

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.

This screenshot shows the IRELY LLC Contracts screen. The left sidebar contains a 'Contract Management' menu with 'Contracts' highlighted. The main area shows a 'Contracts' window with a 'New' button highlighted in a red box. Below the 'New' button, there are fields for 'Template', 'Contract Date', 'Position', 'Contract No.', 'Created On Save', 'Type', 'Entity Contract', 'Country', 'Salesperson', 'Contract Text', 'Commodity', 'Pricing Type', 'Grades', 'Weights', and 'Quantity'. A table at the bottom shows columns for 'Sequence', 'Status', 'Reference', 'Approval Status', 'Location', 'Item', 'Start Date', 'End Date', 'Contracted', and 'UOM'.

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

This screenshot shows the IRELY LLC Contracts screen with the 'Details' tab selected. The fields for 'Template', 'Contract Date', 'Position', 'Contract No.', 'Created On Save', 'Type', 'Entity Contract', 'Country', 'Salesperson', 'Contract Text', 'Commodity', 'Pricing Type', 'Grades', 'Weights', and 'Quantity' are highlighted with red dashed boxes, indicating they are mandatory for saving a contract header. The 'Contract Date' is set to 1/9/2018. The 'Salesperson' field is highlighted with a red dashed box and a search icon. The 'Contract Text' field is highlighted with a red dashed box. The 'Grades' field is highlighted with a red dashed box. The 'Weights' field is highlighted with a red dashed box. The 'Quantity' field is highlighted with a red dashed box.

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

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.