Sales Contract Report

Report Module Guide: Sales Contract Report

Module Location

Sales > Reports > Sales Order Reports > Sales Contract Report

Module Objective

The **Sales Contract Report** module is used to generate a detailed list of all Sales Contracts that have been created. This report is used to review the terms and conditions, period, as well as the product and price details within long-term agreements with customers.

1. Report Parameters (Filter)

The main page of this module is a form containing various parameters to customize the report that will be generated.



Here is an explanation for each parameter:

- **Contract Number**:
  - Use this field to search for a report by a specific contract number.

- **Customer**:
  - Filter the report by **All** customers or a **Selected** customer.
- **Document Status / Active**:
  - Use this dropdown to filter contracts based on their document status or active status.
- **Date From / To**:
  - Specify a date range to display contracts that are relevant within that period (e.g., August 1, 2025, to August 31, 2025).
- **Currency**:
  - Choose how currency values will be displayed: **Document** or **Base Currency**.

2. Steps to Generate the Report

Step 1: Set Report Parameters

Select all the parameters you need, especially defining the date range and the customer scope.

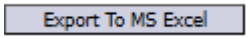
Step 2: Generate the Report

After all parameters are set, click one of the two buttons in the bottom-left section of the page:

- **Display Report**: To preview the contract report directly on your screen.



- **Export To MS Excel**: To download the report data in an Excel file format.



3. Example of the Report View

After you click, the system will generate a detailed report like the following, which details every sales contract.


Print Close

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Sales Contract Report
01 August 2025 - 31 August 2025

Printed On 08/07/2025 10:53:19

Contract Number	Customer	Contract Start Date	End Date	Quotation Number	Quotation Due Date	Item Code	Item Description	Dimension	Qty	Unit	Qty 2	Unit 2	Currency	Unit Price	Discount Value	Discount	Amount	Tax Currency	Tax 1	Tax 2
.:: No Record Found ::.																				

Report Explanation: This report displays a very detailed list of each sales contract along with the items within it.

Key Columns:

- **Contract Number, Customer**: Basic contract information.
- **Contract Start Date, End Date**: The validity period of the contract.
- **Item Code, Item Description**: Details of the products included in the contract.
- **Qty, Unit Price, Amount**: The quantity and value details for each line item in the contract.

Tips & Important Notes

- Use this report to review all contracts that are **expiring or are still active** for follow-up by the sales team.
- This report is a recapitulation of the data input in the **Sales Contract** module. Ensure the data in that module is accurate.
- The **Export to MS Excel** feature is useful for performing further analysis or for archiving contract data externally.

Revision #1
Created 7 August 2025 10:49:42 by Sayu
Updated 7 August 2025 10:55:18 by Sayu