

Create Index Contract

Here are the steps on how to add sequence:

1. Create a [Contract Header](#)
2. At the time of creating contract header select Pricing Type as Index
3. To add sequence, click on the **Insert** button.
4. In the Contract Sequence screen enter the value in **Details tab**.
5. **Sequence No** is system generated. It is non-editable.
6. **Status** defaults to **Open**. Filed is not editable at the time of creation.
7. **Start Date** defaults to Contract date. To change the date, click on the combo box button to open the mini calendar and select date. Default Start date can be configured at System manager company configuration Contract Management

The screenshot shows the 'Company Configuration' window with the 'Contract Management' tab selected. The 'General' section contains various settings. The 'Default Start Date Type' is highlighted with a red box and is set to 'First Date of Current Month'. Other settings include 'Assign Sale Contract' (checked), 'Assign Purchase Contract' (checked), 'Require DP Contract' (checked), 'Auto Create DP Contract' (checked), 'Default Contract Report' (Coffee-CSR-A2019), 'Default End Date Type' (Last Date of the Start Date's Month), 'Default End Date' (9/27/2017), 'Default Salesperson' (Bob Smith), 'Default Packing Description' (Bulk), 'Default Contract Status' (Open), 'Default Container Type' (20 FEET), 'Allow Basis Application to Tickets' (checked), and 'Cash Future Price' (Either).

8. To enter **End Date**, click on the combo box button to open the mini calendar and select date. Default End date can be configured at System manager company configuration Contract Management

This screenshot is identical to the previous one, showing the 'Company Configuration' window with the 'Contract Management' tab. The 'Default End Date Type' is highlighted with a red box and is set to 'Last Date of the Start Date's Month'. All other settings remain the same.

9. To enter **Event Start Date**, click on the combo box button to open the mini calendar and select date.
10. To enter **Planned Availability**, click on the combo box button to open the mini calendar and select date.
11. To enter **Updated Availability**, click on the combo box button to open the mini calendar and select date.
12. The **Location** field is automatically filled in with the default Location set in the User configuration. To change it for a different location, select Location from combo box.
13. The **Item** field is automatically filled in with the item configured for the location. To change item, select item from combo box.
14. **Origin**
15. Enter **Vendor Lot ID**.
16. Select the **Container Type** from the drop list.
17. Enter the **No of containers**.
18. The **Quantity** field is automatically filled in with the default contract header qty. Enter different quantity to change the data.
19. The **UOM** field is automatically filled in with the stock UOM set in the **Inventory > Item** option. To change it for a specific contract, select different UOM from combo box.
20. Net Weight should be field automatically as configured in Item maintenance screen.
21. Enter Original Quantity

22. The **Price Type** field is automatically filled in with the default contract header pricing type i.e Index.

The screenshot shows a form with two main sections: Pricing and ERP. In the Pricing section, the 'Pricing Type' dropdown is highlighted with a red box and shows 'Index'. Below it are fields for 'Index' (a dropdown), 'Adjustment' (a text input), and 'UOM' (a dropdown showing 'Gallon'). The ERP section contains three text input fields for 'ERP PO No', 'ERP Item No', and 'ERP Batch No'.

23. For Index Pricing Type, Index and Adjustment amounts are mandatory.

This screenshot is similar to the previous one, but the 'Index' and 'Adjustment' fields in the Pricing section are highlighted with red boxes, indicating they are mandatory for the Index pricing type.

24. Select Index from the drop down.
25. Enter Adjustment amount.
26. Select UOM from the UOM drop down.
27. In the Contract Sequence screen enter the value in **FX tab**.

The screenshot shows the 'Contract Sequence - 100' screen with the 'FX' tab selected. The tab has sub-tabs: Details, FX, Miscellaneous, History, Activities, and Events. The FX tab contains the following fields: 'Invoice Currency' (dropdown), 'FX Valid From' (calendar icon), 'FX Valid To' (calendar icon), 'Currency Pair' (dropdown), 'Exchange Rate' (text input with a 'Price' checkbox), 'FX Price UOM' (dropdown), 'FX Remarks' (text area), and 'Assumed FX for Marginal Risk Report' (text input).

28. Select the **Invoice currency** from the drop list.
29. To enter **FX Valid From**, click on the combo box button to open the mini calendar and select date.
30. To enter **FX Valid To**, click on the combo box button to open the mini calendar and select date.
31. Select **Currency Pair** from the drop down.
32. Provide valid **Exchange Rate**.
33. Provide Multi line **FX Remarks**.
34. Enter value for **Assumed FX for Marginal Risk Report**.

35. In the Contract Sequence screen enter the value in **Miscellaneous tab**.

Contract Sequence - 100

Save Delete Undo Close

Details FX Miscellaneous History Activities Events

Pickup/Deliver:

Ship Via:

Book:

Sub-book:

Farm Invoice No:

Certifications

+ Insert X Remove View Filter Records (F3)

☐ Certifications

36. Select **Pickup/ Delivery** from the drop list.
37. Select **Transportation** mode from the drop list.
38. Select **Book** from the drop list.
39. Select the **Sub Book** from the drop list. List will display sub books which are associated with the Book.
40. Enter **Farm Invoice No**.
41. Click on **Insert** button to insert certification to the sequence.

Contract Sequence - 2934

Save Delete Undo Close Applied:

Details FX Miscellaneous History Activities (0) Events

Pickup/Deliver:

Ship Via:

Farm Invoice No:

Producer:

Claims to Producer ☐

Fronting ☐

Invoice ☐

Provisional Invoice ☐

Quantity Final ☐

Certifications

+ Insert X Remove Export View Filter

☐ Certifications

Marks

+ Insert X Remove Pattern Export View

☐ Bag Mark* Default

Contract Sequence - 100

Save Delete Undo Close

Details FX Miscellaneous History Activities Events

Pickup/Deliver:

Ship Via:

Book:

Sub-book:

Farm Invoice No:

Certifications

+ Insert X Remove View Filter Records (F3)

☐ Certifications

42. Click on **Save** button.

Contract Sequence -

Save Delete Undo Close

Applied:

Details FX Miscellaneous History Activities Events

Sequence: 1

Status: Open

Start Date: 01/01/2018

End Date: 01/31/2018

Planned Availability:

Event Start Date:

Updated Availability:

Location: 0001-Fort Wayne

Book:

Sub-book:

Contract Item:

Item: 87G

Item Specification:

Origin:

Purchasing Group:

Farm No:

Grade:

Garden:

Vendor Lot ID:

Reference:

Quantity: 10,000 UOM: Gallon

Net Weight: UOM:

Packing Description: Bulk

Original Quantity:

Unit/Layer:

Layers/Pallet:

No. of Sequences:

Container Type:

No. of Containers:

Market Zone:

Discount:

Discount Table:

Schedule Code:

Option:

Split:

Pricing:

Pricing Type: Index

Index: Adj Origin

Adjustment: 0.2 UOM: Gallon

ERP:

ERP PO No:

ERP Item No:

ERP Batch No:

43. Sequence is added with Contract.

Contract -

New Save Search Undo Duplicate Print Email Process Pricing Status Close

Details Additional Info Documentation DMS Audit Log Approval Activities History

Template:

Type: Purchase

Vendor: Adept

Commodity: Gasoline

Quantity: 10,000 Gallon

Contract Date: 01/19/2018

Position:

Entity Contract:

Contact:

Contract No:

Created On Save:

Salesperson:

Contract Text:

Grades:

Weights:

Signed: ☐ Printed: ☐

Insert Remove Open Copy Slice Load Schedule Quality Capture Transfer Export View Filter (F3)

Sequence	Status	Reference	Approval Status	Location	Item	Start Date	End Date	Contracted	UOM
1	Open			0001-Fort Wayne	87G	01/01/2018	01/31/2018	10,000.00	Gallon

Costs Rail Vessel Options Print Remarks

Remove Export View Filter (F3)

Other Charges	Vendor	Cost Method	Currency	Rate	UOM	FX	Accrue	Price	Basis
<input type="checkbox"/>							<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

44. To add another sequence click on the **Insert** button.

45. Click on Contract Header **Save** button to save the entire contract.