create New Contract Documents

Here are the steps on how to create a Contract Text:

1. From the **Contract Management > Documents** menu, click **Documents**. If there's are existing documents, **Search Contract Document** screen will open. Otherwise, **New Contract Text** screen will open automatically.
2. If Search Contract Documents screen opens, click on **New** button to open blank Documents screen.

The screenshot shows a web application window titled "Document -". It has a menu bar with "New", "Save", "Search", "Delete", "Undo", and "Close". Below the menu is a "Details" tab. The form contains the following fields:

- Document Name: * (required), empty text input
- Description: empty text input
- Document Type: * (required), dropdown menu showing "Contract"
- Commodity: * (required), dropdown menu showing an empty selection
- Certification: dropdown menu showing an empty selection
- Original: empty text input
- Copies: empty text input
- Standard: checkbox, currently unchecked

At the bottom, there is a status bar with icons for help, search, and email, and a page indicator showing "Page 1 of 1".

3. Enter **Document Name**. Field accepts alphanumeric values.
4. Enter **Description**. Field accepts alphanumeric values.
5. Click on the **Document Type** drop down to select Document Type.

The screenshot shows the "Document - Bill of Lading" form. The "Details" tab is active. The fields are filled as follows:

- Document Name: * "Bill of Lading"
- Description: "Bill of Lading"
- Document Type: * "Contract" (dropdown menu is open showing options: "Document Type", "Contract", "Bill Of Lading", "Container")
- Commodity: * (dropdown menu is open showing options: "Document Type", "Contract", "Bill Of Lading", "Container")
- Certification: "Contract"
- Original: "Bill Of Lading"
- Copies: "Container"
- Standard: empty text input

The status bar at the bottom shows the same icons as the previous screenshot.

6. Click on the **Commodity** drop down to select Commodity.

The screenshot shows the "Document - Bill of Lading" form with the "Commodity" dropdown menu open. The table below the dropdown lists available commodities:

Commodity Code	Description
Coffee	Coffee
Tea	Tea

The other fields in the form remain the same as in the previous screenshot.

7. Click on the **Certification** drop down to select Certification name against the document.

The screenshot shows a web application window titled "Document - Bill of Lading". It has a menu bar with "New", "Save", "Search", "Delete", "Undo", and "Close". Below the menu is a "Details" tab. The form contains several fields: "Document Name" (required, value: "Bill of Lading"), "Description" (value: "Bill of Lading"), "Document Type" (required, dropdown: "Contract"), "Commodity" (required, dropdown: empty), "Certification" (dropdown: open, showing "Fairtrade"), "Original" (value: "Certification Name"), "Copies" (value: "Organic"), and "Standard" (value: "UTZ/ORG"). At the bottom, there are icons for help, search, lightbulb, and email.

8. Enter any **Original**. Field accepts numeric integer values.
9. Enter any **Copy**. Field accepts numeric integer values.
10. Check the **Standard** check box if you want to make it active else left blank.
11. Click on **Save** button.

The screenshot shows the same "Document - Bill of Lading" window. The "Save" button in the menu bar is highlighted with a red box. The form fields are now: "Document Name" (required, value: "Bill of Lading"), "Description" (value: "Bill of Lading"), "Document Type" (required, dropdown: "Contract"), "Commodity" (required, dropdown: "Coffee"), "Certification" (dropdown: "Organic"), "Original" (value: "3"), "Copies" (value: "1"), and "Standard" (checkbox: checked). The bottom bar now includes "Edited", "Page 1 of 1", and navigation arrows.

12. It will save the record.



Note

The record will not be saved if any of these are left blank –Document Name, Commodity, Document Type