

Create Unit Contract

A Unit contract will allow entry of quantity but not futures price or basis.

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 Priced
3. To add sequence, click on the **Insert** button.

Contract Sequence - 100

Details | FX | Miscellaneous | History | Activities | Events

Sequence: 1 Quantity: 1,000.0 UOM: Bushels

Status: Open Net Weight: UOM:

Start Date: 11/8/2016 Packing Description: Bulk

End Date: Original Quantity:

Planned Availability: Unit/Layer:

Event Start Date: Layers/Pallet:

Updated Availability: No. of Lots: 0.200000

Location: 0001 - Fort Wayne No. of Sequences:

Contract Item: Market Zone

Item: CORN Discount:

Origin: Discount Table

Farm No: Schedule Code

Grade: Option:

Vendor Lot ID:

Pricing

Fixation By:

Pricing Type: Price Currency USD

Futures Market CBC Mn/Yr Dec(Z) 16

Basis:

Cash Price: UOM: Bushels

Total Cost:

Marks

+ Insert X Remove Pattern View

Bag Mark Default

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

Company Configuration

Done Save Close

System Manager

General Ledger

Credit Card Recon

Inventory

Purchasing

Sales

Payroll

Notes Receivable

Ticket Management

Contract Management

Risk Management

Logistics

Tank Management

Card Fueling

CRM

Help Desk

Contract Management | Signature | Audit Log (42)

General

Assign Sale Contract ☒

Assign Purchase Contract ☒

Require DP Contract ☒

Auto Create DP Contract ☒

Default Contract Report: Coffee-CSR-A3019

Default Start Date Type: First Date of Current Month

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 ☒

Cash Future Price: Either

Lot Calculation: Round

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

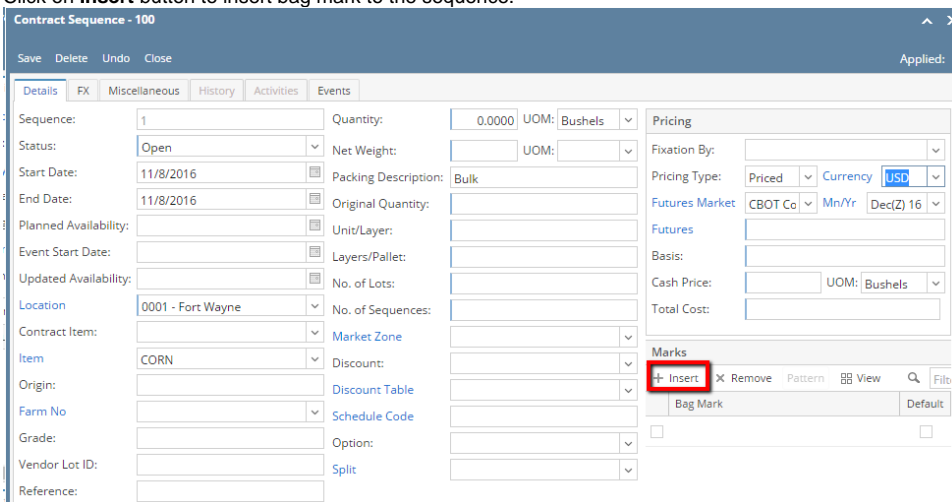
The screenshot shows the 'Company Configuration' window with the 'Contract Management' tab selected. In the 'General' section, the 'Default End Date Type' is highlighted with a red box and set to 'Last Date of the Start Date's Month'. Other settings include 'Assign Sale Contract' (checked), 'Assign Purchase Contract' (checked), 'Require DP Contract' (checked), 'Auto Create DP Contract' (checked), 'Default Contract Report' (Coffee-CSR-A2019), 'Default Start Date Type' (First Date of Current 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).

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. To capture the Garden/Estate name, enter **Farm ID**.
16. Enter **Vendor Lot ID**.
17. Select the **Container Type** from the drop list.
18. Enter the **No of containers**.
19. The **Quantity** field is disabled.
20. 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.

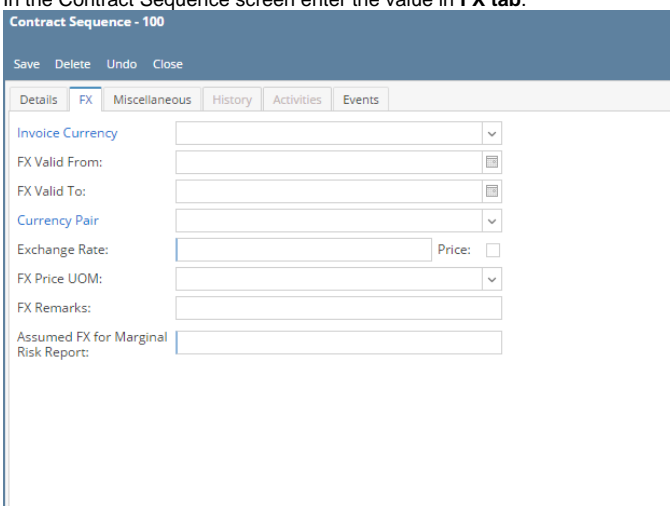
The screenshot shows the 'Contract Sequence - 3471' window with the 'Details' tab active. The 'Quantity' field is disabled. The 'Location' is set to '0001-Fort Wayne'. The 'Item' is set to 'CORN'. The 'UOM' is set to 'Bushels'. The 'Pricing' section shows 'Pricing Type' as 'Unit'. The 'ERP' section shows 'ERP PO No', 'ERP Item No', and 'ERP Batch No' fields.

21. Net Weight
22. Original Quantity
23. Unit/Layer
24. Layer/Pallet
25. Select **Fixation By** from the drop list.
26. The **Price Type** field is disabled.
27. No of Lots
28. Select **Market Zone** from the drop list.
29. Select **Discount** from the drop list.
30. Select **Storage Schedule** from the drop list (this is required for a DP contract).
31. Select **Option** from the drop list.

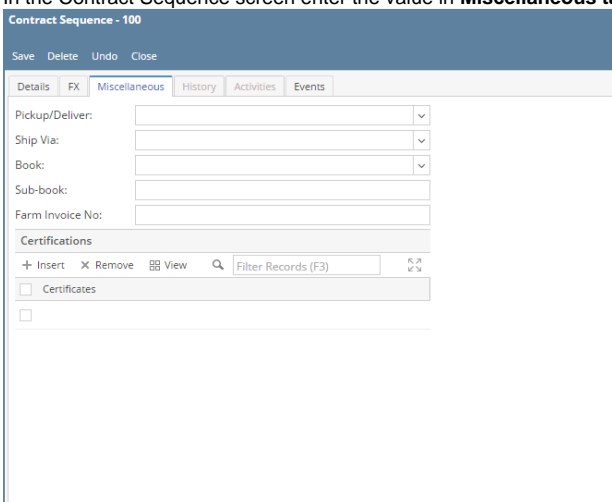
32. Click on **Insert** button to insert bag mark to the sequence.



33. In the Contract Sequence screen enter the value in **FX** tab.



34. Select the **Invoice currency** from the drop list.
35. To enter **FX Valid From**, click on the combo box button to open the mini calendar and select date.
36. To enter **FX Valid To**, click on the combo box button to open the mini calendar and select date.
37. Select **Currency Pair** from the drop down.
38. Provide valid **Exchange Rate**.
39. Provide Multi line **FX Remarks**.
40. Enter value for **Assumed FX for Marginal Risk Report**.
41. In the Contract Sequence screen enter the value in **Miscellaneous** tab.



42. Select **Pickup/ Delivery** from the drop list.
43. Select **Transportation** mode from the drop list.
44. Select **Book** from the drop list.
45. Select the **Sub Book** from the drop list. List will display sub books which are associated with the Book.

46. Enter **Farm Invoice No.**
47. 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 Remove Export View Filter

Certificates

Marks

+ Insert 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 Remove View Filter Records (F3)

Certificates

48. Click on **Save** button.

Contract Sequence - 100

Save Delete Undo Close

Applied:

Details FX Miscellaneous History Activities Events

Sequence: 1 Quantity: 0.0000 UOM: Bushels

Status: Open Net Weight: UOM:

Start Date: 11/8/2016 Packing Description: Bulk

End Date: 11/8/2016 Original Quantity:

Planned Availability: Unit/Layer:

Event Start Date: Layers/Pallet:

Updated Availability: No. of Lots:

Location: 0001 - Fort Wayne No. of Sequences:

Contract Item: Market Zone

Item: CORN Discount:

Origin: Discount Table

Farm No: Schedule Code

Grade: Option:

Vendor Lot ID: Split

Reference:

Container Type:

No. of Containers:

Pricing

Fixation By:

Pricing Type: Priced Currency USD

Futures Market CBOT Co Mn/Yr Dec(Z) 16

Futures:

Basis:

Cash Price: UOM: Bushels

Total Cost:

Marks

+ Insert Remove Pattern View Filter

Bag Mark Default

49. Sequence is added with Contract.

Contract - 100

New Save Refresh Search Delete Undo Duplicate Print Email Process Close

Details

Additional Info

Documentation

Audit Log (0)

Activities (0)

History

Template

Contract Date: 11/8/2016

INCO/Ship Term FCA

Contract No: 100

Type: Purchase

Entity Contract:

Warehouse

FG Station

Salesperson Bob Smith

Entity ABC Trucking

Provisional:

Country: United States

Contract Text

Contact:

Load Based

Position

Grades

Category:

Load: # of Loads:

Pricing Type: Priced

Weights

Commodity Corn

Qty/Load:

Terms Net 15

Signed:

Printed:

Quantity: 1,000.000 Bushels

+ Insert

X Remove

Open

Copy

Slice

Load Schedule

Quality Capture

Transfer

View

Filter Records (F3)

Sequence	Status	Location	Contract It	Item	Start Date	End Date	Pickup/Deliver	Transportation Mode	Contracted	UOM	Balance	Ap
1	Open		CORN		11/8/2016	11/8/2016			1,000.0000	Bushels		

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